

# **Bonita Open Solution**

Version 5.7

# **Introduction Tutorial**

Application Development User Guidance Profile: *Application Developer* 



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#### Introduction

Use this **Introduction Tutorial** to become familiar with adding customized end-user interfaces such as web forms to a graphical process diagram in Bonita Open Solution.

The steps explained in Part 4 follow the User Guidance checklist in Bonita Studio<sup>\*</sup>. Follow these steps to customize a web form in an executable process diagram example that can be deployed (in development mode) in customized Bonita web applications.

This tutorial includes application of the following features of Bonita Studio:

Forms Add a form to a task or pool Add, remove, move, merge cells in a form Modify grid appearance Configure pageflow Create a multi-page form Create a confirmation page Confirmation page template Choose a look'n'feel

For more information about this set of functions, see the <u>Application Developer Guide</u> in the <u>Bonita Open Solution online documentation</u>. This documentation also contains detailed information about Bonita Open Solution functionality in general.

This tutorial demonstrates how to apply most of the Bonita Studio process design features available in the **Application developer checklist** of User Guidance (SP version). All of these same features are also available in the open source version of Bonita Open Solution, although there is only a single **Application Developer** checklist with all User Guidance features.

<u>User Guidance</u>, <u>User Guidance checklists</u>, and <u>User Guidance profiles</u> are explained in the <u>online BonitaSoft Documentation</u>.

In both versions the application of the User Guidance checklist is the same, as shown in this tutorial.

\*The screenshots in this tutorial were taken from Bonita Studio, *Teamwork* edition, in Application Developer Profile mode. This profile hides some features to simplify the interface. Therefore, in some cases the screenshots are slightly different from the equivalent interface in BOS. The features shown in this tutorial are the same in both (except where noted).



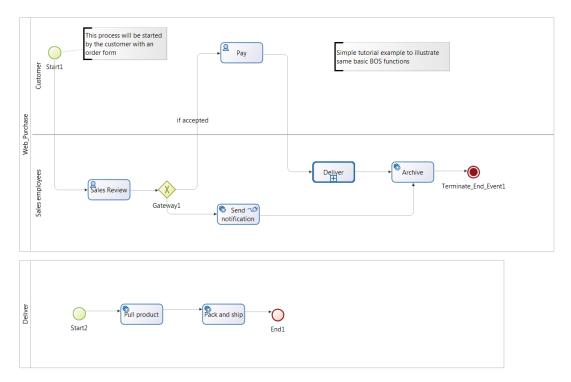
#### **Part 1. Tutorial Process Overview**

In this tutorial you will begin with the process (*MyTutorialProcessDiagram (1.1)*) that was designed with the first tutorial in this series (*Intro Tutorial: Process Design*) and extended into an executable process in the second tutorial in this series (*Intro Tutorial: Process Definition*). If you have not created this process diagram yourself, you can import a copy into Bonita Studio from <u>BonitaSoft Community Contributions</u>.

The process diagram graphically models and can execute the following scenario:

- A customer initiates the process and places an order for a product
- One of the available sales employees reviews the order and either confirms or rejects it
- If the order is accepted, the customer pays for it. The product is prepared and delivered and the transaction is archived
- If the order is rejected, an email notification is sent to the customer and the transaction is archived

Begin with the process diagram MyTutorialProcessDiagram (1.1), which looks like this:



#### Figure 1. Begin with MyTutorialProcessDiagram (1.1)



When you complete this tutorial, the process diagram will look like this:

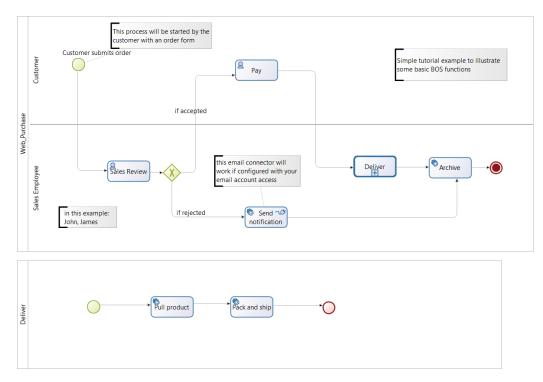


Figure 2. Completed process diagram

You can import a copy of the completed process into Bonita Studio (to compare with what you have created) from <u>BonitaSoft Community Contributions</u>. The name of the completed example is *MyTutorialProcessDiagramCompleted--1.2.bar*.



#### Part 2. Begin with *MyTutorialProcessDiagram (1.1)*

If you have created the process diagram *MyTutorialProcessDiagram (1.1)* by following the step-by-step instruction in *Introduction Tutorial: Process Definition*, open it now.

In Bonita Studio, go to the Menu bar and select **Process > Open**, or go to the Cool bar and select **Open**.

Process Edit Run View Extensions Data		Data types			
<b>°</b>	New				
	Open	1			
	Save	l	15		Ctrl+S
<b>I</b>	Save All			Ctrl	+Shift+S
	Duplicate				
4	Generate	docun	nentatio	o <b>n</b>	
-	Import				
<b>1</b>	Export				
<b>1</b>	Advanced	l Expo	rt		
	Export as				+
	Print				
X	Close				Ctrl+W
××	Close All			Ctrl+	·Shift+W
•	Exit				

Figure 3. Open MyTutorialProcessDiagram from Menu bar



Figure 4. Open MyTutorialProcessDiagram from Cool bar

Select *MyTutorialProcessDiagram* (1.1) from the list of existing processes.

Alternatively, to import the process diagram, first download it from BonitaSoft Community Contributions <u>here</u>: <u>http://www.bonitasoft.org/exchange/extension\_view.php?eid=291</u> (You must be <u>registered</u> and logged in as a BonitaSoft Community Forum user to access the Community Contributions.) Save it locally.

When you have saved the process diagram, go to the Menu bar and select **Process >** *Import*, or go to the Cool bar and select *Import*.



Pro	cess Edit Run	View	Extensions	Data types
2	New			
1	Open			
	Save			Ctrl+S
	Save All		Ctrl	+Shift+S
l 🗑	Duplicate			
-	Generate docun	nentati	on	
2	Import		2	
1	Export			
1	Advanced Expo	rt		
	Export as			•
4	Print			
X	Close			Ctrl+W
*	Close All		Ctrl+	-Shift+W
1	Exit			

Figure 5. Import MyTutorialProcessDiagram from Menu bar



Figure 6. Import MyTutorialProcessDiagram from Cool bar

Select MyTutorialProcessDiagram--1.1.bar and upload it.

Save this diagram and duplicate it to create a new version. To do this, go to the Menu bar and select **Process > Duplicate**.

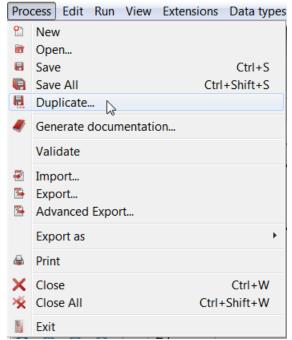


Figure 7. Duplicate the process diagram to save with a new version number



Leave the process name as *MyTutorialProcessDiagram*, and change its version to 1.2. Change the version on the Pool *Web Purchase* and the Pool *Deliver* to 1.2 also.

(s Ch	oose a new Name and Versic	n		X
- Diag Name				
MyT	utorial Process Diagram			
Versio	on			
1.2				
Pool		Manatan	10	
Pool	Web_Purchase	Version	1.2	
Pool	Deliver	Version	1.2	
	ſ	OK		Cancel
	l	UK		Cancer

Figure 8. Change the version numbers on the process diagram and pools

#### Part 3. Customize web applications

Follow this section to customize web applications for a process.

#### 3.1 Add forms

#### 3.1.1 Add an instantiation form

The customer initiates the process and submits a form to order a product. To <u>create this</u> <u>form</u>, click on the pool *Web\_Purchase* and go to its **Details panel > Application tab > Entry pageflow pane**. Click on *Add*.

∫ General ¥ App	lication ×	<b>K</b> Appearance	Esimulation				
🗆 Web_Purchase	□ Web_Purchase						
Entry Pageflow	Forms Tra	nsient Data					
View Pageflow	Pagefl	ow 🔘 Skip 🔘 Re	edirect to URL				
Overview Pageflow							
Resources	type filt	er text	Add				
Look'n'feel			Edit				
Confirmation			Up				
Dependencies			Down				
			Remove				

Figure 9. Add an entry form



Create a new form. (If the button next to *Create a new Form is not ticked*, click on it.) Click on *Next* to continue.

<u>د</u>	J
New Form Create a new form or duplicate one from the list	
<ul> <li>Create a new Form</li> <li>Duplicate a Form from the list below</li> </ul>	
< Back Next > Finish Cancel	

Figure 10. Create a new form

In **Name**, enter customerOrder. The wizard proposes to create form field widgets (of the type noted next to the variable name) for all of the variable types defined in this process. Unselect *confirmation*, *creditCardNumber*, and *expirationDate* as this data will not be entered in the instantiation form. Click on *Finish* to continue.



6	See Co	mentary Car	and from the		
Create a ne	e <del>w</del> Form				
Create a for	m with sele	cted data			
Name	customer	Drder	(customerOrder)	)	
Description					
beschption					
Add widget	ts based on				
Select All	Unselect	AII			
confirm	confirmation -> CheckBox				
	ardNumber				
	erEmail erName				
	onDate_				
roduct	S	-> Radio but	ttons		
< Bac	k	Next >	Finish		Cancel

Figure 11. Create a form with widgets based on defined variables

The <u>Form Builder</u> will appear, with an initial form with three fields to be customized.

*	F
-	customerEmail I
÷	
-	customerName I
÷	
-	products (0)
÷	
-	Submit1
÷	

Figure 12. Form in Form Builder



In its Details panel > General tab > General pane, change Show page title to Customer Order to rename the form.

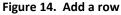
<b>J</b> General	× KAppearance	
🛚 custom	erOrderFinishe	d
General	Name	customerOrderFinished ( customerOrderFinished )
Validators		
Actions	Show page title	Customer Order
	Description	
	Page Template	Clear Use layout generated from design

Figure 13. Change form page title

#### 3.1.2 Move cells in a form

To change the order of the fields in the form, start by adding a blank cell. Click on the green + to add a row above the cell for *customerEmail* as shown in the figure below.

	ert a row CustomerEmai	I I	
-	customerNam	eI	
-	products	© - © -	



Click and drag the *customerName* widget into the blank cell.



	• •
*	
-	
	$\searrow$
-	customerEmail I
•	
-	customerName I
•	
-	
-	products
	©
÷	
-	Submit1

Figure 15. Move a form field widget

In the same way, move the *products* widget up below *customerEmail*.

Delete the blank row by clicking on the red – .

	•		•
-	customerNam	eI	
-	customerEmai	il [I	
-	products	© ©	_
Re	move a row Subn	nit1	

Figure 16. Remove a row



#### 3.1.3 Customize form fields using widgets

Click on *customerName*. In its **Details panel > General tab > General pane**, change the label to Full Name. Leave **Show label** ticked. Leave the **field type** as *text field*.

ĴGeneral × ]	Y Appearance		
I abc custome	rName		
General	Name	customerName	( customerName )
User aids			
Options	Show label	Full Name	▼ Allow HTML
Data			
Validators	Description		
Contingencies			
	Field type	Text field 🔹	

Figure 17. Change the label on another form page

Click on *customerEmail*. In its **Details panel > General tab > General pane**, change the label to Email address. Leave Show label ticked. Leave the field type as *text field*.

Click on *products*. In its **Details panel > General tab > General pane**, change the label to Promotional products available. Leave Show label ticked. Change the field type to *Select*.

∫ General ×	Appearance		
products			
General	Name	products	( products )
User aids			
Options	Show label	Promotional products available	<ul> <li>Allow HTML</li> </ul>
Data			
Validators	Description		
Contingencies			
	Field type	Select  Radio buttons Select Suggest Box	

Figure 18. Change the field type

Click on *Submit1*. In its **Details panel > General tab > General pane**, change the label to Submit. Leave **Show label** ticked. Leave the **field type** as *Submit*.



The form now looks like this:

÷	•	•
-	Full Name	I
-	Email address	Ι
•	products	•
•	Submit	
•		

Figure 19. Customized form in Form Builder

Preview the form as it has been configured so far by clicking on *Preview* in the Cool bar. It will appear in the default Bonita web application.

<b>Solution</b>	n	Web_	admin  Logout <b>_Purchase</b>
customerOrder			
Full Name	\${customerName}		
Email address	\${customerEmail}		
Promotional products available	item1 Submit		•
	Created with Bonita Open Solution		

Figure 20. Preview a form

#### 3.1.4 Add a form to Sales Review

To design the next form, go back to Bonita Studio and click on the task *Sales Review*. Go to its **Details panel > Application tab > Entry pageflow pane**. Click on *Add*.

Create a new form. (If the button next to *Create a new Form is not ticked*, click on it.) Click on *Next* to continue.



Leave **Name** as *Sales Review*. Again the wizard proposes to create form field widgets (of the type noted next to the variable name) for all of the variable types defined in this process. Unselect *creditCardNumber*, and *expirationDate*. Click on *Finish* to continue.

Rearrange and rename the field widgets so the form looks like this:

÷.	•
-	Customer Na
-	Customer Em
-	Products sele
-	confirmation 🗹
-	Submit

Figure 21. Re-order and re-name fields

This time, change the customer name, email, and products fields in the form to "read-only".

To do this, click on the first widget to change: *Customer Name*. In its **Details panel > General tab > General pane**, change the field type to **Text**. (This field type does not allow data entry.)

∫ General ×	& Appearance	Checkbox Date		
I abc custome	rName	Duration		
		HTML widget		
General	Name	Hidden	( cust	tomerName )
User aids		IFrame		7
Options	Show label	Message Password	ne 🔻	Allow HTML
Data		Rich text area		
Validators	Description	Text Text area		
Contingencies		Text field		
	Field type	Text field 🔹	[	

Figure 22. Change field type

Do the same for the *Customer email* field.



+	•
-	Customer Na Abc
+	
- [	Customer Em Abc
•	
-	Products sele
• }	
- [	confirmation
•	
-	Submit
<u>а</u> (	

Figure 23. Form fields changed to text (read-only)

Create a new field for *Products selected*. Add a row, then go to the widget palette and drag and drop a text widget into place.

🖣 👶 Palette	
<b>↓</b>	*
Checkbox	
Eneckbox list	- Customer Na Abc
Date	customer ru
Ouration	•
*** Password	
E tist	- Customer Em Abc
Radio buttons	
Select	•
footar Suggest Box	
I abc Text field	- N
IIII Text area III	
Rich text area	
abc Text	- · · · · · · · · · · · · · · · · · · ·
Mes Non editable text	Products sele
🔍 Sub <mark>field</mark>	
Previous	
Mext	- confirmation
Simple Button	
File	•
📑 Image	
Table	Submit
Editable grid	
I Hidden	•

Figure 24. Add a text widget



Click on the new Text1 field and rename it to productsSelected, label Products selected.

JGeneral ×	K Appearance				
abc product	productsSelected				
General	Name	productsSelected	( productsSelected )		
User aids					
Options	Show label	Products selected	<ul> <li>Allow HTML</li> </ul>		
Data					
Contingencies	Description				
	Field type	Text •			

Figure 25. Create a text widget for the *Products selected* field

Delete the other "Products selected" widget with the radio buttons.

Associate the data entered in the *Products selected* field in the *Customer Order* form with this new field. To do this, click on the Products Selected widget, and go to its **Details panel** > **General tab** > **Data pane**. To the right of the **Initial value** field, select *Edit expression*.

<b>productsSelected</b>	
General User aids Multiple ? This widget can be duplicated	
Options	×
Data       Contingencies       Initial value       Allow HTML	Internationalization reference         Connectors         Edit expression         Create data         Select reference in context

Figure 26. Use expression editor to set the initial value of the field

The expression editor appears. Use the dropdown menu at the top to select the variable *products*. The data saved to this variable earlier in the process will be presented in this field when the form appears. Click on **OK**.



Process Variables	Select 🗸	Bonita Variables Sel	ect			•
+ - * / ==	Select confirmation : Boolean creditCardNumber : java.lang.Long					
	customerEmail : Text		^		Set Variables	
	customerName : Text expirationDate_ : Date					
	products : MyTutorialProcessDiagram_1_2.Promotional_products					
	1. State 1.					
				1		
						-
					•	
4			Ψ h		Evaluate	
	A 🔻		,			
Categories	Functions	Documentation				
User defined (0) Bonita (9)	type filter text				· · · · · · · · · · · · · · · · · · ·	ň.
Collection (44)						
Number (68) String (180)						
Others (467)						-
Save	Open Groovy Quick Start				OK Cancel	

Figure 27. Choose variable for the expression for initial value

Since the initial value is simply the variable contents, the simple variable appears in the initial value field.

JGeneral ×	<b>∦</b> Appearance					
abc product	abc productsSelected					
General						
User aids	Multiple 9	This widget can be duplicated				
Options	<u>°</u>	(products)	_			
Data	3	{products}	•			
Contingencies			Internationalization reference			
			Connectors			
	Initial value		Edit expression			
			Create data			
		~	Select reference in context			
		Allow HTML				

Figure 28. The text field will show the content of the \${products} variable

Change the label of the confirmation widget to Order confirmed. *Save* the form (click on the *Save* icon in the cool bar).

#### 3.1.5 Add a form to Pay

To design the next form, click on the task *Pay* and go to its **Details panel > Application tab > Entry pageflow pane**. Click on *Add*.

Create a new form. (If the button next to *Create a new Form is not ticked*, click on it.) Click on *Next* to continue.



**Name** the form orderConfirmation . Again the wizard proposes to create form field widgets (of the type noted next to the variable name) for all of the variable types defined in this process. Select only *customerName*. Click on *Finish* to continue.

Label the form Order Confirmation.

Rename and change the Customer name field widget type (to *Text*); and add a text field for Products chosen, so the form looks like this:

•	+
-	Customer Na Abc
÷ :	Products cho Abc
- +	Submit1

Figure 29. Create a form for Pay

Associate the data entered in the *Products selected* field with new field. To do this, click on the Products chosen widget, and go to its **Details panel > General tab > Data pane**. To the right of the **Initial value** field, select *Edit expression*. Select the variable *products* from the dropdown list of process variables.

#### 3.2 Configure pageflow

#### 3.2.1 Create a two-page form

<u>Create a two-page form</u> on this step. To do this, go back to the process diagram, click on *Pay*, and go to its **Details panel > Application tab > Entry pageflow pane**. Click again on *Add*.

🖋 General 🛛 🐌	Application × Appearance ZSin	nulation
🔒 Pay		
Entry Pageflow	Forms Transient Data	
View Pageflow	Pageflow Skip Redirect to URL	
Confirmation		
	type filter text	AddN
	orderConfirmation	Edit
		Up
		Down
	R	emove

Figure 30. Add another page to a form



Select *Create a new form* and name it Pay. Select *creditCardNumber* and *expirationDate* to create field widgets.

A second page is created, which looks like this:

	revious Form	
4	•     • •	• •
-	creditCardNu	Ī
+	expirationDate	01 / 01 / 2010
-	Previous1	Submit2

Figure 31. Second page of the form

To complete the form configuration:

Re-label creditCardNumber to Credit card number.

Re-label expirationDate to Expiration date.

Re-label Previous1 to Previous page.

Re-label Submit2 to Submit.

Click on **Previous Form** to make some necessary changes to the first page of this multi-page form.

Previous Form	-	+ -	
-	Credit Carc	ł N I	
-	Expiration [	Da 01 / 01 / 2010	
-	Previous page	Submit	

Figure 32. Complete page 2 and go back to page 1

Click on the *Submit1* button and re-name it to Continue to payment. Change its type to **Next**.



Ĵ General ×	₭ Appearance		
🕨 Submit1			
General	Name	Submit1	(Submit1)
User aids			
Options	Show label	Continue to payment	•
Contingencies			
	Description		
	Field type	Next	

Figure 33. Change button type from Submit to Next

#### 3.2.2 Modify form grid

Preview the existing first page of the form on *orderConfirmation*. To do this, click on *Preview* in the Cool bar.

<b>Solution</b>	admin Logout Web_Purchase
rderConfirmation	
Customer Name \${customerName}	
Products chosen \${products} Continue to payment	
Created with Bonita Open Solution	

Figure 34. Preview form with default grid

One way to change the spacing of the fields on the form is to modify the form grid. To do this, go back to the form *orderConfirmation*. Click on the *Continue to payment* button widget.

In its **Details panel > Appearance tab > Grid pane**, change the values in **Column width** (enter 1000) and **Row height** (enter 160).

Preview the page to see the resulting layout change.





Figure 35. Change layout of fields by modifying grid

#### 3.2.3 Check off User Guidance

To apply the <u>User Guidance checklist</u>, go to the Cool bar and click on **User Guidance**.



Figure 36. Select User Guidance to see the checklist

The User Guidance checklist will appear. Check off each of the tasks completed so far, and click on **Done** for each one:

- Add a form to a task or a pool
- Add , remove, move, merge cells in a form
- Modify grid appearance
- Create a multi-page form

The next example will show how to modify a confirmation page. If you are using the BOS Subscription Pack, *Skip* the tasks up to *Create a confirmation page*.



ks list ( Application Developer )	
≪ Run ▲	Access online document
Contexts     Debug     Configure BAM     Forms	Use a connector to fill in transient variables (SP) (Category: Forms Modeling)
<ul> <li>Add a form to a task or a pool</li> <li>Add, remove, move, merge cells in a form</li> <li>Modify grid appearance</li> <li>Configure pageflow</li> <li>Create a multi-page form</li> <li>Define order of pages in a multipage form dyr</li> <li>Special fields</li> <li>Multi-instantiated data fields</li> <li>Use complex data in multiple fields</li> <li>Use connector to fill in a field value</li> <li>Use connector to update a field value</li> <li>Use connector to update a field value</li> <li>Use connector to fill in transient variables</li> <li>Create a confirmation page</li> <li>Confirmation page template</li> <li>Choose a look'n'feel</li> <li>Translate</li> </ul>	Use a connector output to fill in an initial value (initialize) a transient data field used inside a form pageflow. To do so, go to the Details for a task or pool, and in the Application tab select Entry, View, or Overview Pageflow -> Transient Data tab. From the options available in the Connectors for data initialization field, select Add. The Connector wizard will appear. Select and configure the connector you want to use (for example, choose an output from a database to update the value).
• III	Get latest version of content Skip >> Do

Figure 37. User Guidance checklist

#### 3.3 Create a confirmation page

#### **3.3.1** Change confirmation message

When a user submits a form, a confirmation message can be presented. For example, when the customer submits the instantiation form *customerOrder*, a default message appears as shown below:



Figure 38. Default confirmation message when instantiation form is completed

<u>To change this confirmation message</u>, click on the *Web\_Purchase* pool, **go to its Details** panel > Application tab > Confirmation pane. Enter a confirmation message, for example: Thank you for your order. We'll ask you for payment shortly.



	lication × MAppearance Zimulation
□ Web_Purchase	
Entry Pageflow	Confirmation layout Download default Browse Clear
View Pageflow	
Overview Pageflow	
Resources	Confirmation message
Look'n'feel	Thank you for your order. We'll ask you for payment shortly.
Confirmation	
Dependencies	

Figure 39. Add a custom confirmation message

When you run the process, this confirmation message will appear instead of the default:

/ honitaonen	admin   Logout
<b>S</b> bonitaopen solution	Web_Purchase
Thank you for your order. We'll ask y	ou for payment shortly.
Created with Bonita Ope	n Colution

Figure 40. Custom confirmation message

#### 3.3.2 Use a confirmation page template

Add a customized confirmation page to *Pay*. To do this, click on *Pay*. Go to its **Details panel > Application tab > Confirmation pane.** Click on *Download default*.

🖋 General 🛛 📡	pplication × KAppearance Zimulation
요 Pay	
Entry Pageflow View Pageflow	Confirmation layout Download default Browse Clear
Confirmation	Confirmation message

Figure 41. Add a confirmation page template



When the wizard appears, the hidden file <code>bonita\_default\_confirm.html</code> will appear. Click on *Save* to save it to a target folder of your choice

G Save As		x م
Wight		4
Organize   New folder		- ()
☆ Favorites	Name	Date modifi
E Desktop	confirmation.html	03/01/2012
Downloads	consultation.html	03/01/2012
L Dropbox	error.html	03/01/2012
laces	process.html	03/01/2012
Libraries B Documents	< <u>III</u>	4
File name: bonita_default_confirm.ht	tml	•
Save as type: *.*		•
See Hide Folders	Save	Cancel

Figure 42. Download and re-import a default template

Click on *Browse* and navigate to where you have just saved the file. Upload it.

Enter a confirmation message, for example: Thank you for your payment.

#### 3.3.3 Check off User Guidance

To apply the User Guidance checklist, go to the Cool bar and click on **User Guidance**.

Click on *Confirmation page template.* When you click on *Done*, *Create a confirmation page* will show up marked *Done* also.

#### 3.4 Choose a look'n'feel

Run the process to see it deploy in the Bonita default web applications, then change its look'n'feel.

#### 3.4.1 Run the process

Go to the Cool bar and click on the **Run** icon. The 2 processes in the process diagram (*Web\_Purchase* and *Deliver*) will deploy (in a test mode).

The instantiation form will appear in the default web browser. (You are <u>logged in</u> <u>automatically</u> as *Admin*.)



<b>Solution</b>	admin   Logout Web_Purchase
Customer Ord	er
Full Name	
Email address	
Promotional products available TV	•
Submit	
Created with Bonita Ope	n Solution

Figure 43. Customer order form

As admin, play the role of the customer and enter a name, email address, and select a product. Click on *Submit*.

	Bonita User Experience 🗳
<b>Solution</b>	admin   Logout Web_Purchase
Customer Order	
Full Name Gerry Mander	
Email address g.mander@example.com	1
Promotional products available mobile phone	•
Submit	
Created with Bonita Open S	Solution

Figure 44. Complete the customer order form

The confirmation message appears.

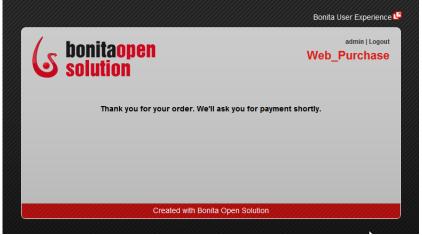


Figure 45. Confirmation message after customer submits order



The customer's instantiation has completed. The next task, *Sales Review*, was assigned earlier to the actors on the lane *Sales employees*.

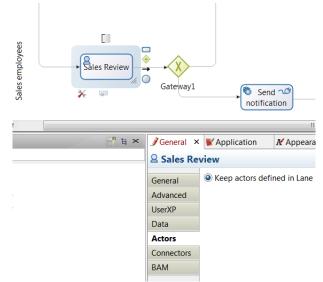


Figure 46. Reminder: Actors assigned to Sales Review

The sales employees were defined in the lane's actor selector to be john and james.

6		
Enter individuals	' names, separated by	r a comma
Names or variable	i john.james	Save connector configuration      Test Configuration
< Back	Next >	Finish Cancel

Figure 47. Reminder: Sales employees are john and james

So to see the next step/task, log out of BOS as Admin,



Figure 48. Log out of Bonita User Experience

and sign in as *john*, using the password bpm.





Figure 49. Log in as john

	Bonita User Experience 📮
<b>Solution</b>	Web_Purchase
Sales Review	
Customer Name Gerry Mander	
Customer Email g.mander@example.com	
Products selected mobile phone	
Order confirmed	
Submit	
Created with Bonita Open Solution	

Figure 50. Complete Sales Review form

As *john*, you'll see the Sales Review task web form. Check the **Order confirmed** checkbox and click on **Submit**.

The next window is an un-customized confirmation form. The next task in the process is to be performed by the customer though, so logout as *john* and log back in as *admin* (initiator-"customer").

The first page of the 2-page form on the step/task *Pay* is presented. Click on *Continue to payment*.



<b>S</b> bonitaopen	admin   Logou Web_Purchase
Order Confirmation	
Customer Name Gerry Mander	
Products chosen mobile phone	
C	ontinue to payment
	3

Figure 51. First page of two-page form

Enter a Credit Card Number and an Expiration Date, and click on Submit.

,	Bonita User Experience
<b>Solution</b>	admin   Logout Web_Purchase
Рау	
Credit Card Number 123456789	
Expiration Date 2012 May 25	
Previous page	Submit
Created with Bonita Open §	Solution

Figure 52. Second page of two-page form

The customized confirmation form for this sequence appears.



Figure 53. Customized confirmation message



The process has completed the *Delivery* subprocess and *Archive* steps. To see this in Bonita User Experience, click on the **Bonita User Experience** icon (circled in the figure above).

This will sign you into the Admin's User Experience inbox. As there are no incomplete steps left in the process, nothing is visible in the **User view** of the inbox. Click on **Administration** in the upper right to see the **Administration View** of Bonita User Experience.

<b>Solution</b>	Bor	<b>ita</b> User			_		
<b>Solution</b>			admin E	nglish	Preferences	About   Administration   Logo	ut
	Inbox				(	Switch to the adm	inistration view.
Inbox	Labels Refresh					Edit filter 0-0 of 0	
Starred *							
My cases							
At risk							
Overdue							1
▶ more							
Start a case							
Deliver 🕨							
Web_Purchase ►							
Dashboard							
	Labels Refresh					0 - 0 of 0	

Figure 54. Bonita User Experience inbox, User View

This case has completed and is no longer an "open case." In the administration view, select **Show archived cases only**.

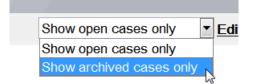


Figure 55. Show archived cases in Administration view

The process *Web\_Purchase* shows in the list of cases as a completed process.



<b>Solution</b>	Bonita User Ex	xperience admin English	About   User view   Logou
<ul> <li>Processes Processes Cases</li> <li>Documents</li> <li>Categories</li> <li>Organization</li> <li>Users</li> <li>Privileges</li> <li>Reporting</li> <li>User labels</li> <li>Monitoring</li> <li>Server</li> <li>Configuration</li> </ul>	Cascs Cancel Delete Refresh  Web_Purchase - #1 • V Terminate_End_Event1	Show archived cases only Edit filter 1 - 1 of 1 6:06 PM 2/7/12	Last update 6:17:11 PM. X
	Cancel Delete Refresh	1 - 1 of 1	

Figure 56. User Experience, Administration view (archived cases)

To see all steps in this process, click on it to expand the case.

<b>Solution</b>			Bonita User Expe		admin English	About   User view   Logou
Processes Processes	« Back to the c	ases list Modify Cance	Delete More actions V Refrest			
Cases Documents	☆ Web_Purcha Attachments 4					
Categories	Name	Version	Filename	Author	Created on	
<ul> <li>Organization</li> <li>Users</li> </ul>						
Privileges  Reporting  User labels  Monitoring  Server  Configuration						
	Comment fee	-				
	There are no co	mments attached to this	case.			
	Case overview					
	history ov					
		12 Case started by admin 12 The step "Start1" has t				
		12 The step "Sales Review				
		12 The step "Gateway1" h				
		12 The step "Pay" has be				
	6:06 PM 2/7/1	12 The step "Start2" has t	een completed.			
	6:06 PM 2/7/1	12 The step "Pull product"	has been completed.			
	6:06 PM 2/7/1	12 The step "Pack and sh	ip" has been completed.			
	6:06 PM 2/7/	12 The step "End1" has be	een completed.			
		12 The step "Archive" has				
	6:06 PM 2/7/1	12 The step "Terminate_E	nd_Event1" has been completed			
	« Back to the c	ases list Modify Cance	Delete More actions Refrest	h		

Figure 57. Completed process

#### 3.4.2 Change the look'n'feel of the web application

<u>Change the default web form look'n'feel</u> for this process. To do this, click on the *Web\_Purchase* pool and go to its **Details panel > Application tab > Look'n'feel pane**. Click on **Apply a look'n'feel**.



🖋 General 🛛 😻 App	plication × KAppearance	ZSimu	Ilation				
□ Web_Purchase							
Entry Pageflow	Apply a look'n'feel Save as	a new loc	k'n'feel C	urrently	based	on: Default Application	
View Pageflow		0			<b></b>		
Overview Pageflow	Process container ?	0	Bro	owse	Edit	Download default	
Resources	Process layout 💡	<b>V</b>	Bro	owse	Edit	Download default	
Look'n'feel	Entry form page template 💡	<b>V</b>	Bro	owse	Edit	Download default	
Confirmation	Consultation form page templ	ate 💁		owse	Edit	Download default	
Dependencies	consultation form page temp			00030	Luit		
	Error layout 💡	<b>V</b>	Bro	owse	Edit	Download default	

Figure 58. Apply a new look'n'feel

A set of example look'n'feels provided with Bonita Open Solution appears.

Select any of the examples under **Web templates** (for example, *gradient grey*) and click on *Finish*.

6	and from the local		🗆 🗙
Select a Web Template			
Choose a built-in Web Templa	te from the list above		0
Web Templates (15)	Under Verden Responset	Render Wangemeit Statution Team	*
Default Application	My custom Look'n'Feel	One column black	
One column dark green	One column green	Two columns orange grey	
	Contraction of the second seco		
Two columns red black	black-large	black-xl	
gradient blue	gradient grey	gradient orange	
gradient red	grey	white	~
Remove Export Import			
		Finish	Cancel

Figure 59. Select a different look'n'feel to apply

This will attempt to apply the chosen look'n'feel to the process. Confirm that this is correct - click on **Yes**.



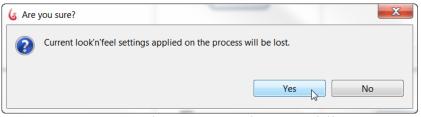


Figure 60. Confirm application of a new look'n'feel

The look'n'feel chosen will be applied to the process overall and to the entry form (see the green checks.)

🖋 General 🛛 💕 App	olication × MAppearance	<b>≓</b> Simu	lation			
Eustomer						
Entry Pageflow	Apply a look'n'feel Save as a new look'n'feel Currently based on:					
View Pageflow Overview Pageflow	Process container ?	0	×	Browse	Edit	Download default
Resources	Process layout 9	<b>V</b>	×	Browse	Edit	Download default
Look'n'feel	Entry form page template 💡	<b>v</b>	×	Browse	Edit	Download default
Confirmation	Consultation form page template	e 90	×	Browse	Edit	Download default
Dependencies	Error layout ?	0	×	Browse	Edit	Download default

Figure 61. New look'n'feel will apply to forms

 Customer Order

 Full Name

 Full Name

 Trainil addrese

 Promotional products available

 Tots workflow has been defined with Boalta Open Solution 1

Run the process again. The customer Order Form will appear in the new look'n'feel.

Figure 62. Form appears in new look'n'feel

#### 3.4.3 Check off User Guidance

To apply the User Guidance checklist, go to the Cool bar in Bonita Studio and click on **User Guidance**. Click on *Choose a look'n'feel*, on *Done* and then on *Close*.

#### 3.5 Clean up the diagram

As a final touch to the tutorial example diagram, you can:

Take off start, gateway, and end event labels. Click on the event (for example, on *Start1*) and go to its Details panel > Appearance tab > Label pane and untick Display Name.



Add annotations to give information that is not easily visible in the diagram, for example:

Add an annotation in the lane Sales employee to note that john and james have been specified in the actor selector. (This can serve as a reminder that the tester can sign out as admin and back in as john or james to see Sales Review in a user's inbox when this example process is run.)

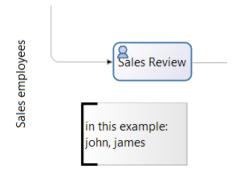


Figure 63. Add an annotation

#### Part 4. For more tutorial examples

More information about these features can be found in the Bonita Open Solution online documentation.

The development of the example used in the tutorial is shown in the previous tutorials for Process Design and Process Definition.

#### Part 5. Feedback, Questions, and More Information

If you explore a bit more in **Bonita Open Solution**, you will find many more functionalities not addressed in this Intro Tutorial.

Follow the links below:

#### **More Functionalities**

For further explanation of the features and functionalities in Bonita Open Solution, see the Bonita Open Solution online documentation. http://www.bonitasoft.com/resources/documentation/index.php

#### **BonitaSoft Forum**

We welcome your feedback on the BonitaSoft Forum. Ask your questions too. Use the **BonitaSoft Forum** to let us have it! http://www.bonitasoft.org/forum/

#### **BonitaSoft Community**

Join the BonitaSoft Community and get our Newsletter, access detailed information, and more.

http://www.bonitasoft.org/register.php



Bug Tracker, Source Code Check out our <u>Bug Tracker, Source Code</u>. <u>http://www.bonitasoft.org/index.php</u>

#### **Feedback on this tutorial, or on documentation in general** Submit an issue on <u>documentation feedback</u>. <u>http://www.bonitasoft.org/bugs/bug\_report\_advanced\_page.php</u>

#### More information

For more information, contact us at <u>www.bonitasoft.com</u> <u>http://www.bonitasoft.com/company/contact.php.</u>

Have fun with Bonita!