



bonitasoft

open your processes

Bonita Open Solution

Version 5.7

Introduction Tutorial

Application Development

User Guidance Profile: *Application Developer*

Bonita Open Solution 5.7 Intro Tutorial

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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*. 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 [Application Developer Guide](#) in the [Bonita Open Solution online documentation](#). 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.

[User Guidance](#), [User Guidance checklists](#), and [User Guidance profiles](#) are explained in the [online BonitaSoft Documentation](#).

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).

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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 [BonitaSoft Community Contributions](#).

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:

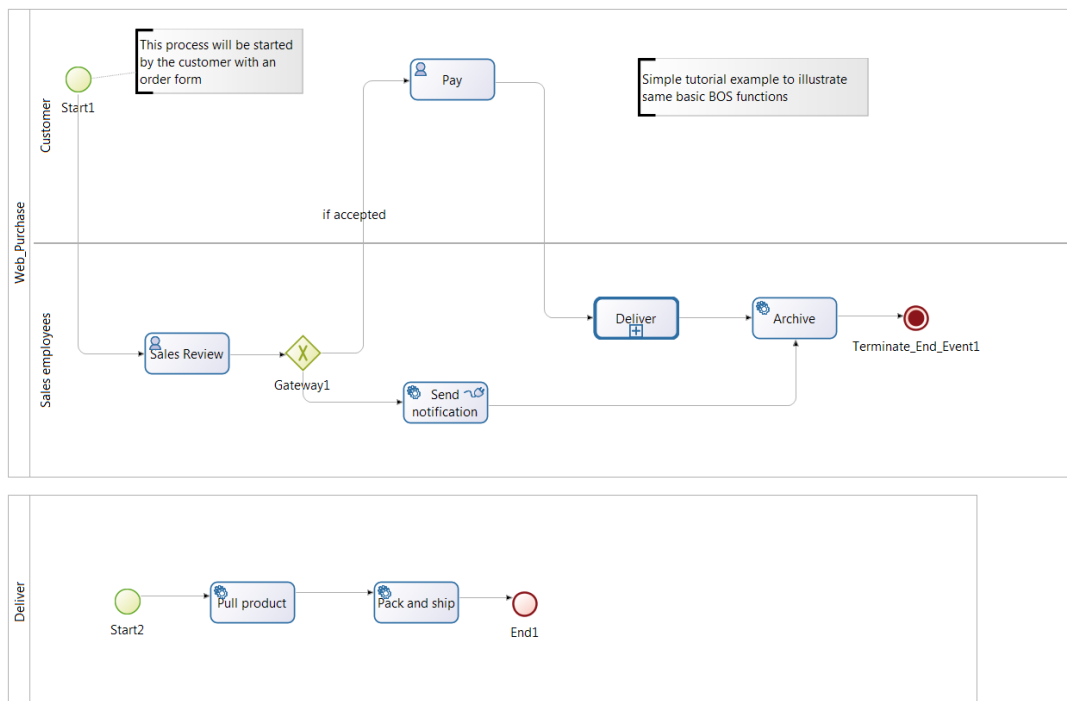


Figure 1. Begin with *MyTutorialProcessDiagram (1.1)*

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

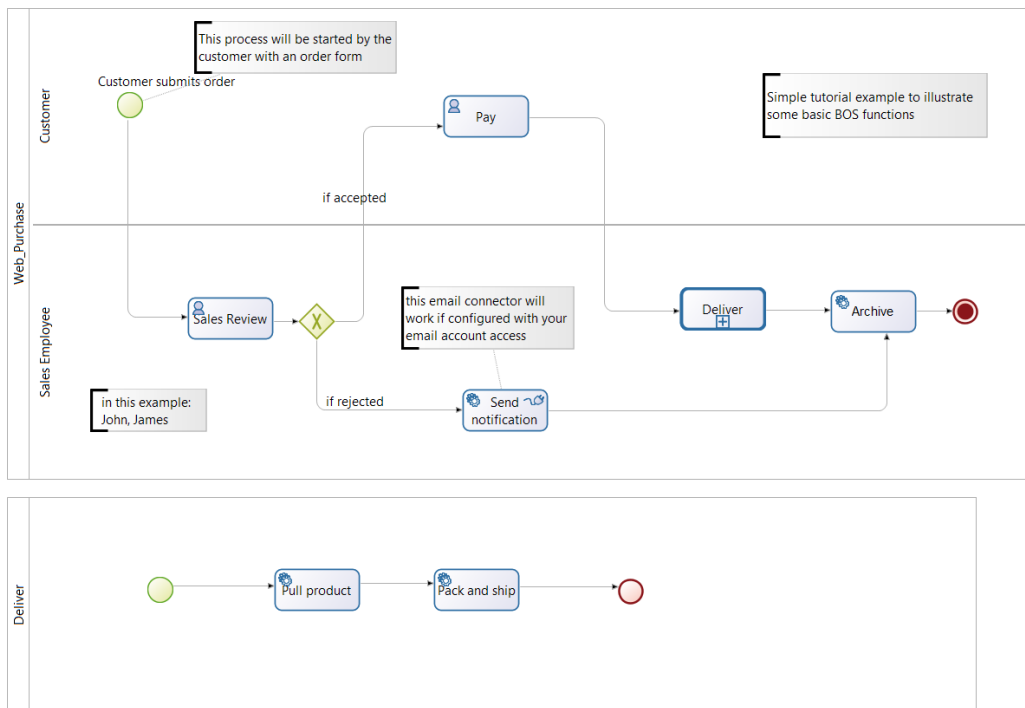


Figure 2. Completed process diagram

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

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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**.

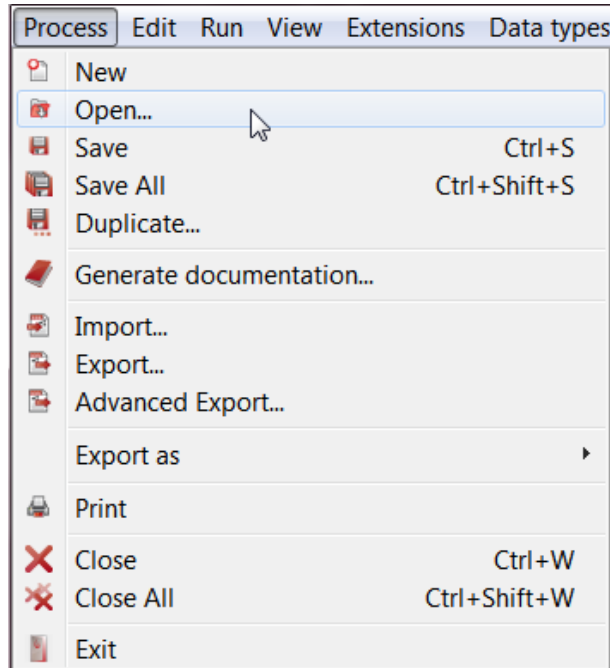


Figure 3. Open *MyTutorialProcessDiagram* from Menu bar



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 [here](http://www.bonitasoft.org/exchange/extension_view.php?eid=291): http://www.bonitasoft.org/exchange/extension_view.php?eid=291 (You must be [registered](#) 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**.

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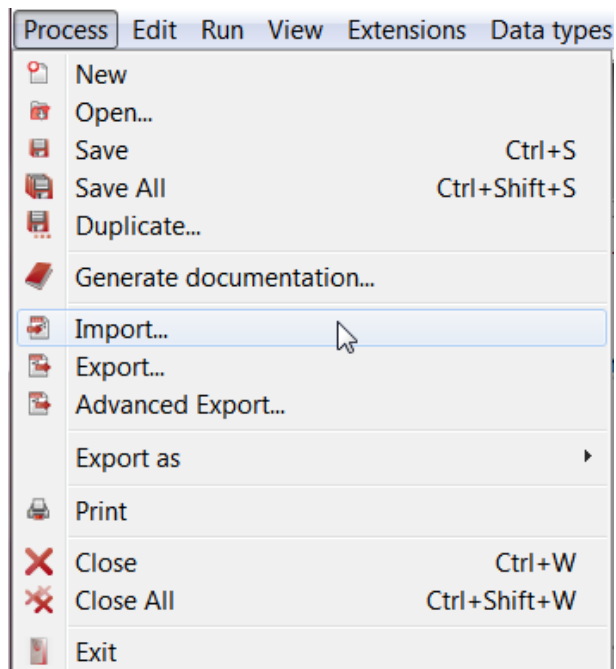


Figure 5. Import *MyTutorialProcessDiagram* from Menu bar



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**.

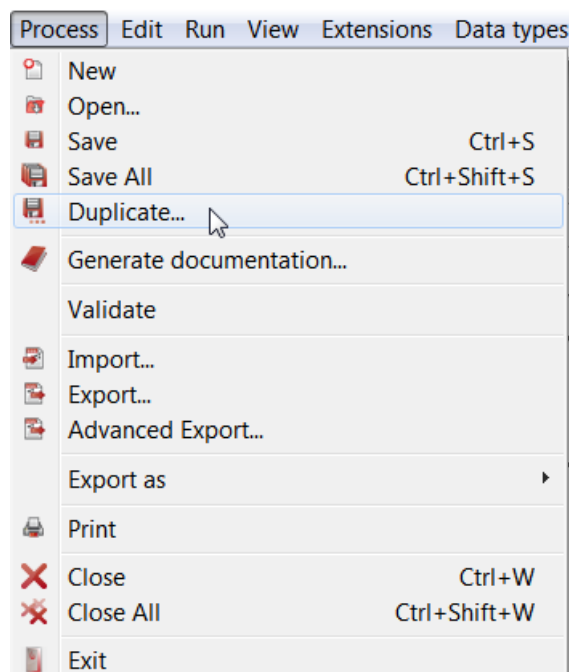


Figure 7. Duplicate the process diagram to save with a new version number

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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.

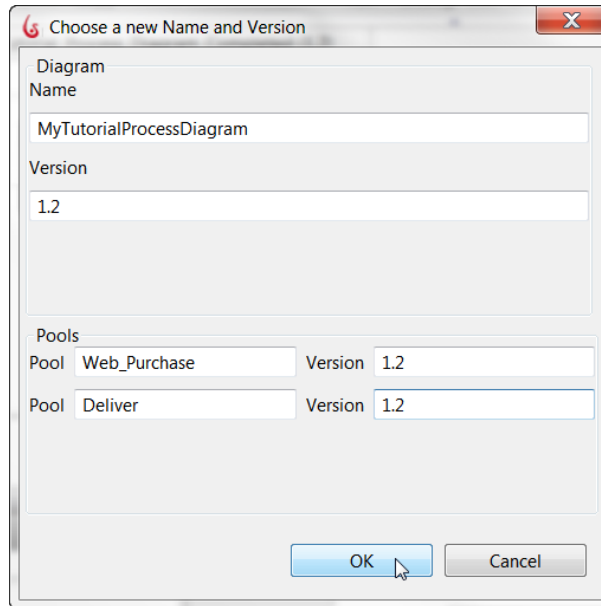


Figure 8. Change the version numbers on the process diagram and pools

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 [create this form](#), click on the pool *Web_Purchase* and go to its **Details panel > Application tab > Entry pageflow pane**. Click on **Add**.

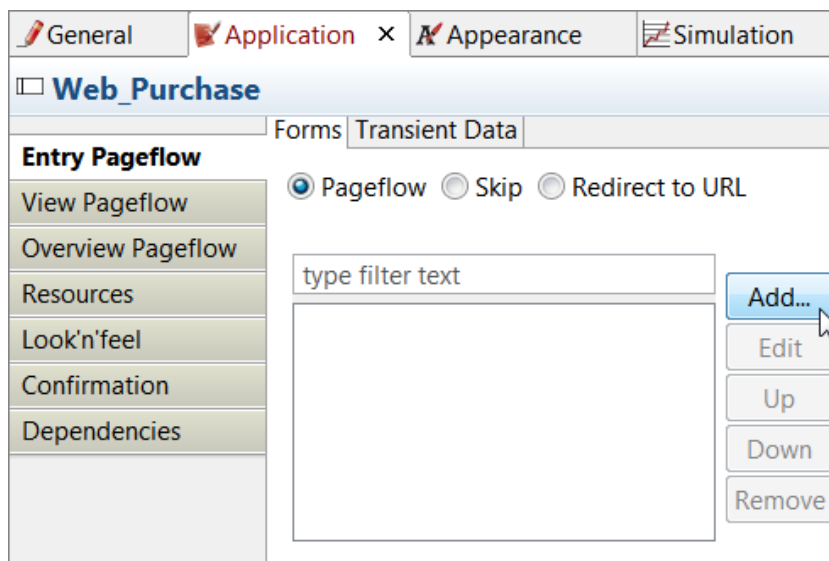


Figure 9. Add an entry form

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

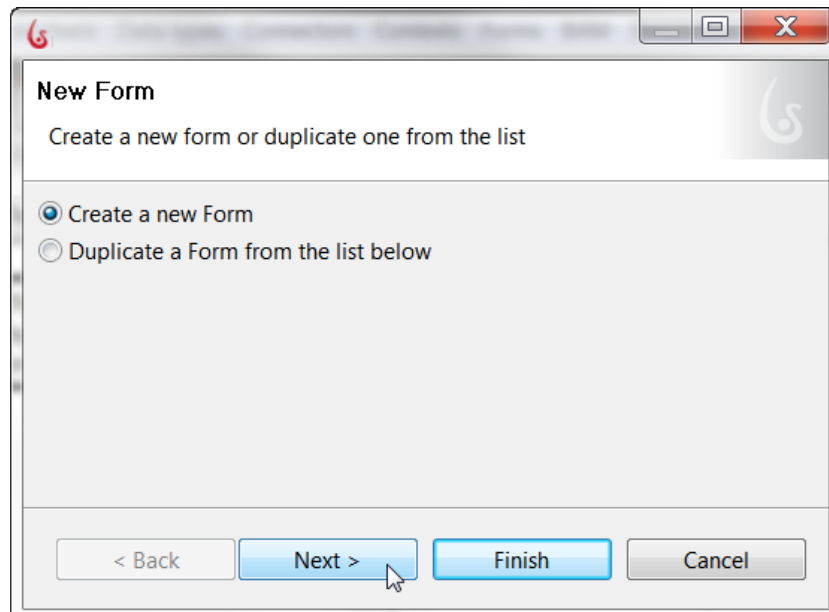
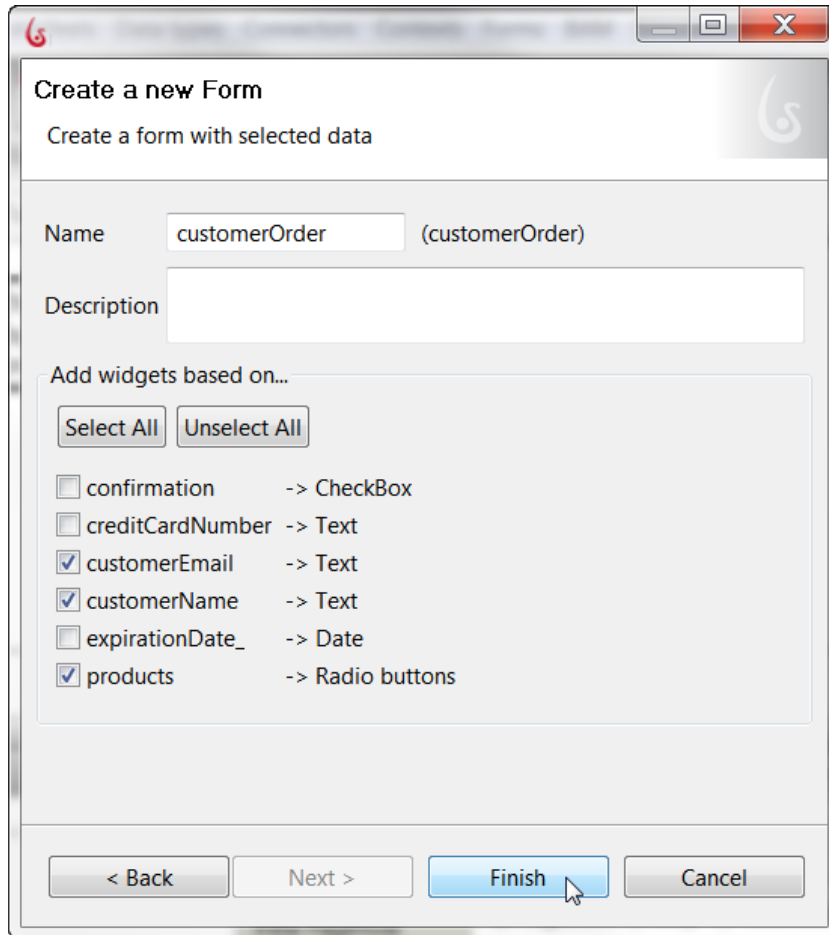


Figure 10. Create a new form

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.

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Create a new Form

Create a form with selected data

Name (customerOrder)

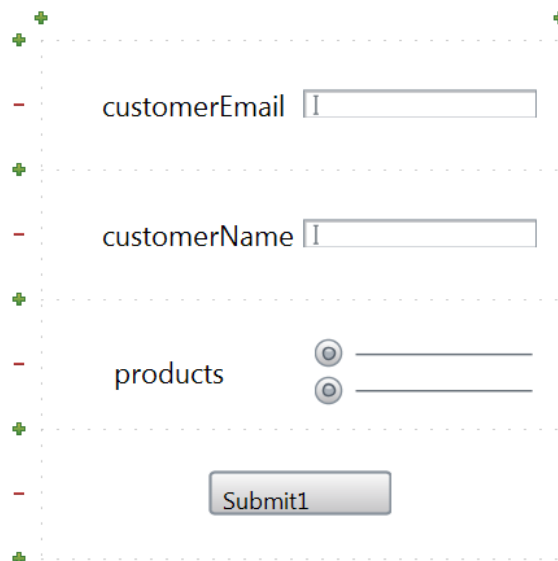
Description

Add widgets based on...

- confirmation -> CheckBox
- creditCardNumber -> Text
- customerEmail -> Text
- customerName -> Text
- expirationDate_ -> Date
- products -> Radio buttons

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

The [Form Builder](#) will appear, with an initial form with three fields to be customized.



customerEmail

customerName

products

Figure 12. Form in Form Builder

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

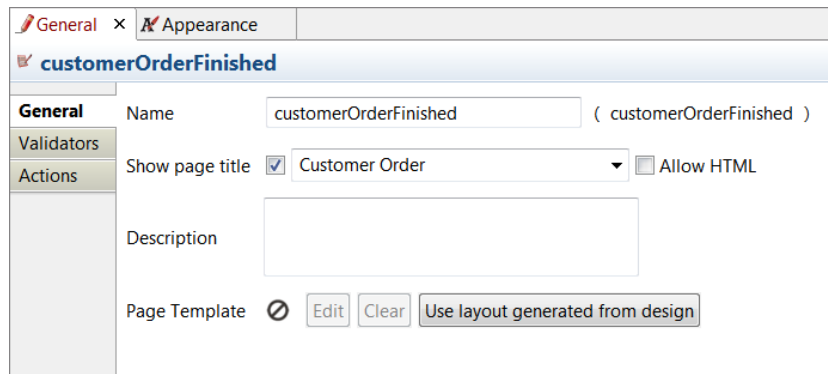


Figure 13. Change form page title

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.

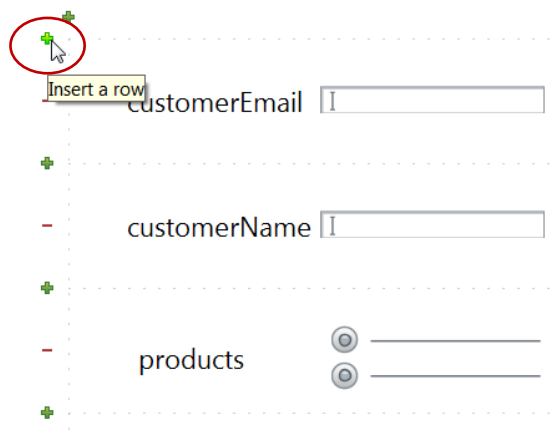


Figure 14. Add a row

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

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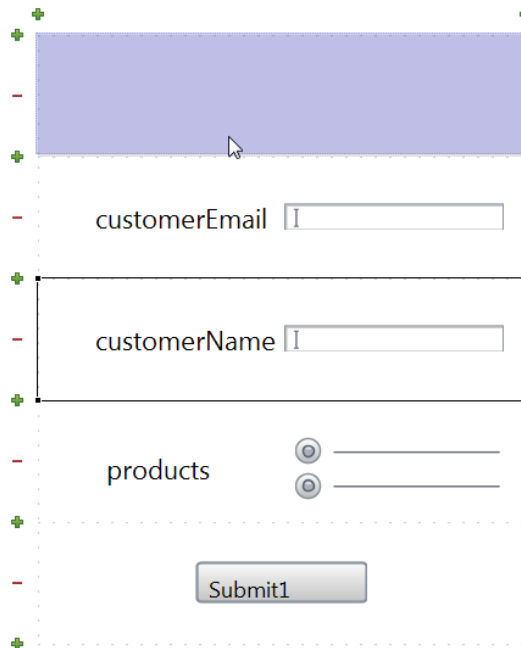


Figure 15. Move a form field widget

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

Delete the blank row by clicking on the red **-**.

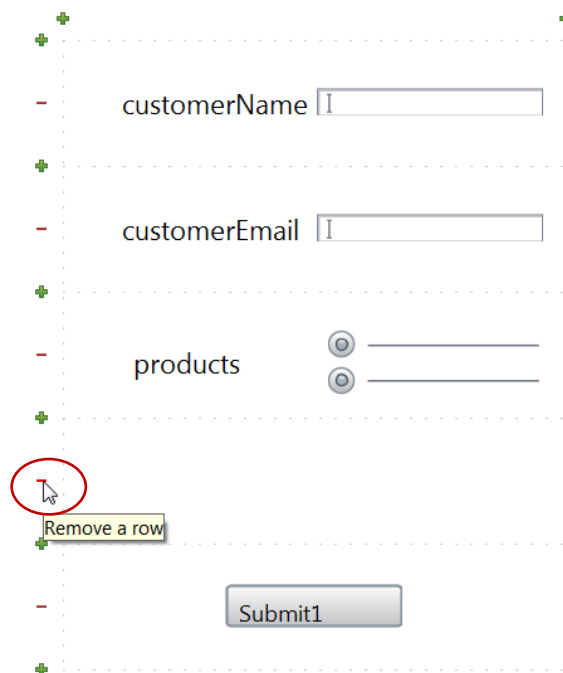


Figure 16. Remove a row

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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*.

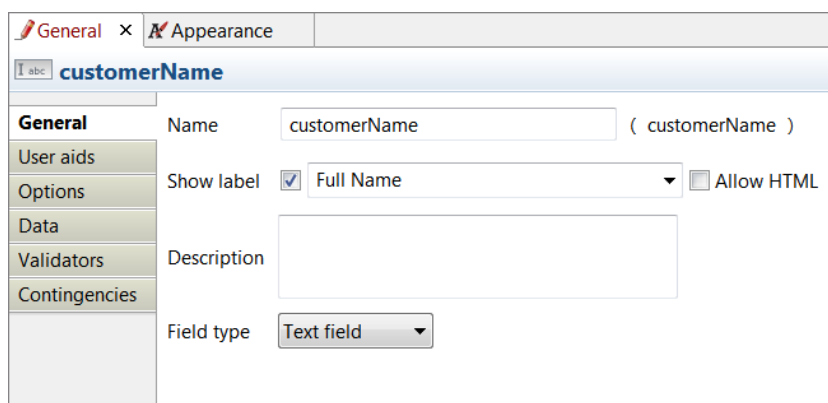


Figure 17. Change the label on another form page

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*.

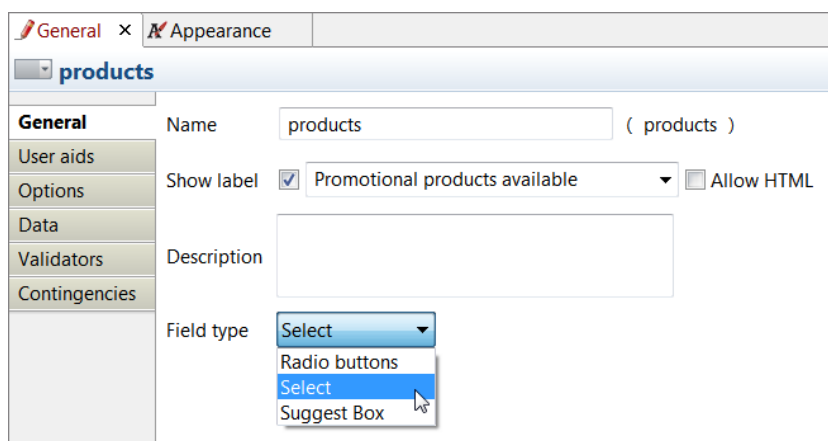


Figure 18. Change the field type

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*.

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The form now looks like this:

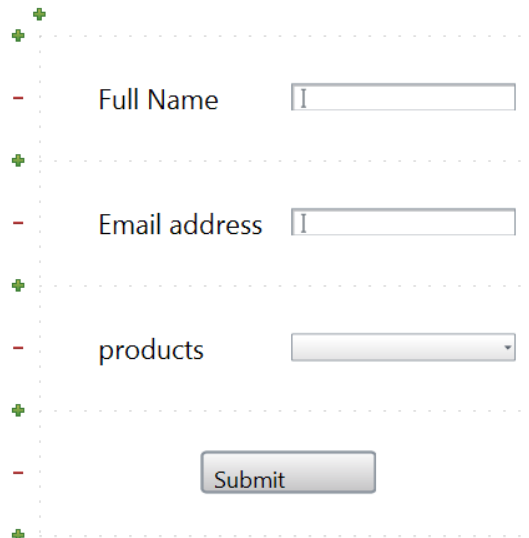


Figure 19. Customized form in Form Builder

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.

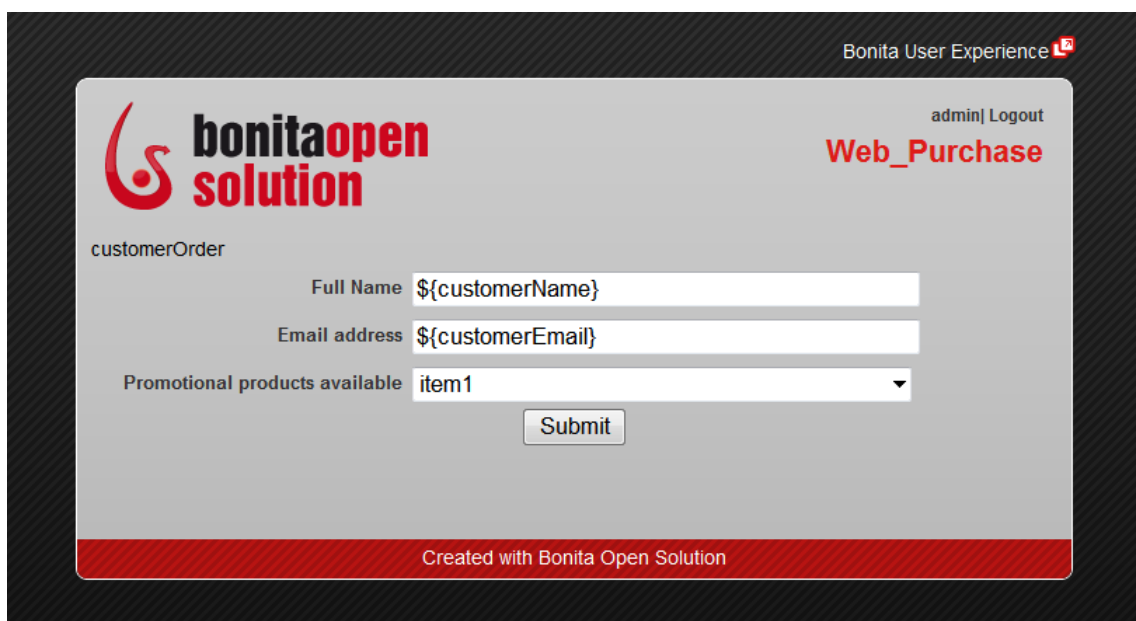


Figure 20. Preview a form

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.

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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:

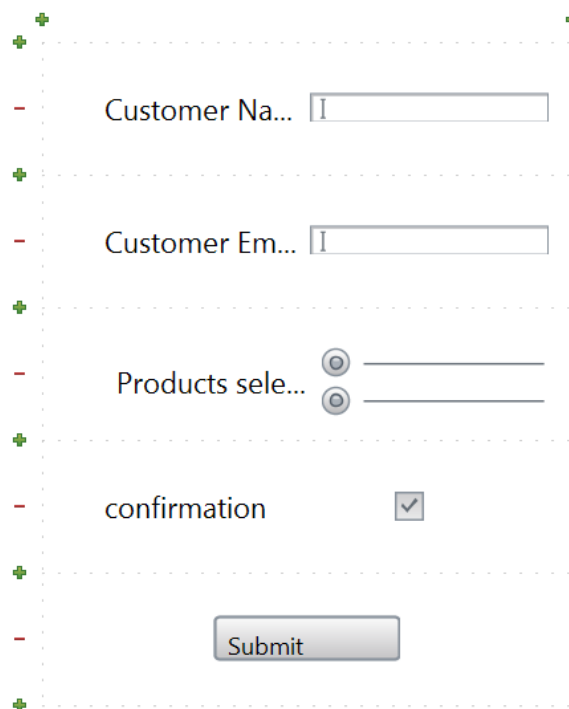


Figure 21. Re-order and re-name fields

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.)

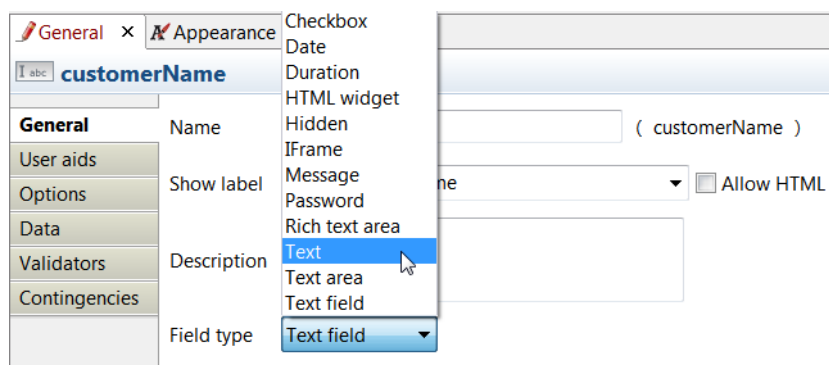


Figure 22. Change field type

Do the same for the *Customer email* field.

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

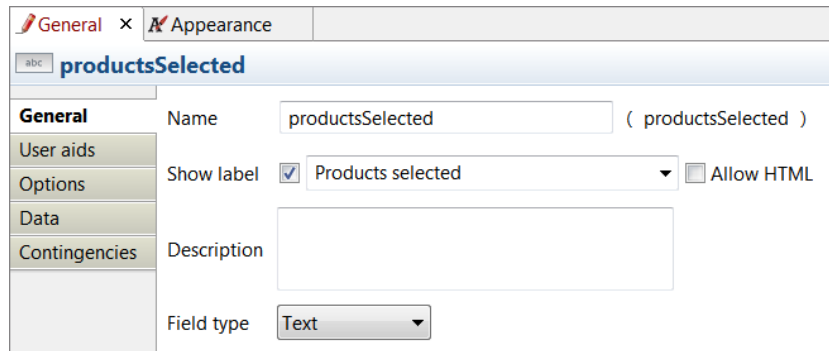
Create a new field for *Products selected*. Add a row, then go to the widget palette and drag and drop a text widget into place.

Figure 24. Add a text widget

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

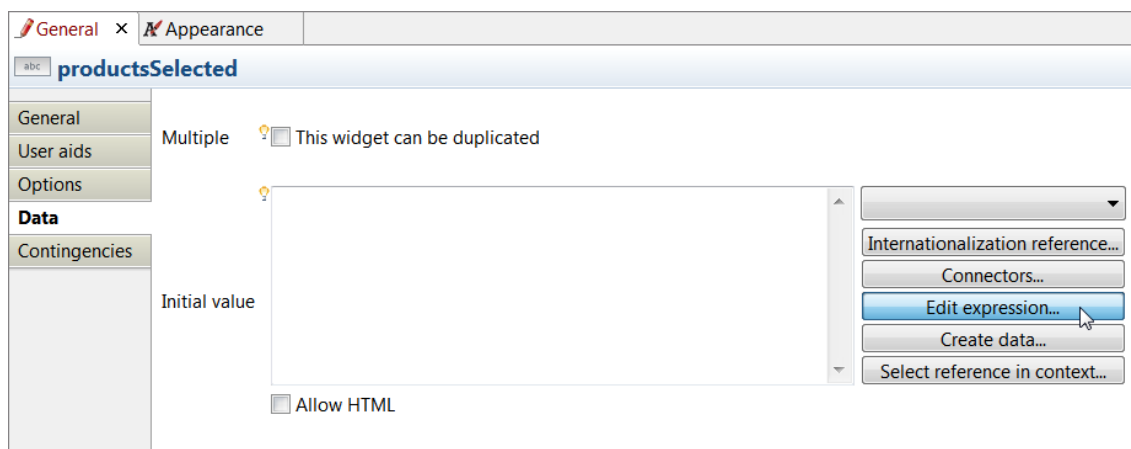


The screenshot shows the configuration panel for a widget named 'productsSelected'. The 'General' tab is active. The 'Name' field is set to 'productsSelected'. The 'Show label' checkbox is checked, and the label is 'Products selected'. The 'Field type' is set to 'Text'. Other tabs like 'User aids', 'Options', 'Data', and 'Contingencies' are visible but not active.

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**.



The screenshot shows the 'Data' pane of the configuration panel for 'productsSelected'. The 'Initial value' field is empty. To the right of this field is a vertical toolbar with several buttons: 'Internationalization reference...', 'Connectors...', 'Edit expression...' (highlighted with a mouse cursor), 'Create data...', and 'Select reference in context...'. The 'Multiple' checkbox is checked, and the 'Allow HTML' checkbox is unchecked.

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**.

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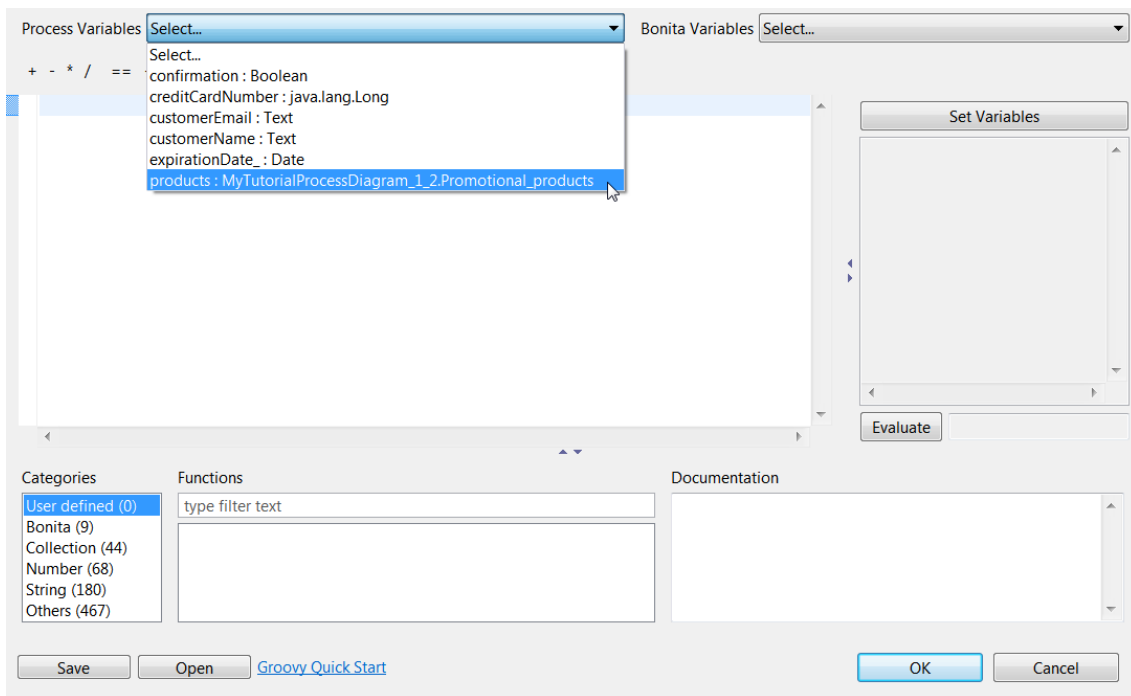


Figure 27. Choose variable for the expression for initial value

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

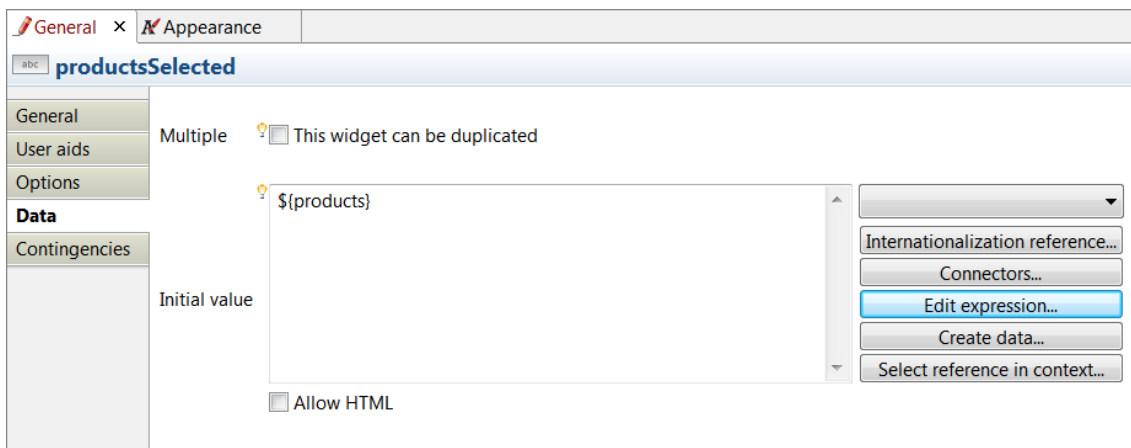


Figure 28. The text field will show the content of the `#{products}` variable

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.

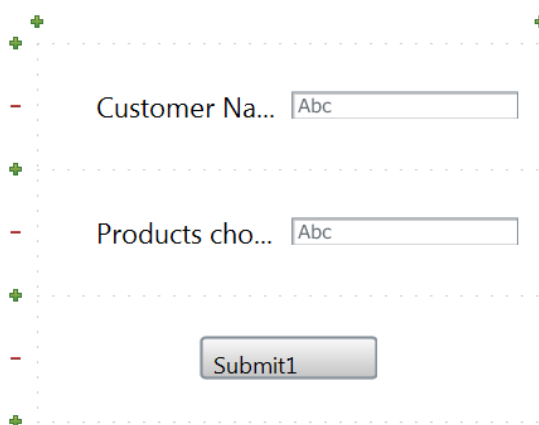
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Name the form `orderConfirmation`. Again the wizard proposes to create form field widgets (of the type noted next to the variable name) for all of the variable types defined in this process. Select only `customerName`. Click on **Finish** to continue.

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:



The screenshot shows a form design canvas with a dashed border. Inside, there are two text input fields. The first is labeled "Customer Na..." and contains the text "Abc". The second is labeled "Products cho..." and also contains "Abc". Below these fields is a button labeled "Submit1". Green plus signs are visible at the corners and midpoints of the dashed border, indicating a drag-and-drop interface.

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

[Create a two-page form](#) 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**.

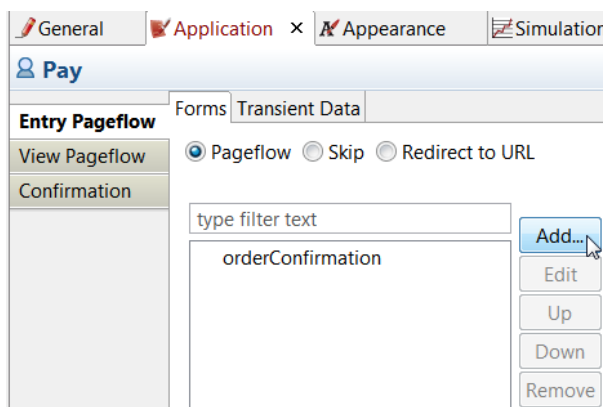


Figure 30. Add another page to a form

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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:

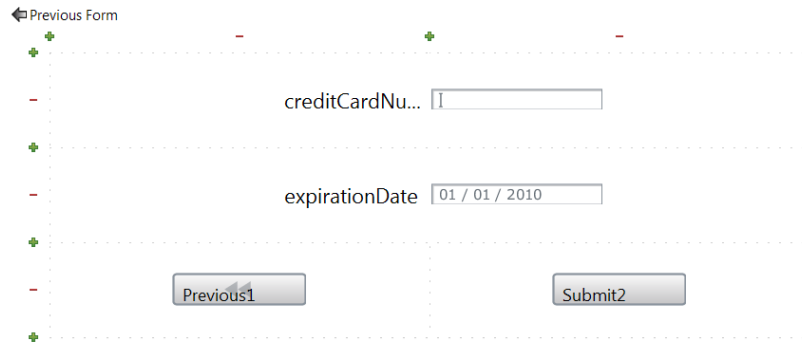


Figure 31. Second page of the form

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.

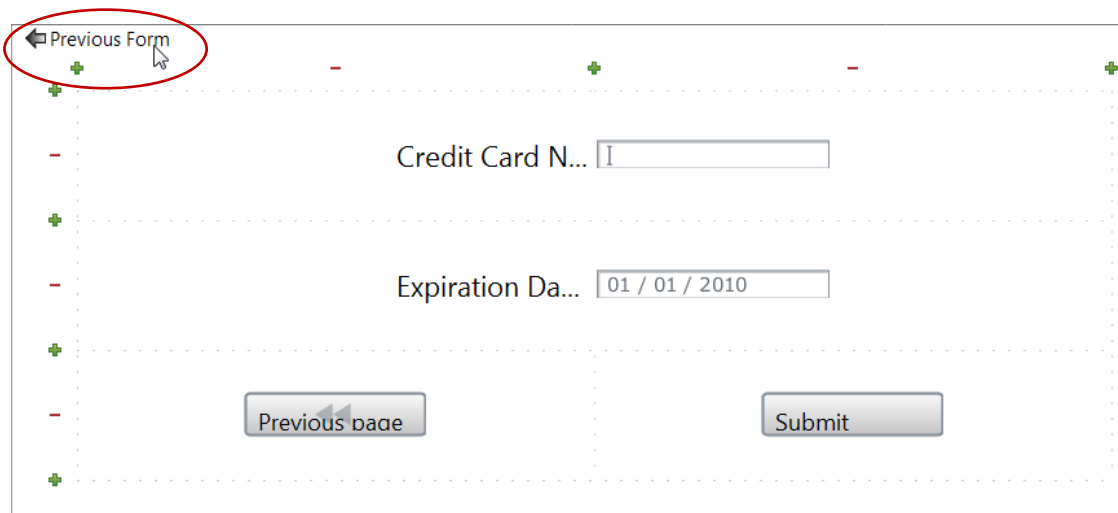
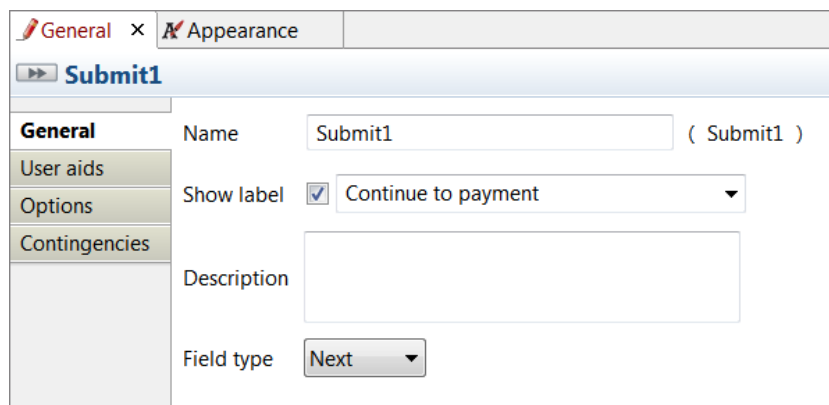


Figure 32. Complete page 2 and go back to page 1

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

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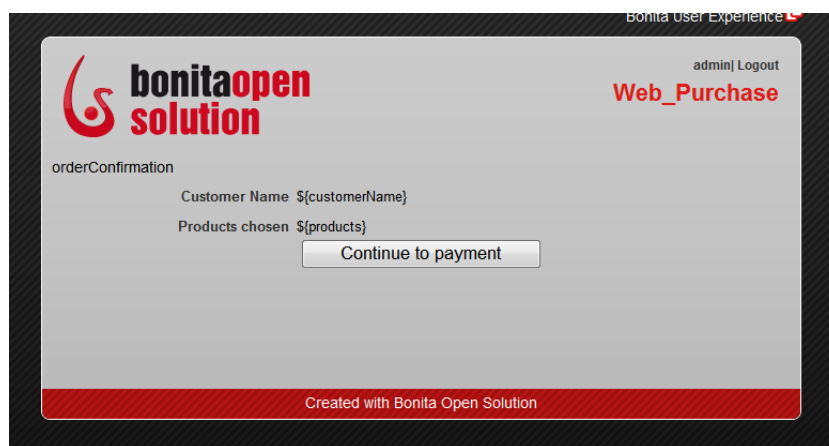
The screenshot shows the Bonita Open Solution designer interface. At the top, there are two tabs: 'General' and 'Appearance'. The 'Appearance' tab is selected. Below the tabs, there is a button labeled 'Submit1'. To the left of the main configuration area is a sidebar with several sections: 'General', 'User aids', 'Options', and 'Contingencies'. The 'General' section is currently active. It contains the following fields:

- Name:** Submit1 (Submit1)
- Show label:** Continue to payment
- Description:** (empty text box)
- 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.



The screenshot shows the Bonita Open Solution preview window. The title bar reads 'Bonita User Experience'. The main content area displays the 'orderConfirmation' form. At the top left is the 'bonitaopen solution' logo. At the top right, it says 'admin| Logout' and 'Web_Purchase'. The form content includes:

- orderConfirmation
- Customer Name: \${customerName}
- Products chosen: \${products}
- Continue to payment button

At the bottom of the preview window, there is a red bar with the text '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.

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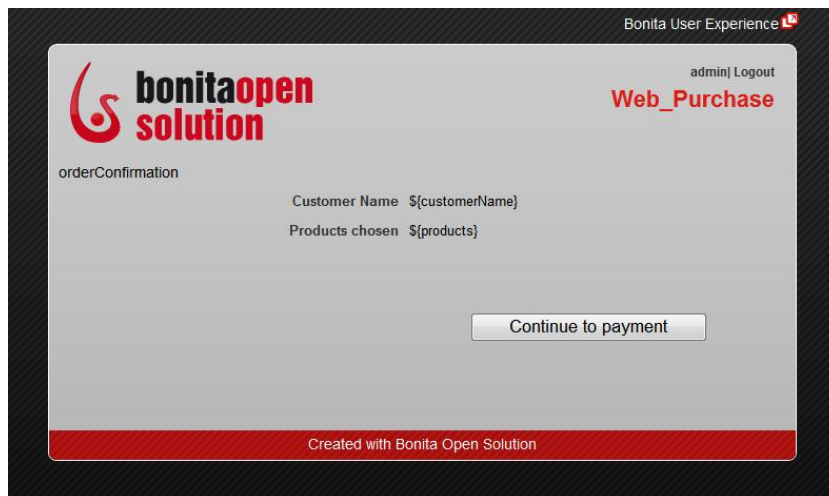


Figure 35. Change layout of fields by modifying grid

3.2.3 Check off User Guidance

To apply the [User Guidance checklist](#), go to the Cool bar and click on **User Guidance**.

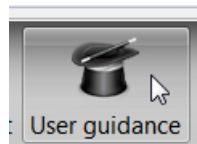


Figure 36. Select User Guidance to see the checklist

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*.

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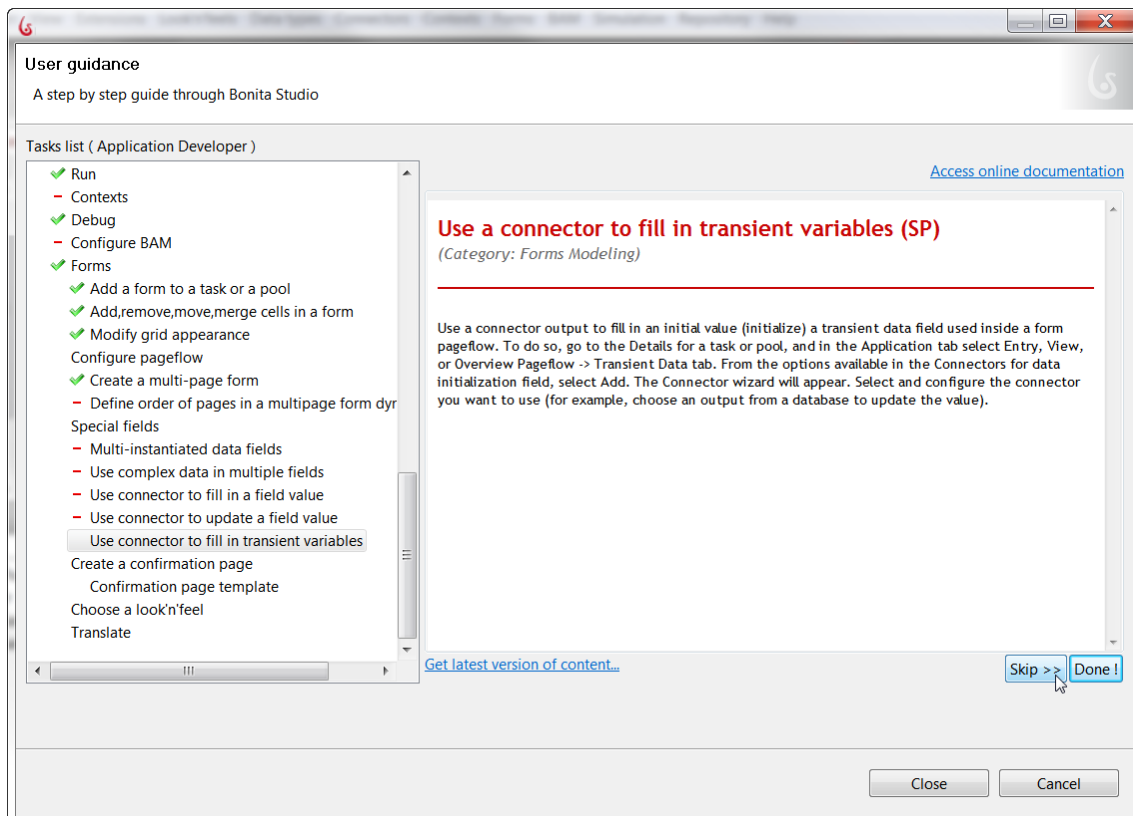


Figure 37. User Guidance checklist

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:

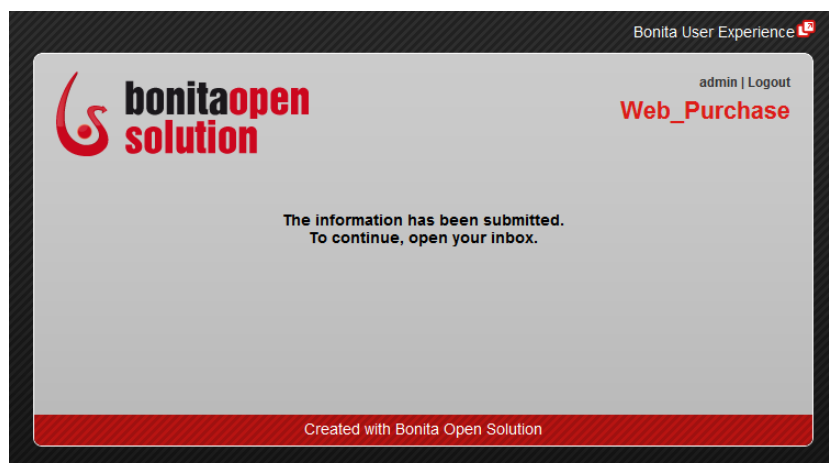


Figure 38. Default confirmation message when instantiation form is completed

[To change this confirmation message](#), 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.

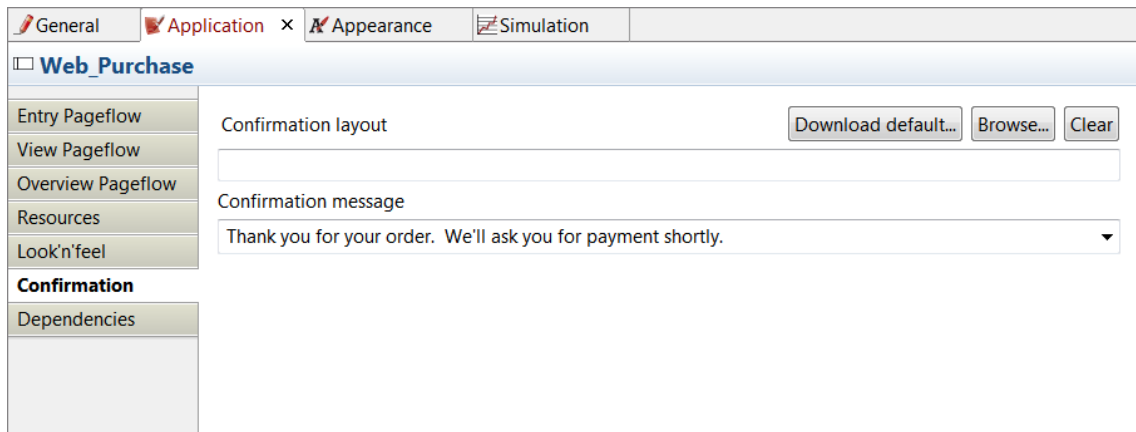


Figure 39. Add a custom confirmation message

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

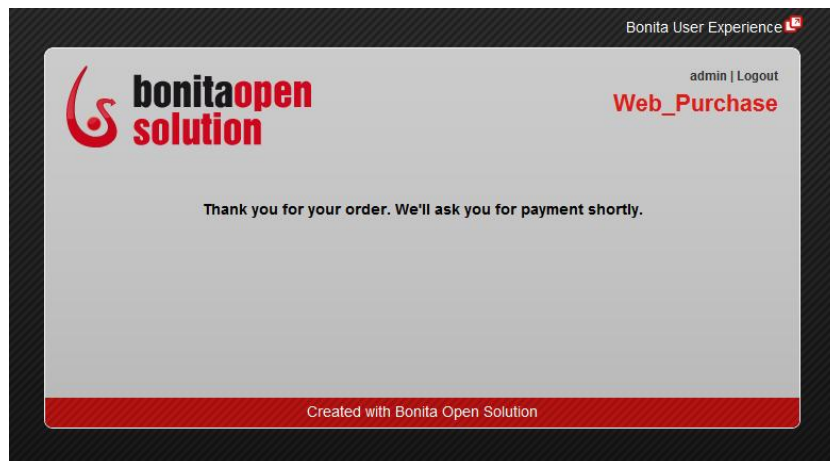


Figure 40. Custom confirmation message

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*.

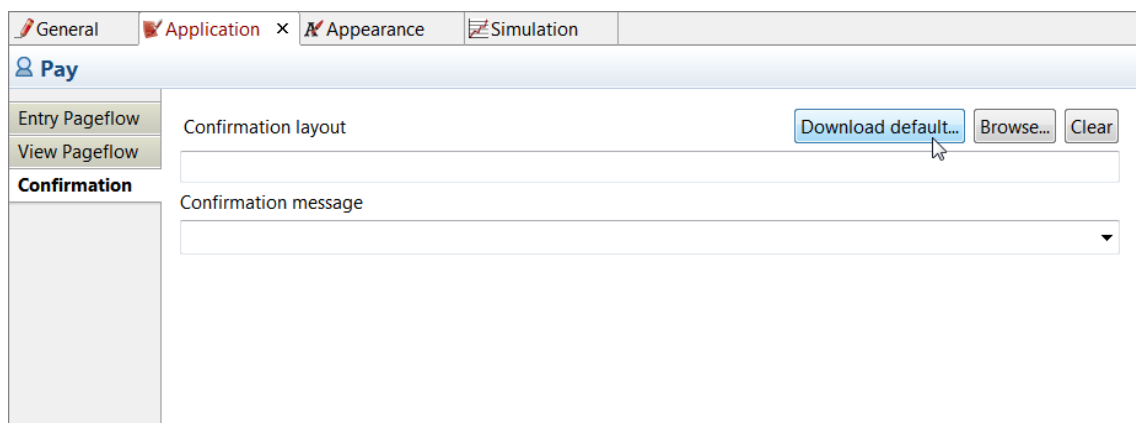


Figure 41. Add a confirmation page template

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When the wizard appears, the hidden file `bonita_default_confirm.html` will appear. Click on **Save** to save it to a target folder of your choice

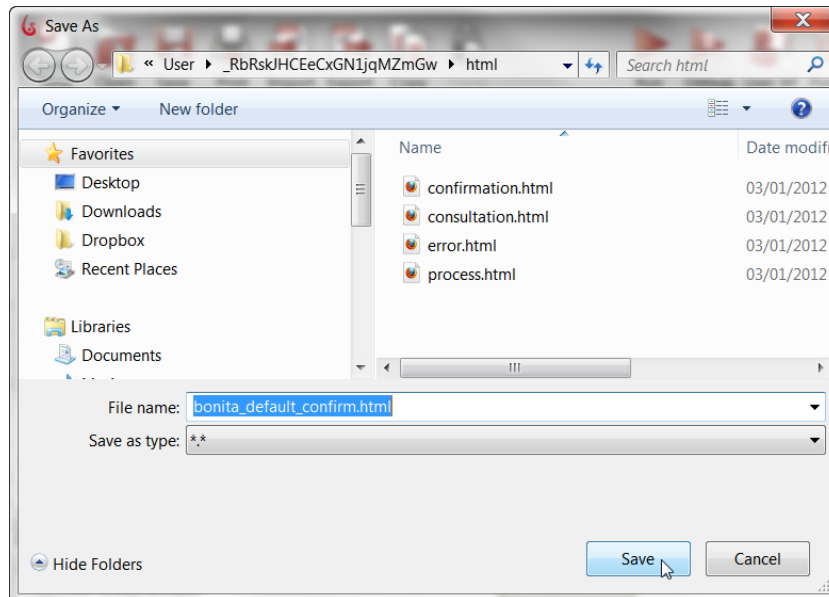


Figure 42. Download and re-import a default template

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 [logged in automatically](#) as *Admin*.)

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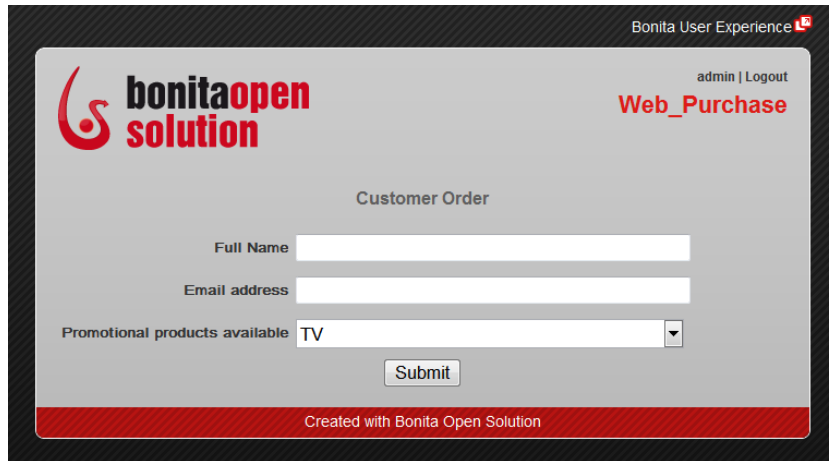


Figure 43. Customer order form

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

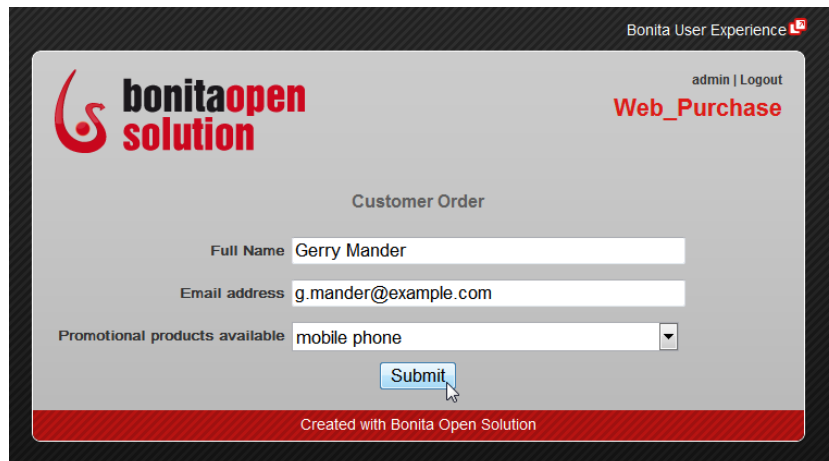


Figure 44. Complete the customer order form

The confirmation message appears.

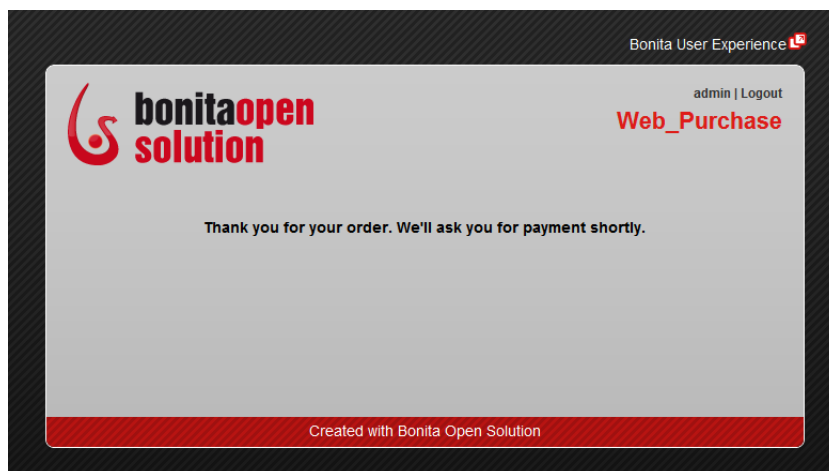


Figure 45. Confirmation message after customer submits order

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

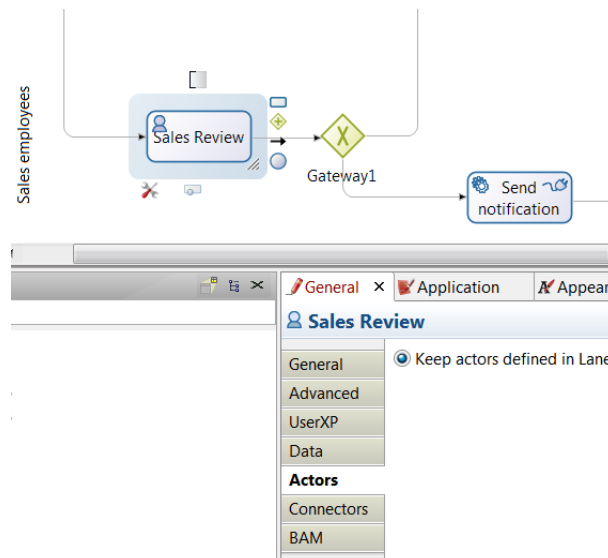


Figure 46. Reminder: Actors assigned to *Sales Review*

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

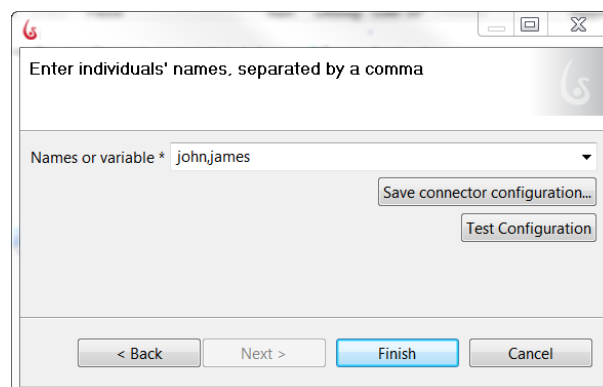


Figure 47. Reminder: Sales employees are *john* and *james*

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

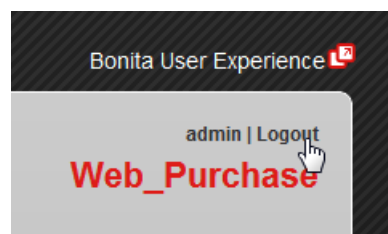


Figure 48. Log out of Bonita User Experience

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

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Figure 49. Log in as *john*

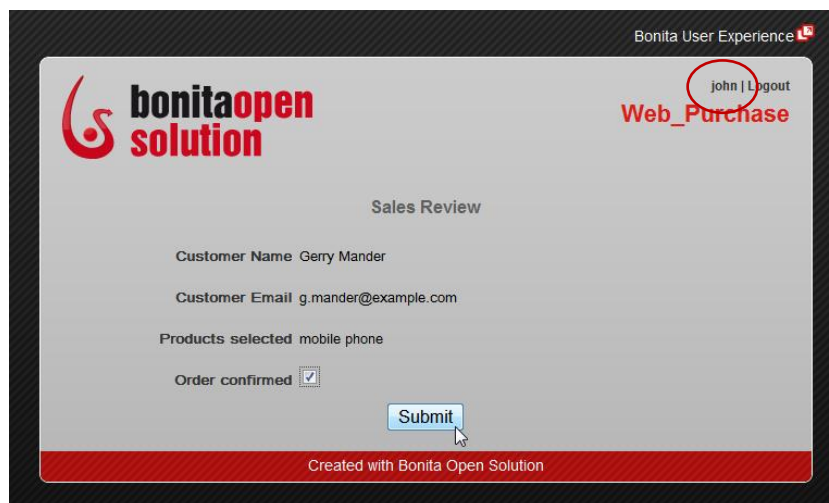


Figure 50. Complete Sales Review form

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**.

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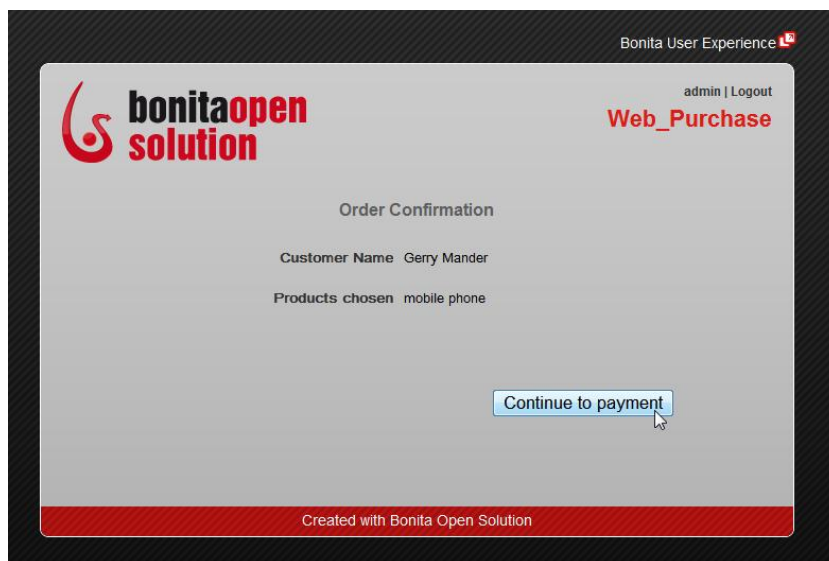


Figure 51. First page of two-page form

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

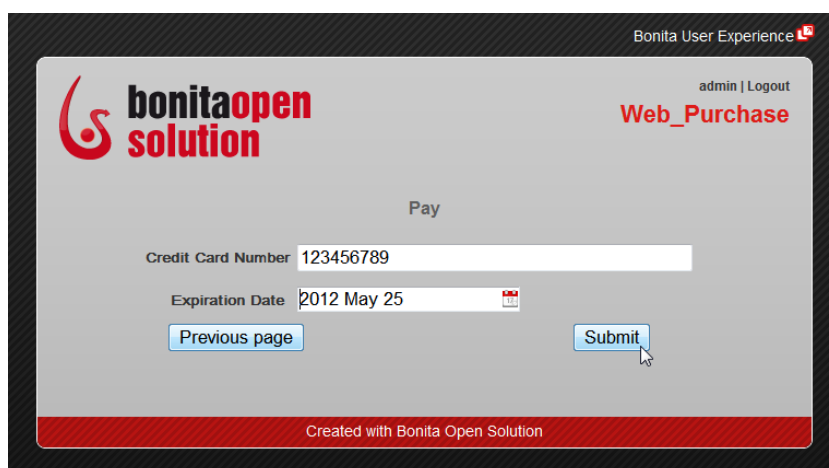


Figure 52. Second page of two-page form

The customized confirmation form for this sequence appears.

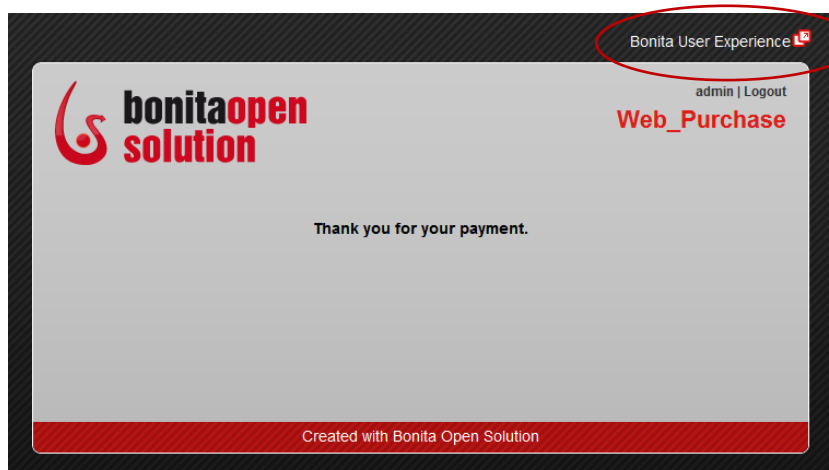


Figure 53. Customized confirmation message

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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.

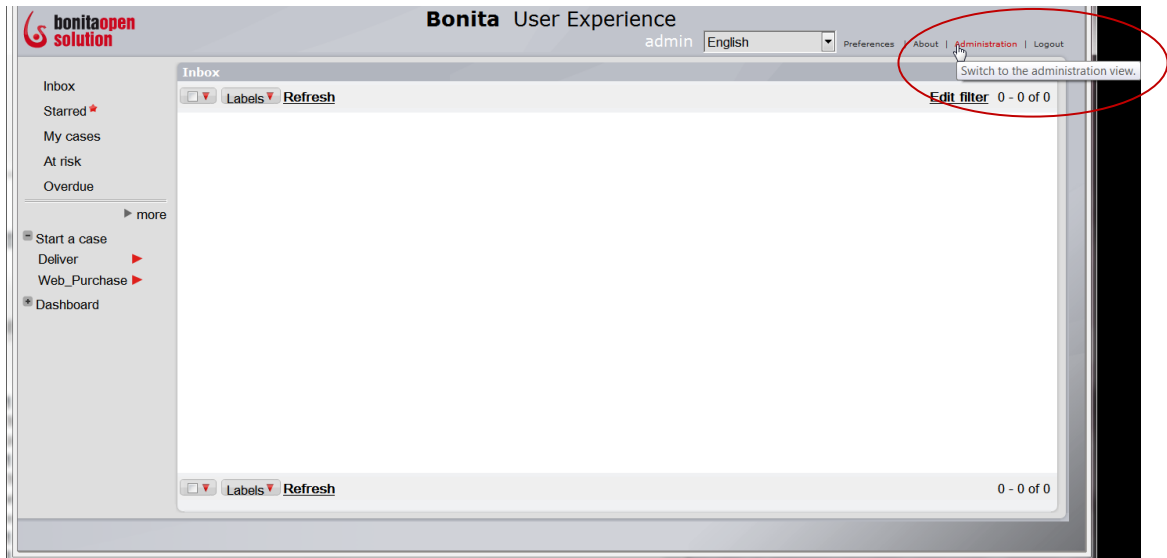


Figure 54. Bonita User Experience inbox, User View

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

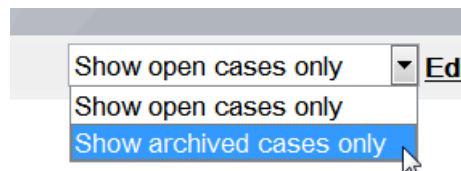


Figure 55. Show archived cases in Administration view

The process *Web_Purchase* shows in the list of cases as a completed process.

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

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

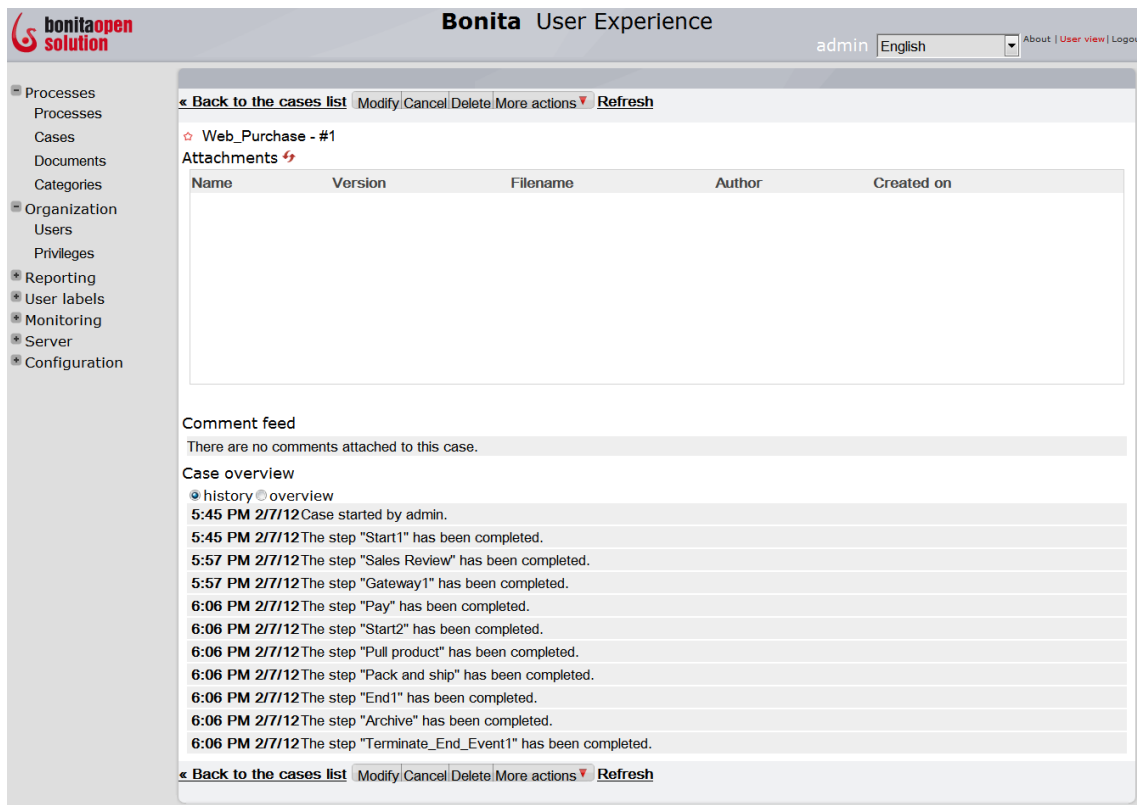


Figure 57. Completed process

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

[Change the default web form look'n'feel](#) 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**.

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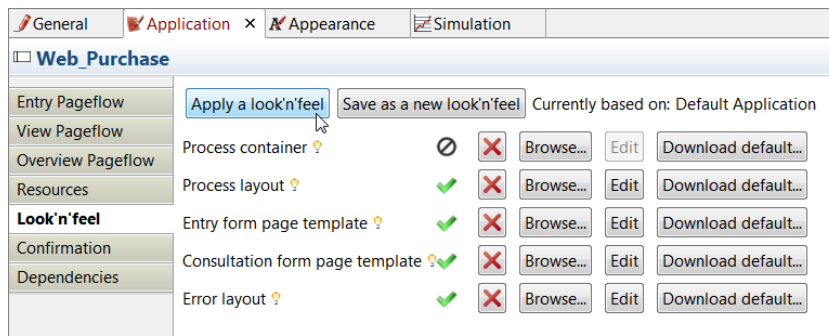


Figure 58. Apply a new look'n'feel

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**.

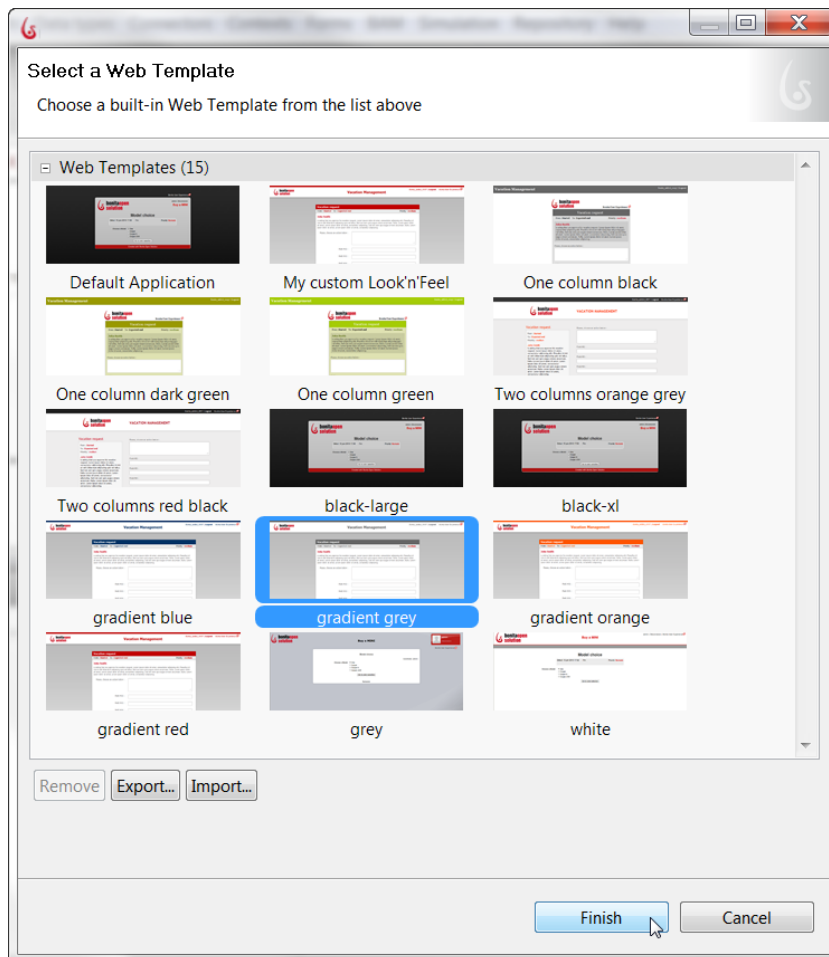


Figure 59. Select a different look'n'feel to apply

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

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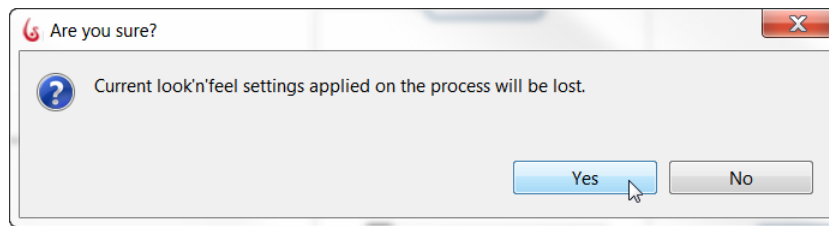


Figure 60. Confirm application of a new look'n'feel

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

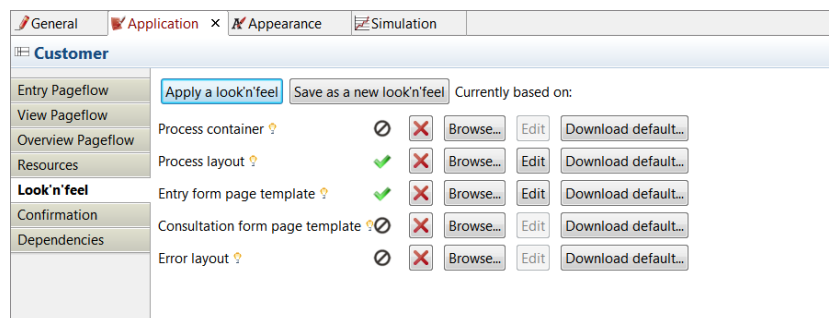


Figure 61. New look'n'feel will apply to forms

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

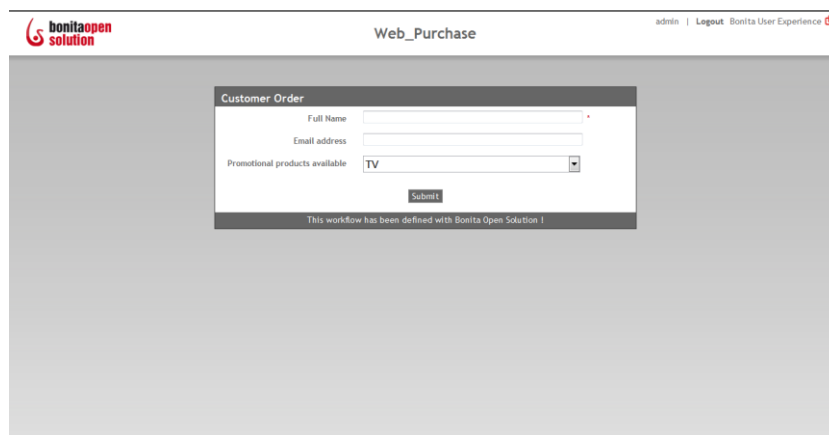


Figure 62. Form appears in new look'n'feel

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**.

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- 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.)

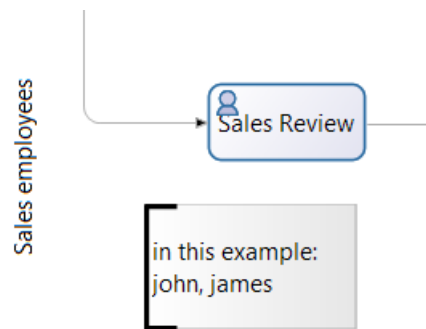


Figure 63. Add an annotation

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>

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Bug Tracker, Source Code

Check out our [Bug Tracker, Source Code](#).

<http://www.bonitasoft.org/index.php>

Feedback on this tutorial, or on documentation in general

Submit an issue on [documentation feedback](#).

http://www.bonitasoft.org/bugs/bug_report_advanced_page.php

More information

For more information, contact us at www.bonitasoft.com

<http://www.bonitasoft.com/company/contact.php>.

Have fun with Bonita!