



**bonita****soft**

*open your processes*

## **Bonita Open Solution**

**Version 5.1**

## **QuickStart Guide**

**Rev 1**

## Bonita Open Solution Version 5.1 QuickStart Guide Rev 1

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## Welcome to Bonita Open Solution!

Download Bonita Open Solution 5.1: [www.bonitasoft.com/products/downloads.php](http://www.bonitasoft.com/products/downloads.php)

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

### Download, install, and launch Bonita Open Solution 5.1

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 (if you have not installed a shortcut icon on your desktop),
- 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

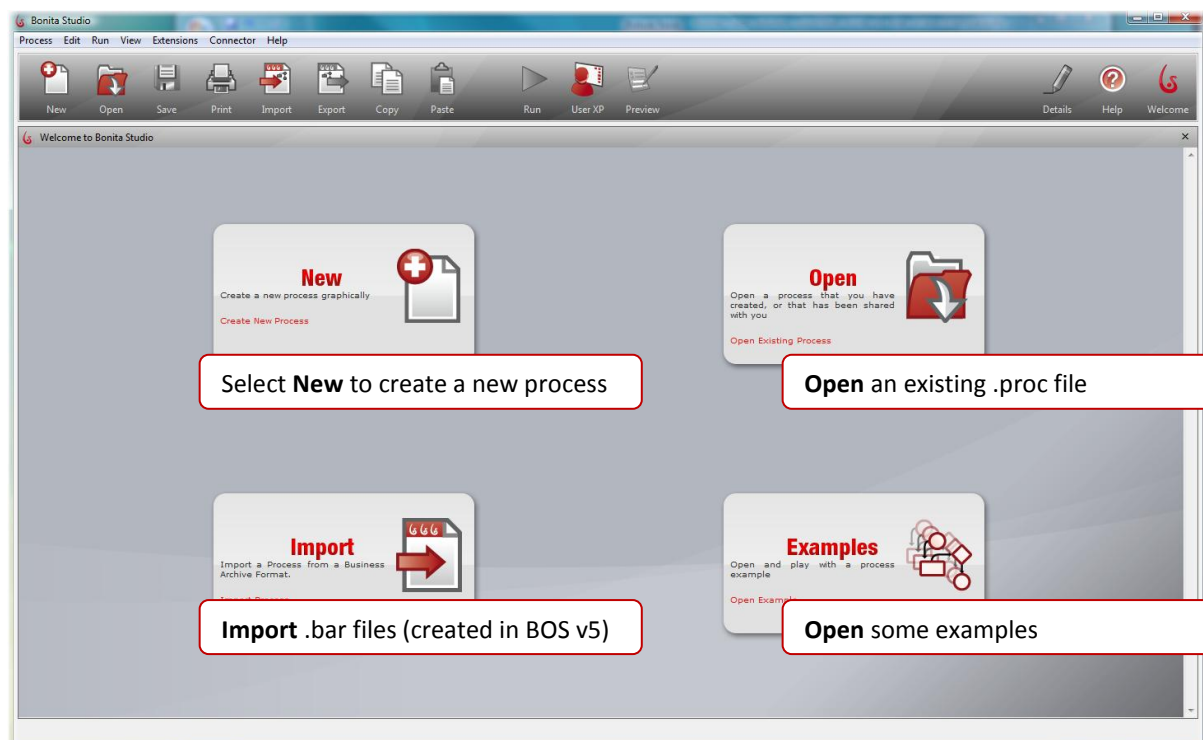



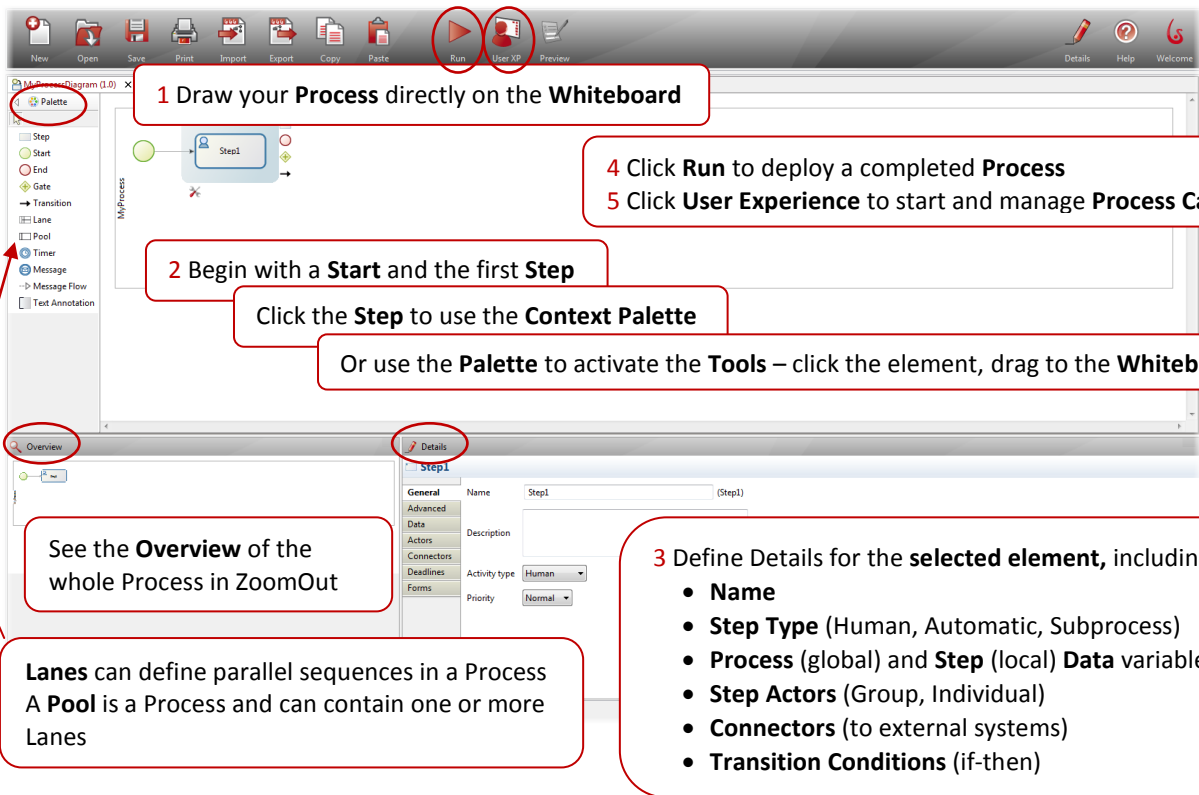
Figure 1. Welcome to **Bonita Studio**

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 Rev 1

## Bonita Studio

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



The screenshot shows the Bonita Studio interface with several callouts and numbered instructions:

- 1 Draw your Process directly on the Whiteboard**: Points to the main workspace where a process diagram is being drawn.
- 2 Begin with a Start and the first Step**: Points to the 'Start' and 'Step1' elements in the diagram.
- Click the Step to use the Context Palette**: Points to the 'Step1' element.
- Or use the Palette to activate the Tools – click the element, drag to the Whiteboard**: Points to the 'Palette' on the left side of the interface.
- 4 Click Run to deploy a completed Process**: Points to the 'Run' button in the top toolbar.
- 5 Click User Experience to start and manage Process Cases**: Points to the 'User XP' button in the top toolbar.
- See the Overview of the whole Process in ZoomOut**: Points to the 'Overview' button in the bottom left.
- 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)

**Lanes** can define parallel sequences in a Process  
A **Pool** is a Process and can contain one or more Lanes

Figure 2. Bonita Studio ready to design a new Process

### Bonita User Experience:

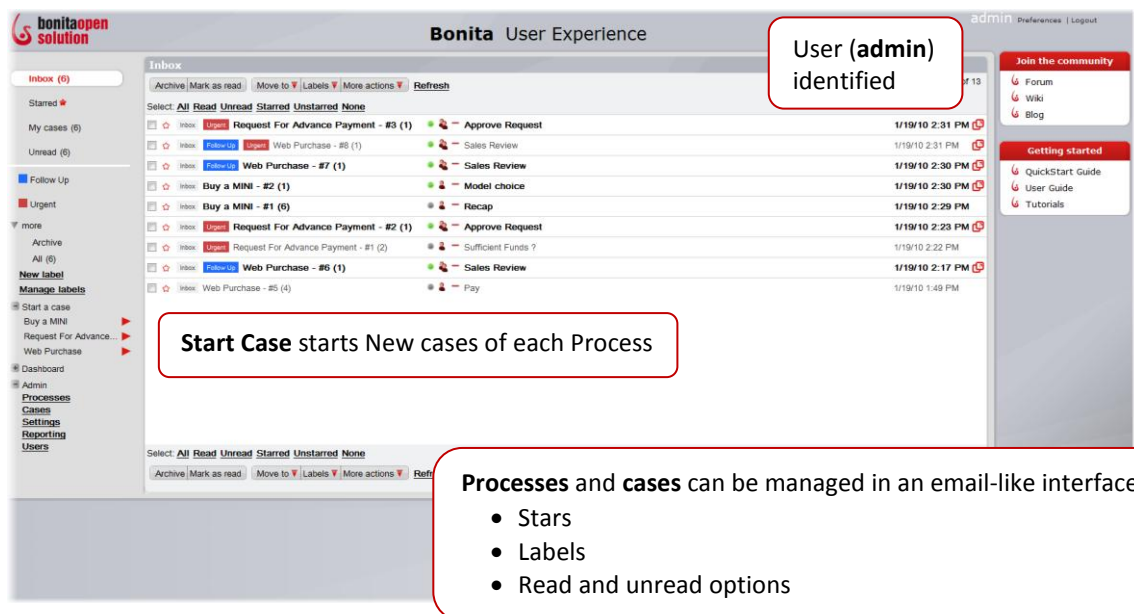


Figure 3. **Bonita User Experience** provides an in-box to manage Processes and Cases

## 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:

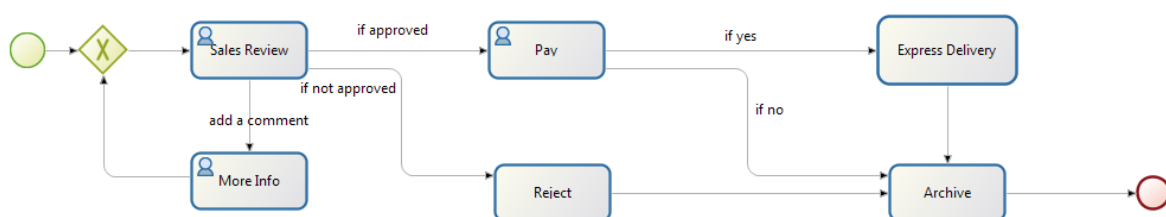


Figure 4. Completed **Web Purchase** Process

(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.

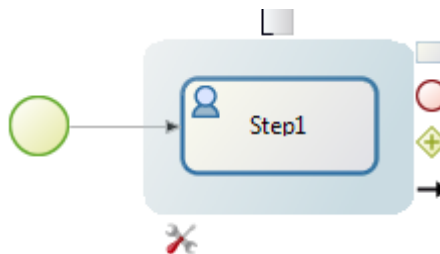
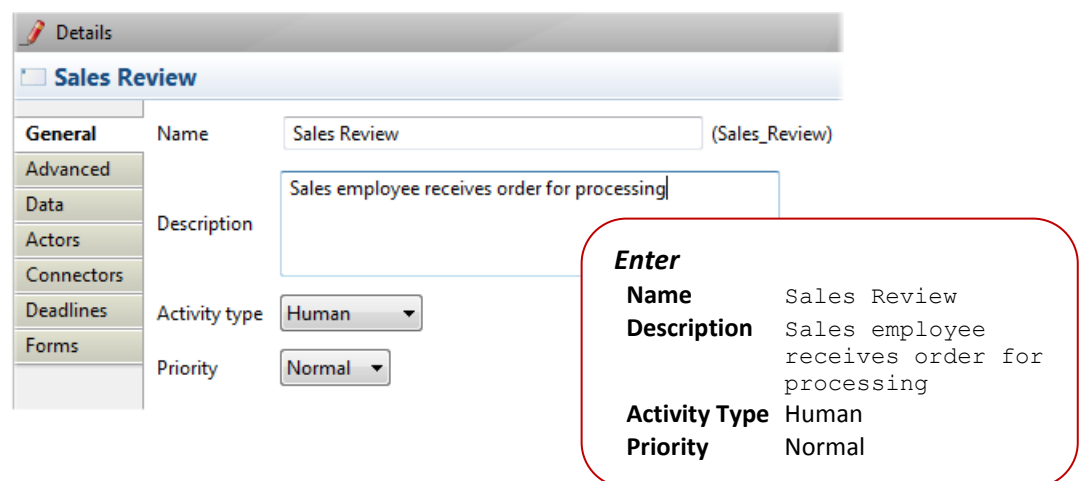


Figure 5. Begin a new Process with a Start and a Step

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



**Details**

**Sales Review**

<b>General</b>	Name	Sales Review (Sales_Review)
Advanced	Description	Sales employee receives order for processing
Data	Activity type	Human
Actors	Priority	Normal
Connectors		
Deadlines		
Forms		

**Enter**

<b>Name</b>	Sales Review
<b>Description</b>	Sales employee receives order for processing
<b>Activity Type</b>	Human
<b>Priority</b>	Normal

Figure 6. Enter General Details for **Sales Review**



Before adding the next Steps, define who will take action in this Step - the Actor(s). (For the purpose of this tutorial, the Actor(s) defined for 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**:

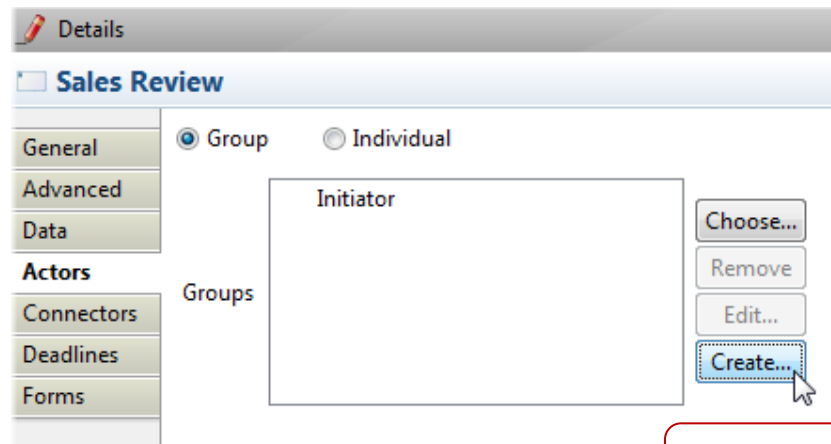


Figure 7. Create a Group of Actors for **Sales Review**

Select  
Group and *Create*

Complete the wizards:

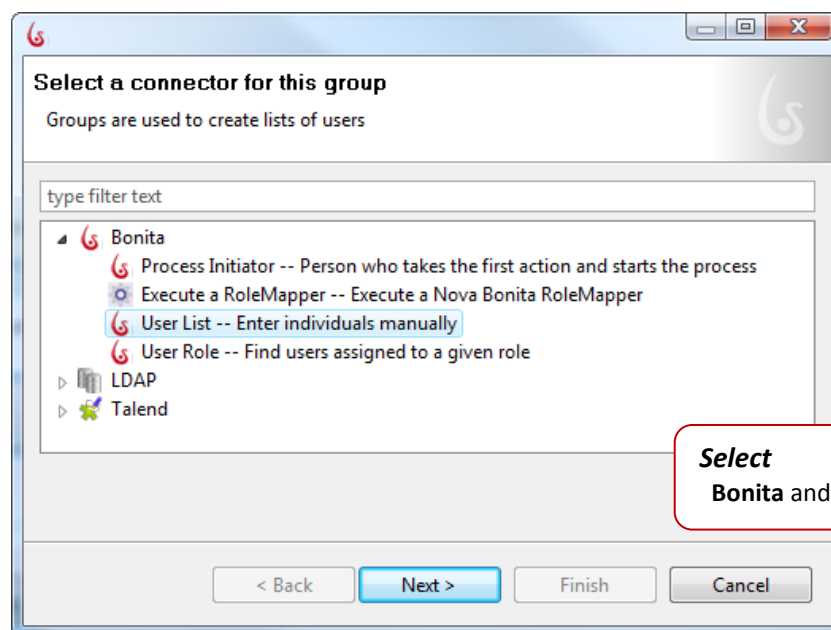


Figure 8. Select the option to manually enter names for a User List

Select  
Bonita and User List



**User List**

**Set the name of this group**  
A group identifies a list of individuals who can carry out this task

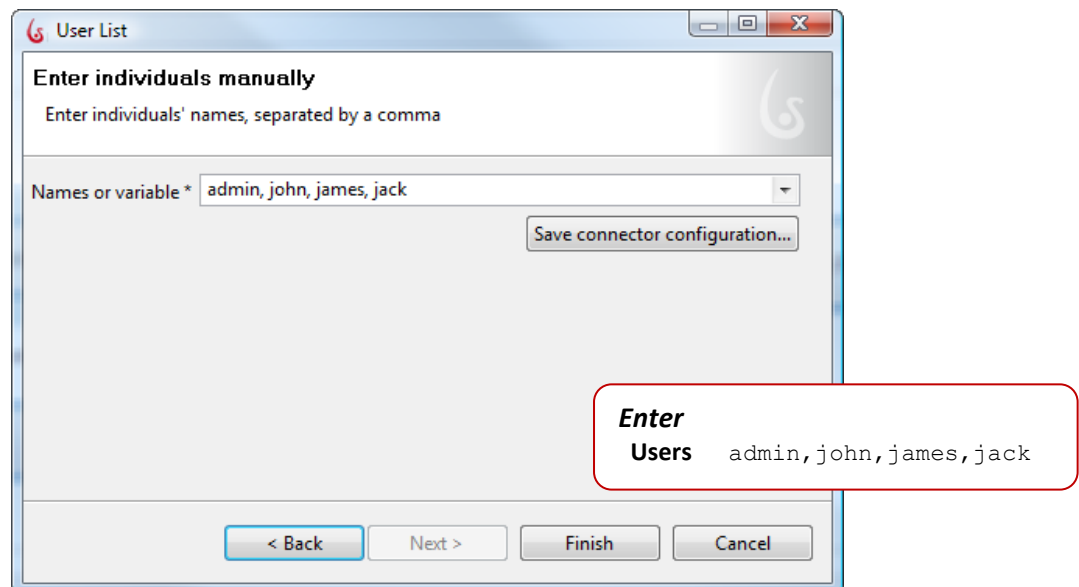
Name \*   
( Sales\_Employees )

Description

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

< Back Next > Finish Cancel

Figure 9. Name the Group



**User List**

**Enter individuals manually**  
Enter individuals' names, separated by a comma

Names or variable \*

Save connector configuration...

**Enter**  
**Users** admin, john, james, jack

< Back Next > Finish Cancel

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.

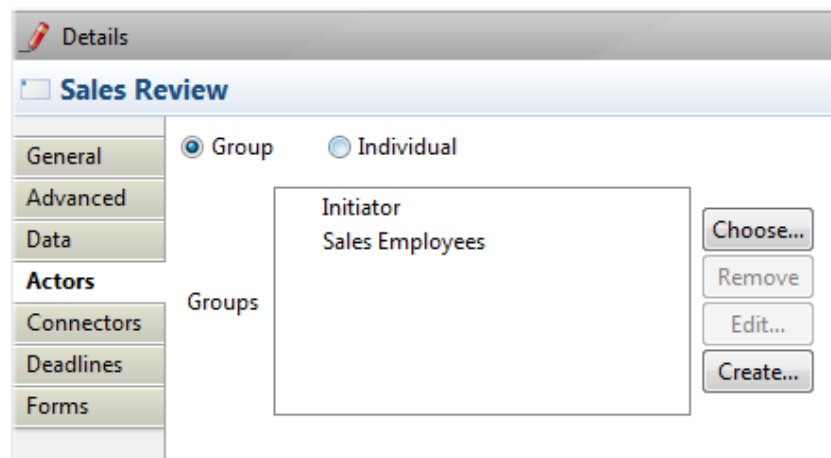


Figure 11. The newly created Group shows up in the Groups list for the **Sales Review** Step

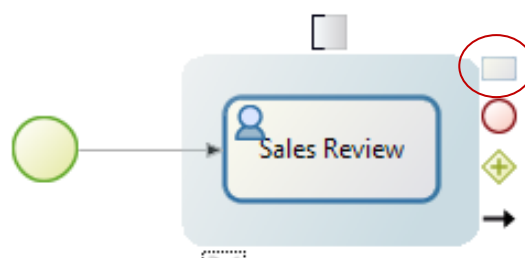
You'll come back to this Step later to add additional Details.

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.



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

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:

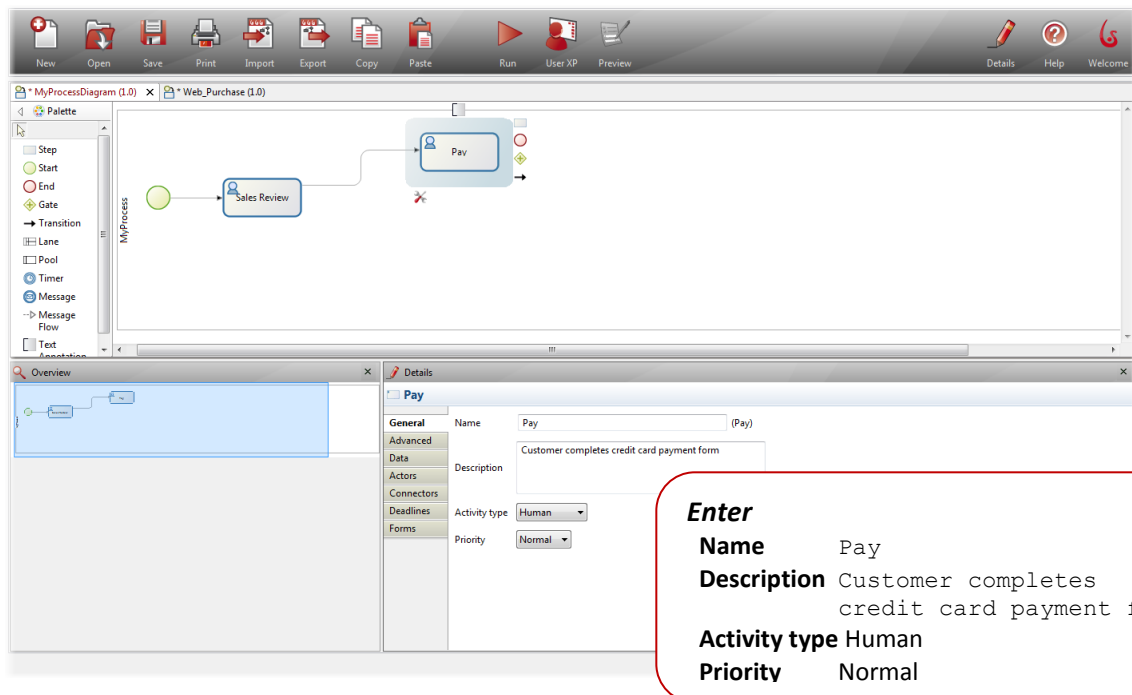


Figure 13. Name a new Step and enter its General Details

Click on **Actors** to define:

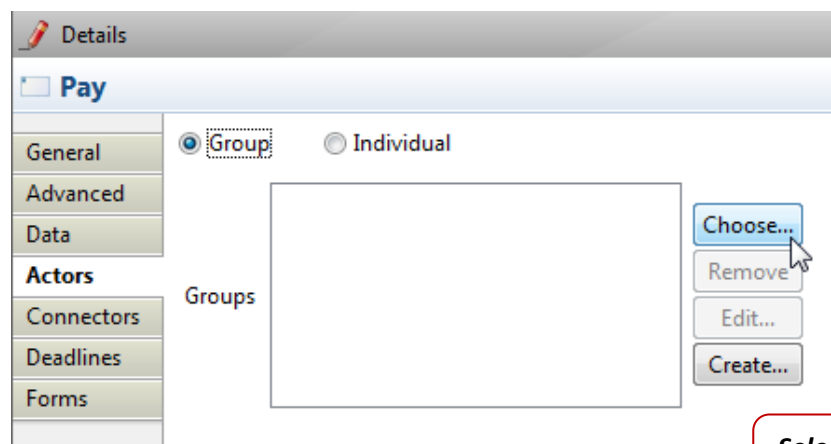


Figure 14. Define the Actors for this Step

**Select**  
**Group** and **Choose**

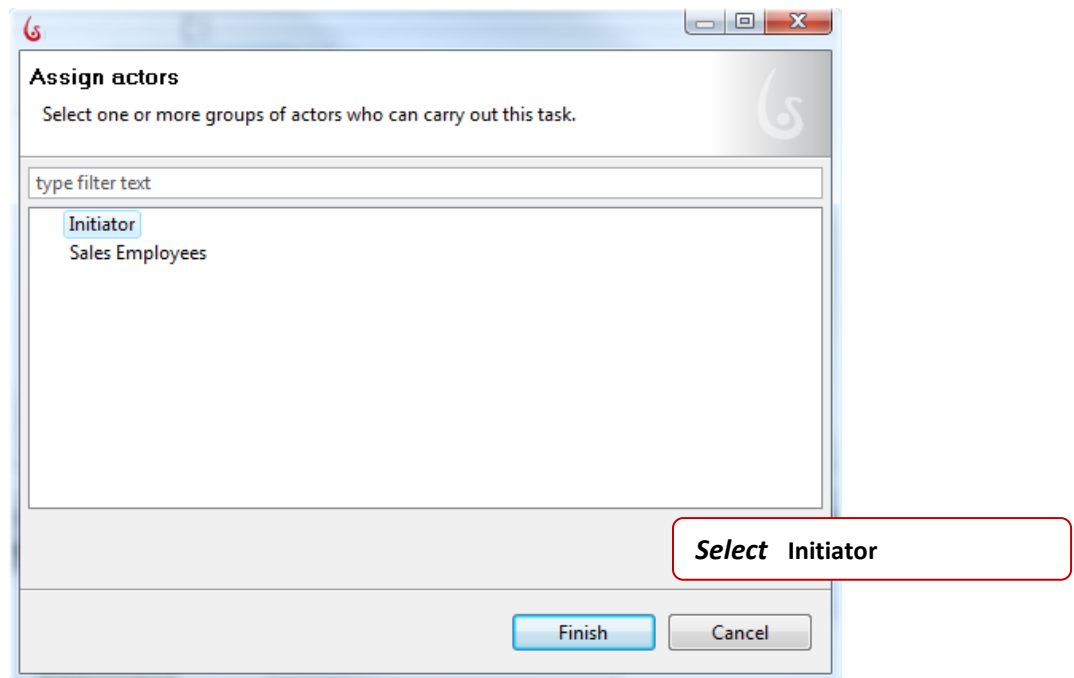


Figure 15. Select the Process Initiator as the Actor for this Step

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

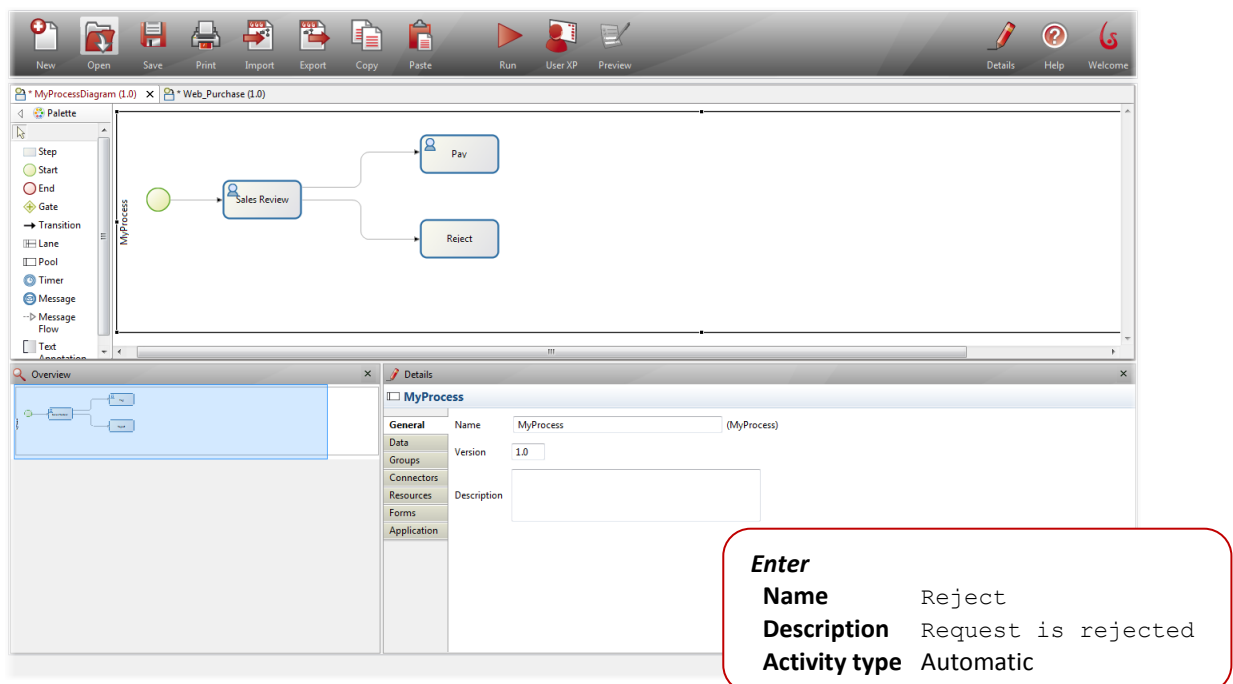


Figure 16. Add **Reject** Step and define its General Details

Then, **More Info**. In **Details** -> **General**:

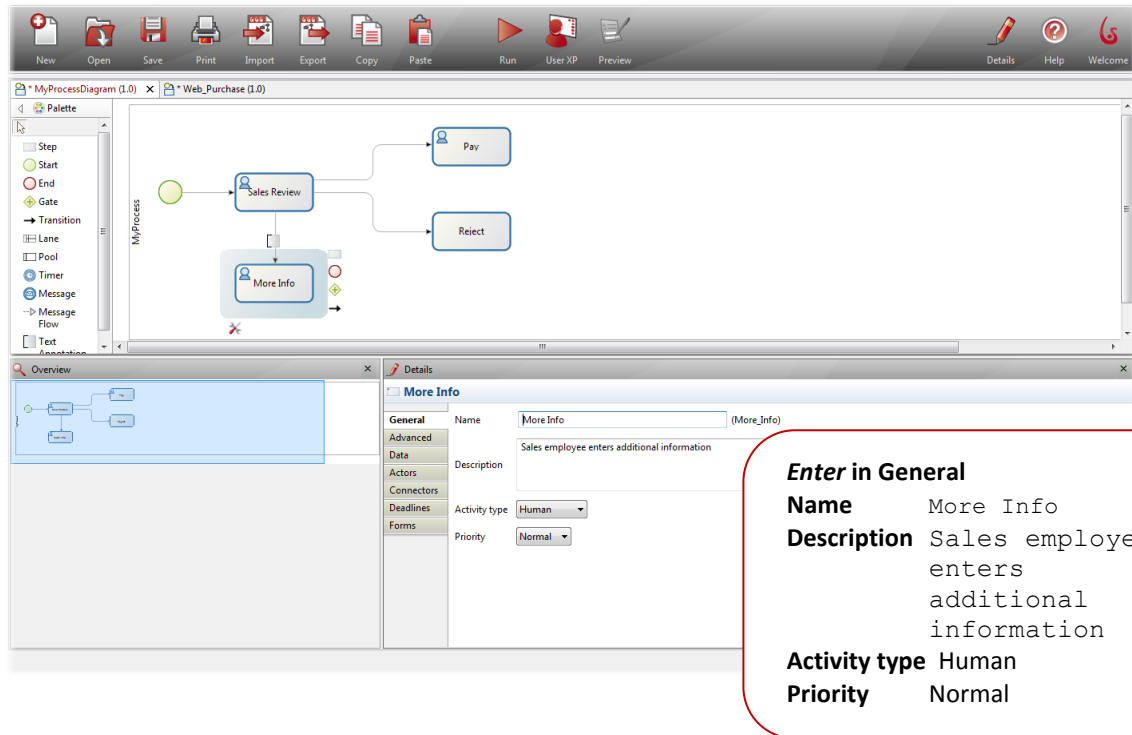


Figure 17. Add **More Info** Step and define its General Details

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

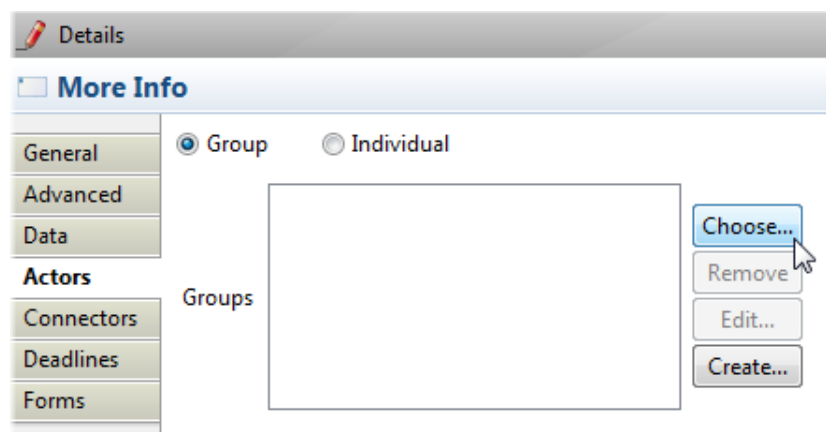


Figure 18. Choose the Group of Actors for **More Info**

Complete the **Assign Actors** wizard:

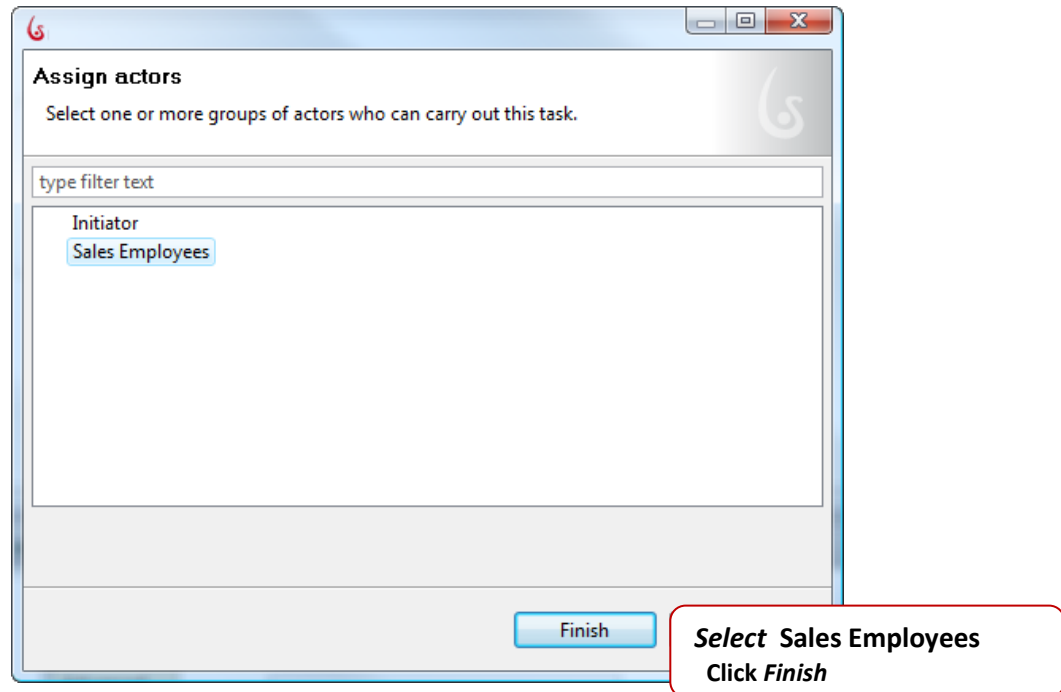


Figure 19. Select the already defined Group **Sales Employees**

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 Pool to deselect all elements. Click on **MyProcess -> Details -> Pool**:

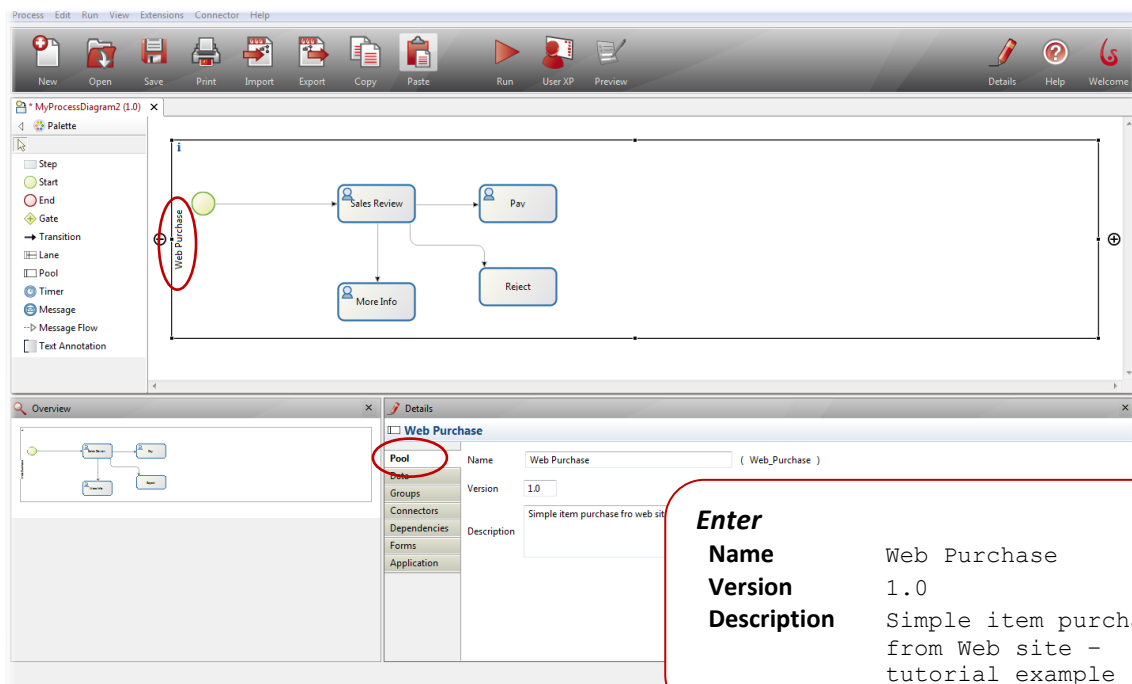


Figure 20. Rename this Pool

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

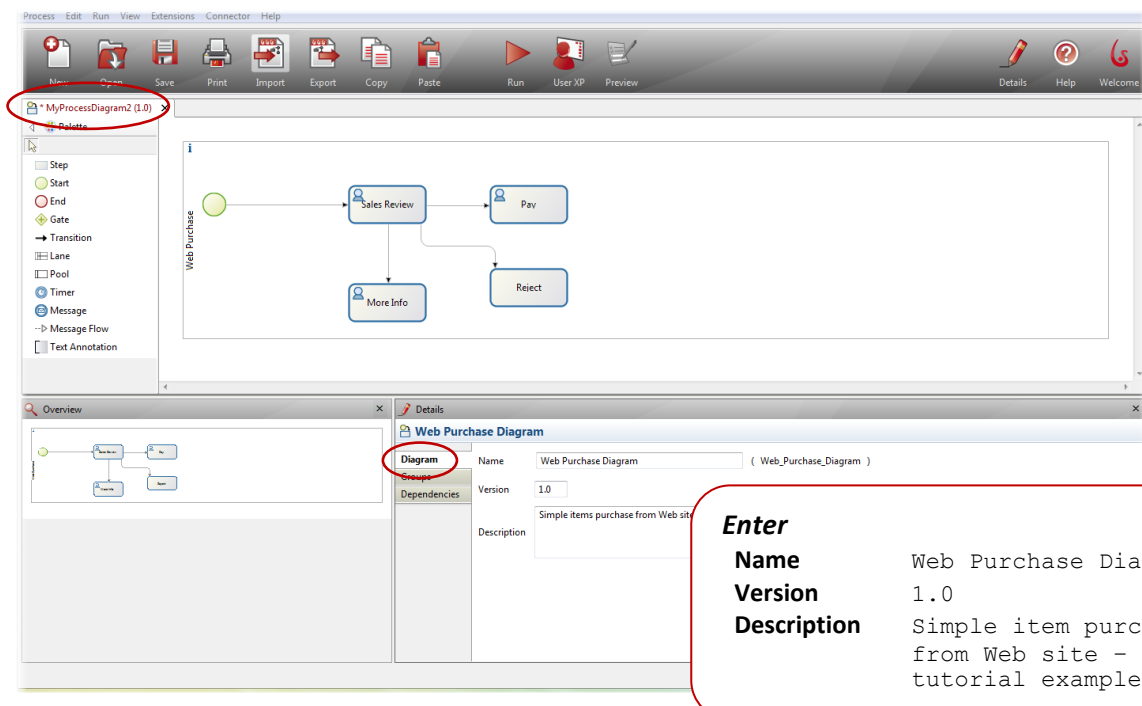


Figure 21. Rename this Process Diagram



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Save the Process. The Whiteboard tab is now labeled **Web Purchase Diagram (1.0)** and the Pool is now labeled **Web\_Purchase**. 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**.

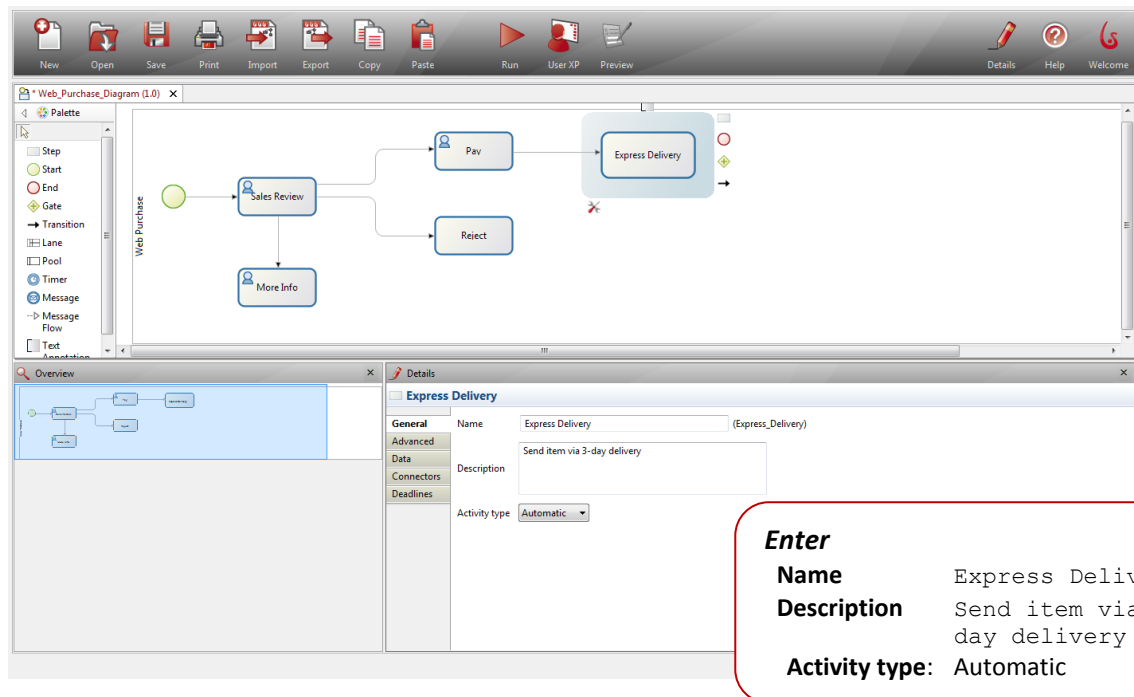


Figure 22. Add **Express Delivery** Step and define its General Details

End this Process by archiving the interaction. Add a Step after Express Delivery, go to **Details -> General**, and name it **Archive**.

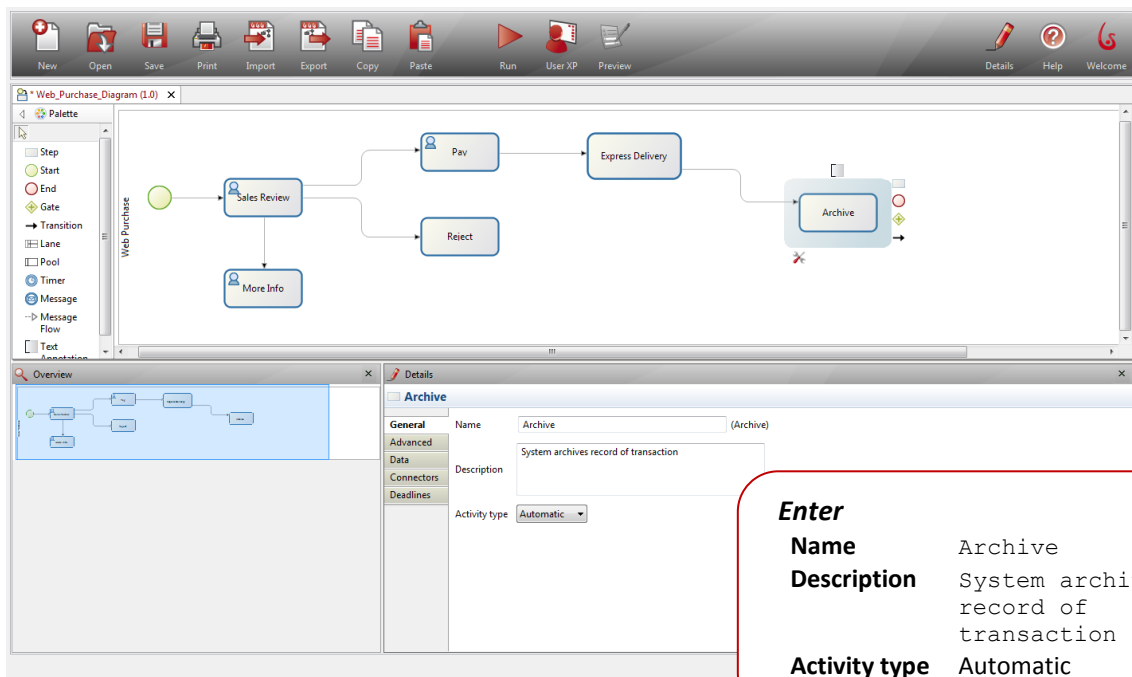


Figure 23. Add **Archive** Step and define its General Details

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 clicking or unclicking the Automatic layout box in its Details.

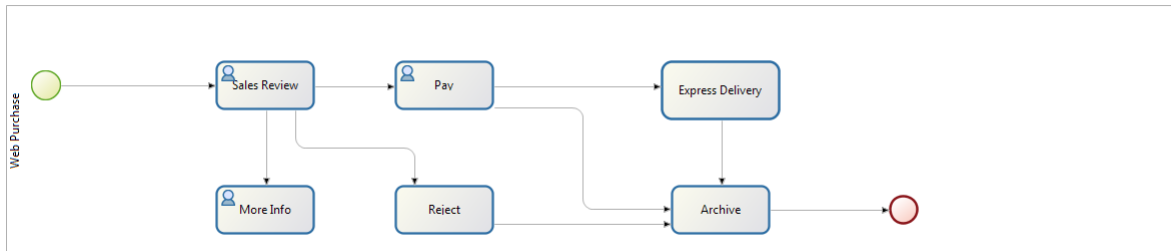


Figure 24. Add an End and rearrange the Process elements on the Whiteboard

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.

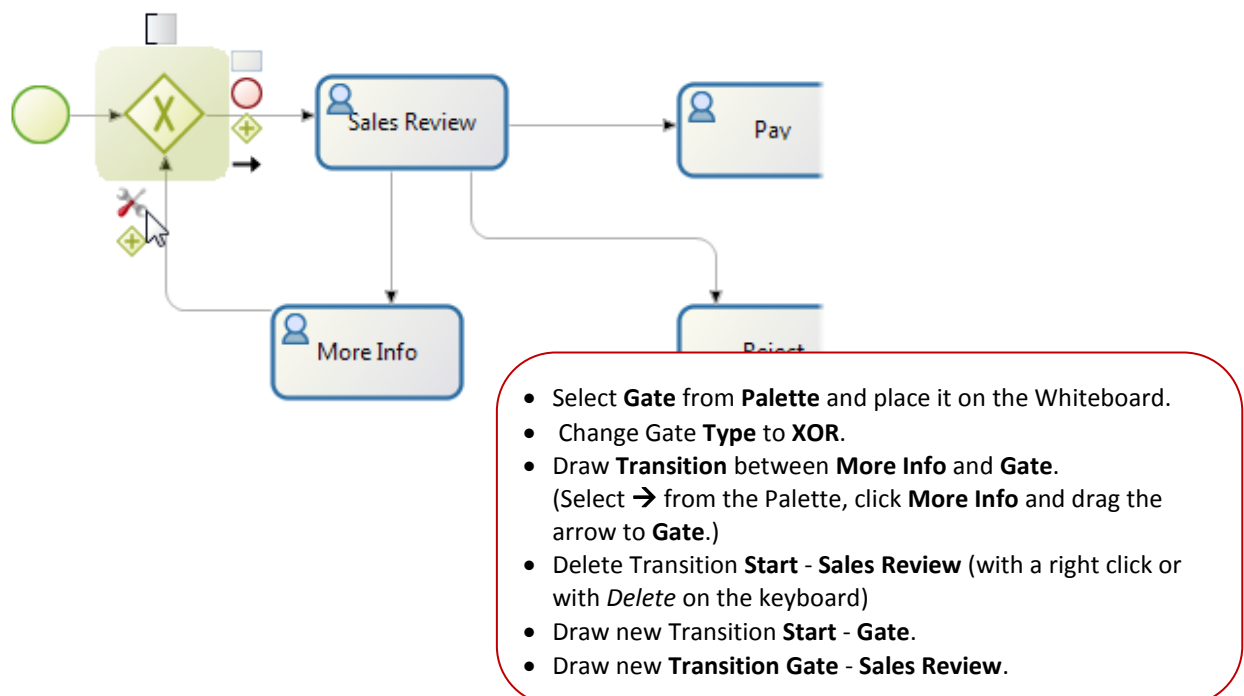


Figure 25. Add an XOR Gate

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**:

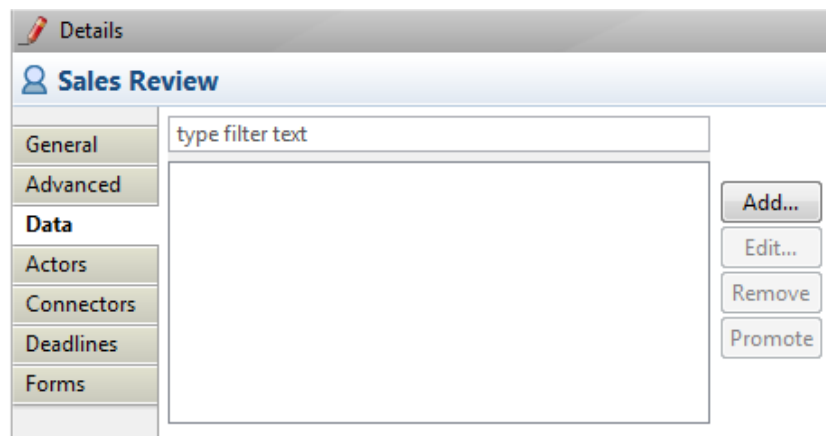


Figure 26. Add Data to Details for **Sales Review**

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 )

Description

Data type

Name \*   
Description

List \*

Approve	<input type="button" value="Add..."/> <input type="button" value="Up"/> <input type="button" value="Down"/> <input type="button" value="Remove"/>
Reject	

**Add an item**

Item name

## 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**

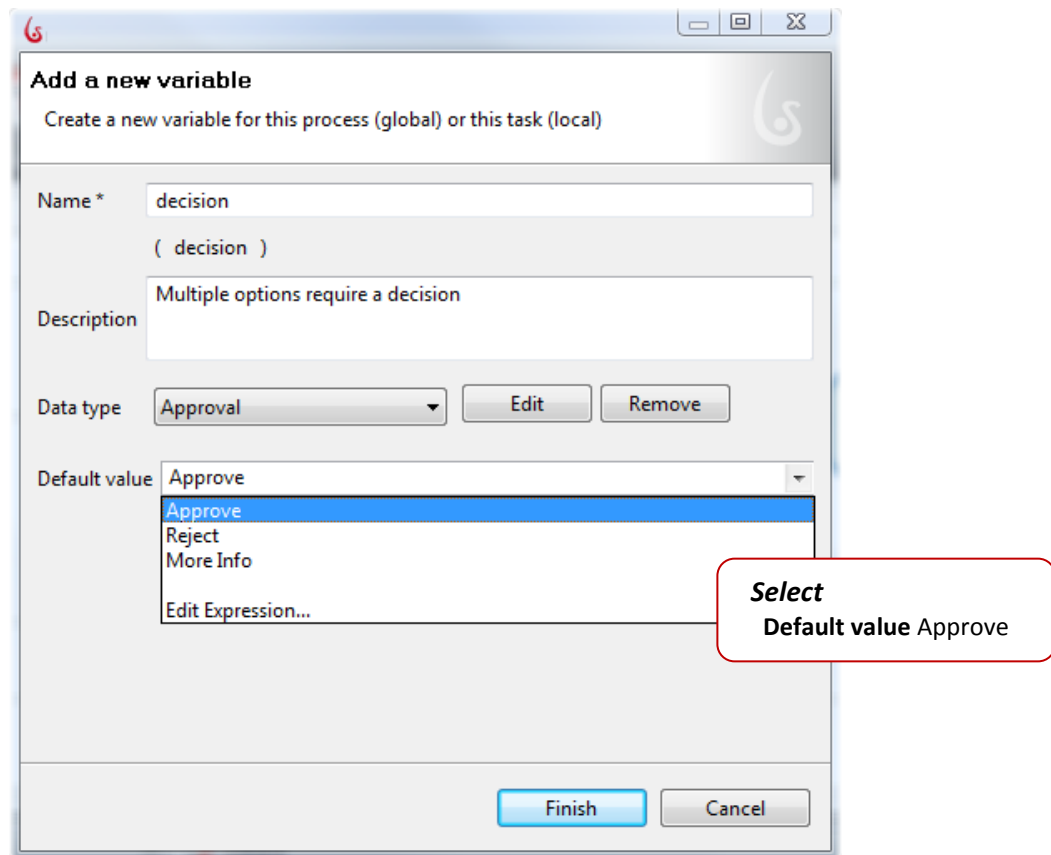


Figure 28. Select a default value for the List

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

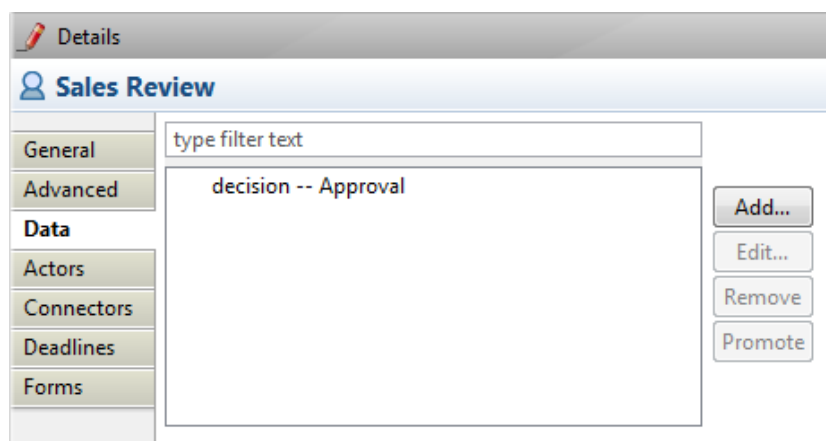
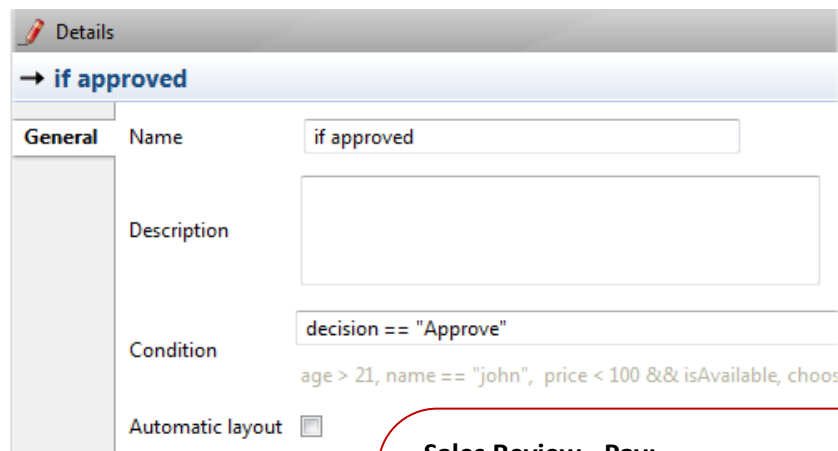


Figure 29. Newly created Data (variable) shows up in Data for this Step

Associate each Transition output from **Sales Review** with its associated decision **Condition**. Select each Transition in turn:



**Details**

→ **if approved**

**General**

Name: if approved

Description:

Condition: decision == "Approve"

Automatic layout: ☐

### 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.



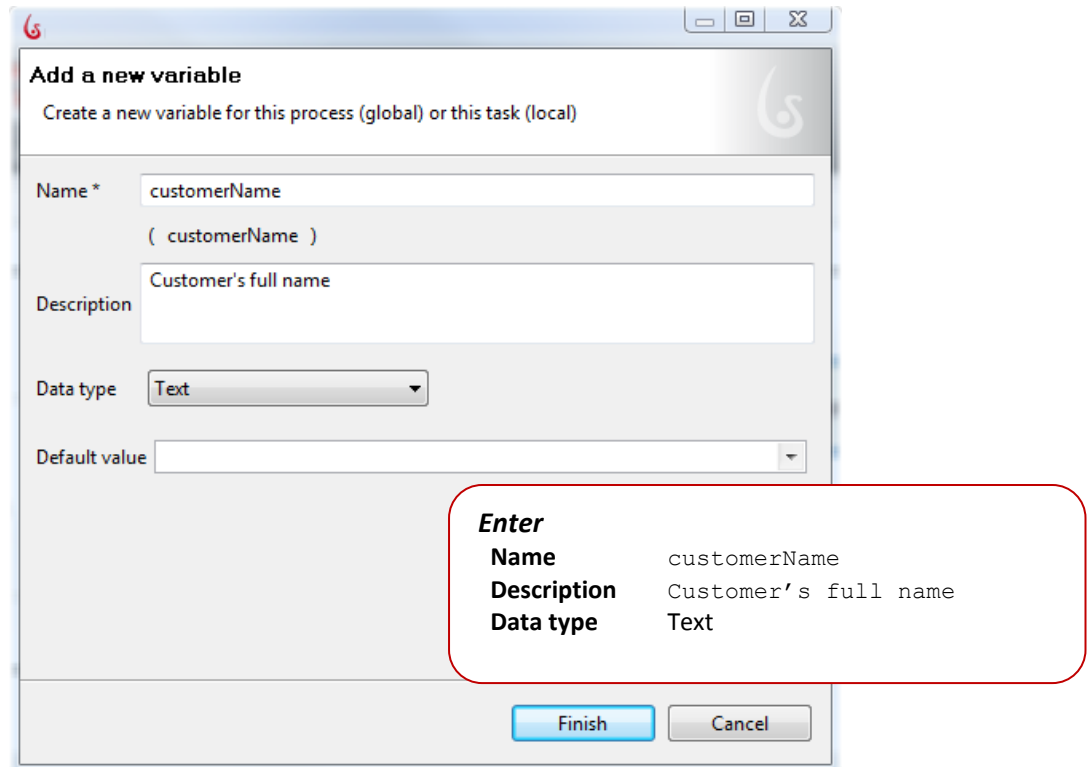
Figure 31. Transition Names appear on Whiteboard

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 Pool, go to **Web Purchase Details**, select **Data**, then **Add**.



**Add a new variable**  
Create a new variable for this process (global) or this task (local)

Name \*   
( customerName )

Description

Data type

Default value

**Enter**

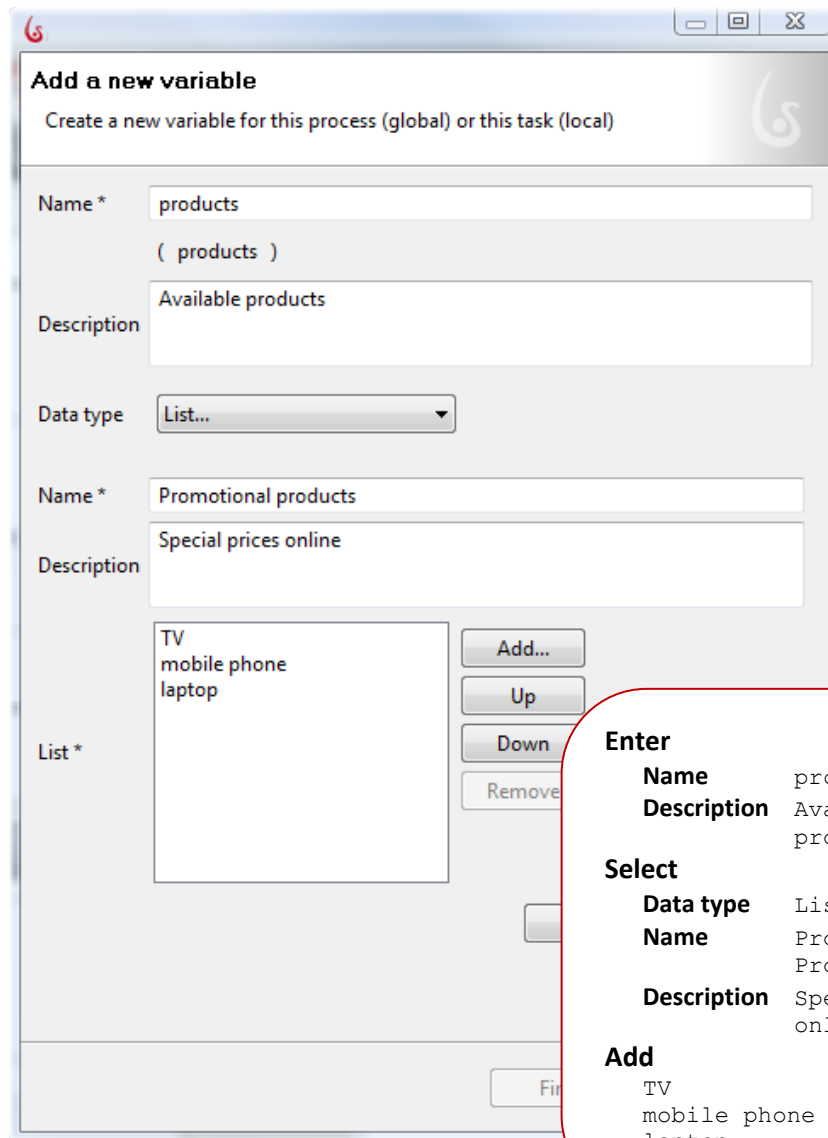
<b>Name</b>	customerName
<b>Description</b>	Customer's full name
<b>Data type</b>	Text

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

Continue, and Add `customerPhone` and `customerEmail` as simple Text variables with no default values.



For the last variable, add a List.



**Add a new variable**  
Create a new variable for this process (global) or this task (local)

Name \* products  
( products )

Description Available products

Data type List...

Name \* Promotional products

Description Special prices online

TV  
mobile phone  
laptop

Add...  
Up  
Down  
Remove

List \*

**Enter**

<b>Name</b>	products
<b>Description</b>	Available products

**Select**

<b>Data type</b>	List
<b>Name</b>	Promotional Products
<b>Description</b>	Special prices online

**Add**

TV  
mobile phone  
laptop

Figure 33. Define a list at Process level (global list variable)

Select a default:

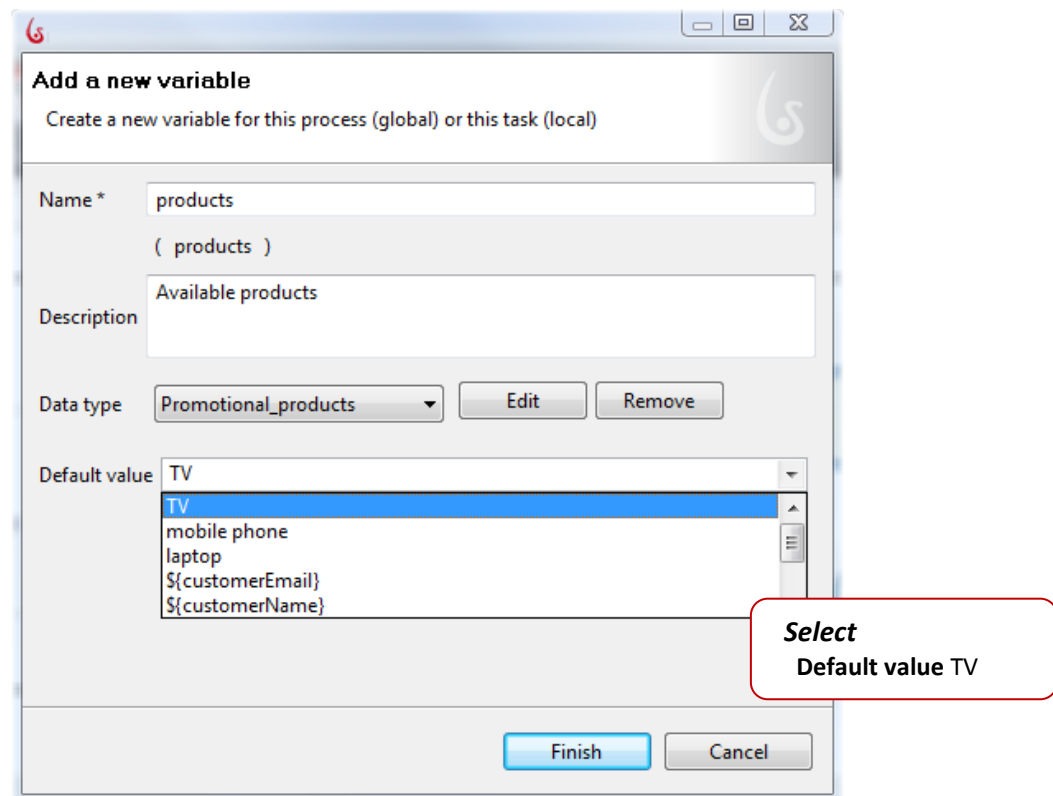


Figure 34. Select a default value for the list

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

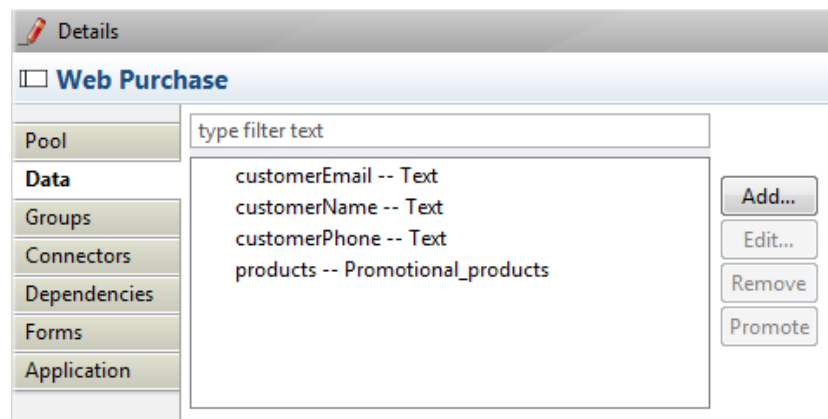
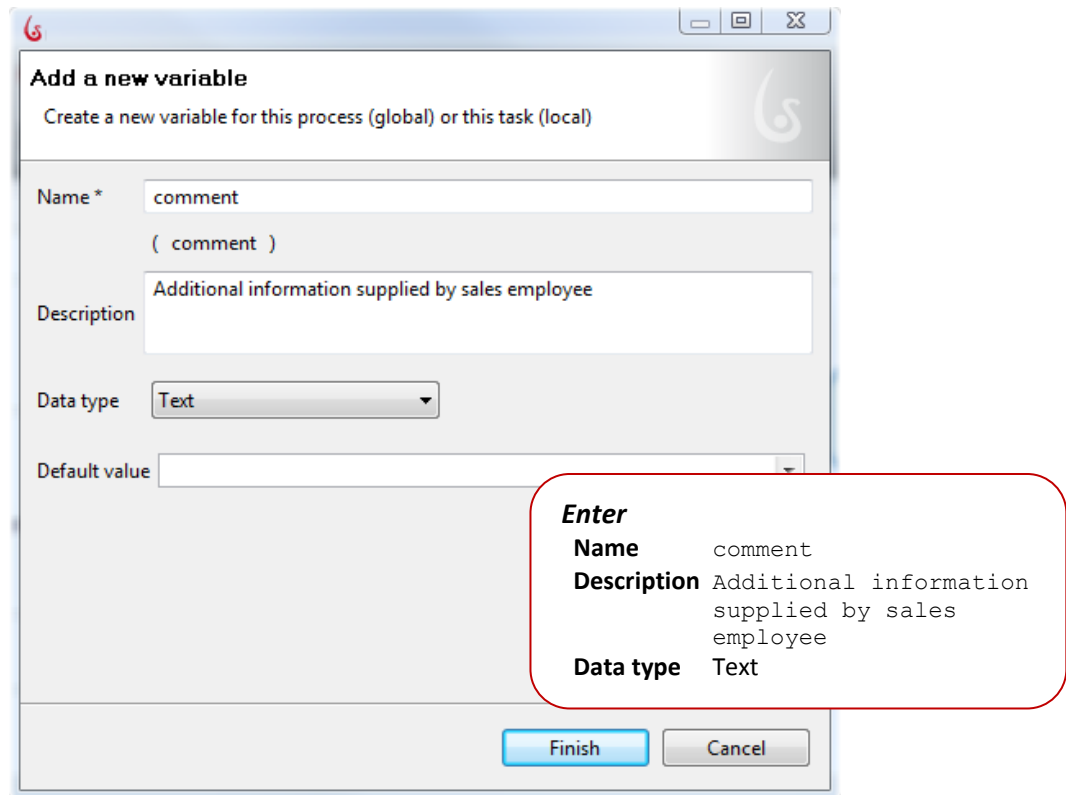


Figure 35. Newly created Data (variables) show up in Data for the Process

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Now complete the details for the **More Info** and **Pay** Steps:

Go to **More Info** -> **Data** and select **Add**:



**Add a new variable**  
Create a new variable for this process (global) or this task (local)

Name \*   
( comment )

Description

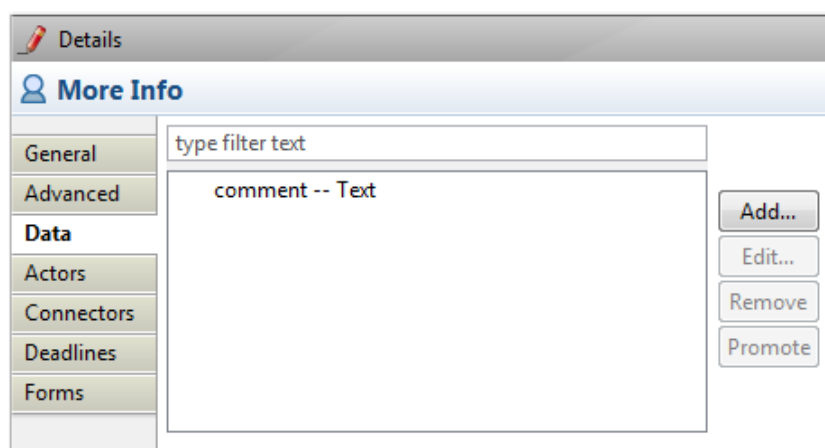
Data type

Default value

**Enter**  
**Name** comment  
**Description** Additional information supplied by sales employee  
**Data type** Text

Figure 36. Add Data to Details for **More Info**

The new variable now shows in Details.



**Details**

**More Info**

General

Advanced

**Data**

comment -- Text

Actors

Connectors

Deadlines

Forms

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

Go to **Pay** -> **Data** and select **Add**.

Add 2 text variables and 1 Boolean variable:

Add 2 text variables:

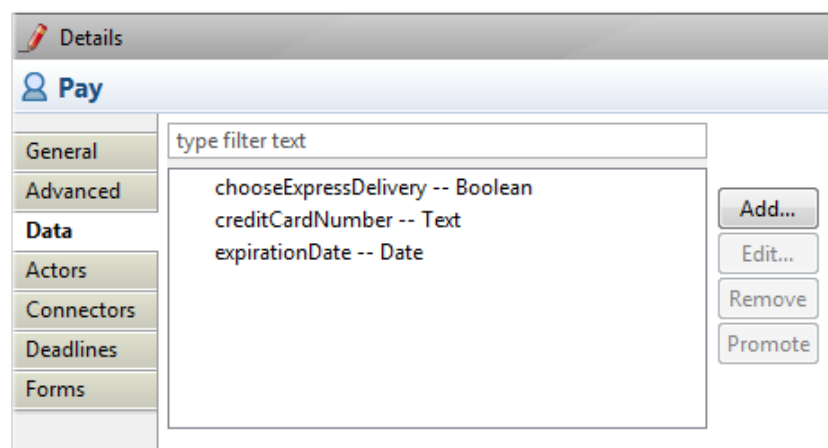
- **Name:** creditCardNumber
- **Description:** Customer's Credit Card
- **Data type:** Text

and

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

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

- **Name:** chooseExpressDelivery
- **Description:** If yes - send express; if no - send regular post
- **Data type:** Boolean
- **Default value:** true

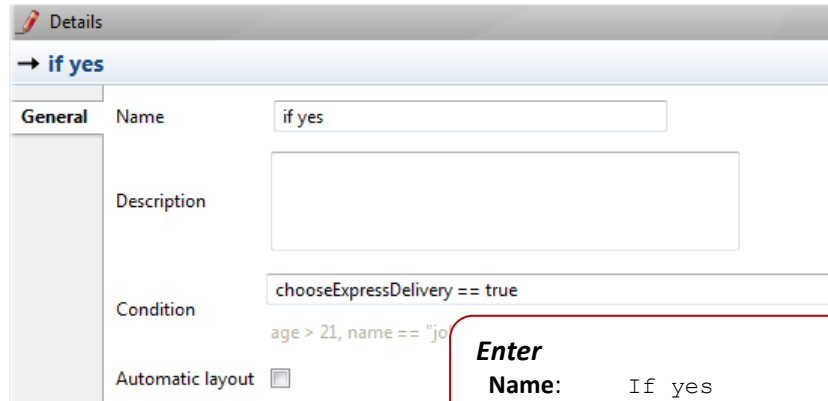


**Figure 38.** Newly created Data (variables) show up in Data for this Step

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**.



The screenshot shows the 'Details' window for a transition. The 'General' tab is selected. The 'Name' field contains 'if yes'. The 'Description' field is empty. The 'Condition' field contains 'chooseExpressDelivery == true'. The 'Automatic layout' checkbox is unchecked. A red-bordered box on the right contains the text: 'Enter Name: If yes Conditions: chooseExpressDelivery == true'.

Figure 39. Add a Condition to a Transition

Select the **Transition** between **Pay** and **Archive**. Change its name to “if no.” In the **Conditions** field, enter `chooseExpressDelivery == false`.

The Name of each Transition now shows on the Process.

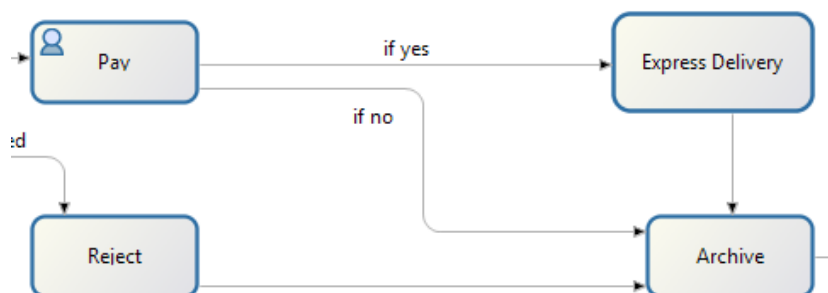


Figure 40. Transition Names appear on Whiteboard

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.

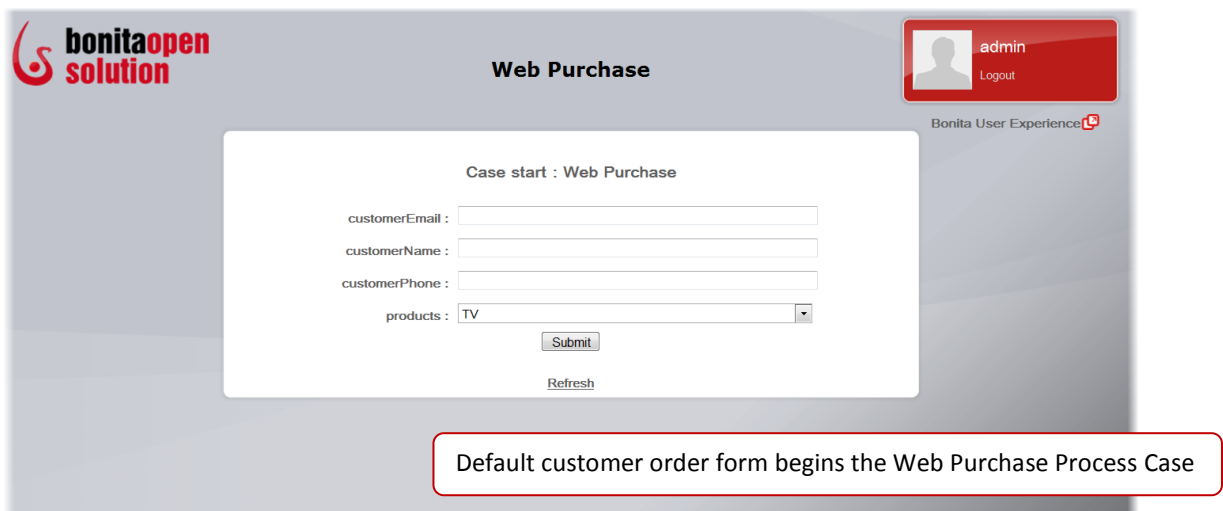


Figure 41. **Web Purchase** Process Case initial form (customer order form)

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**.)

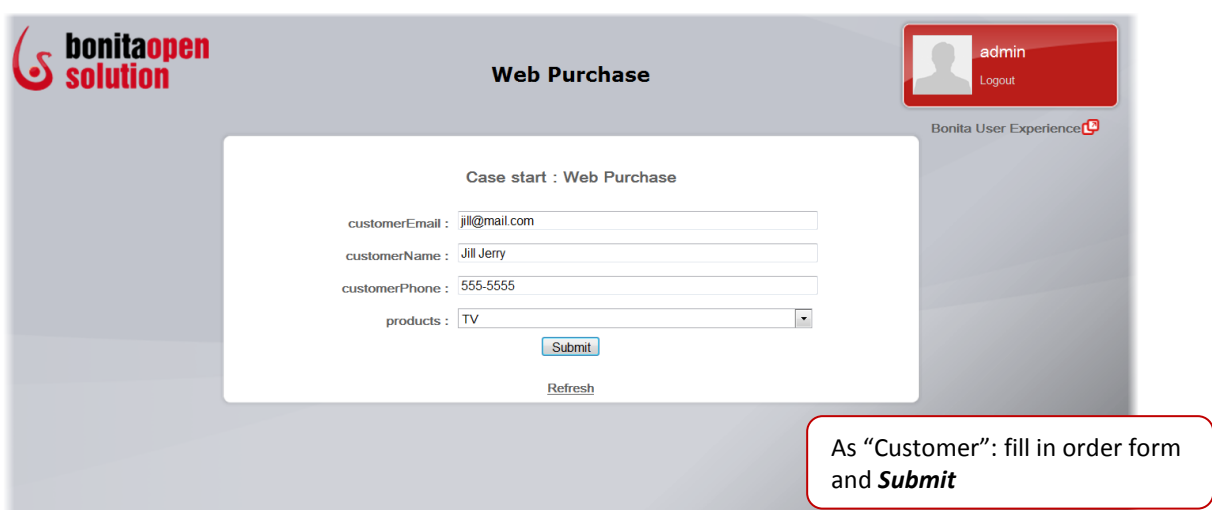
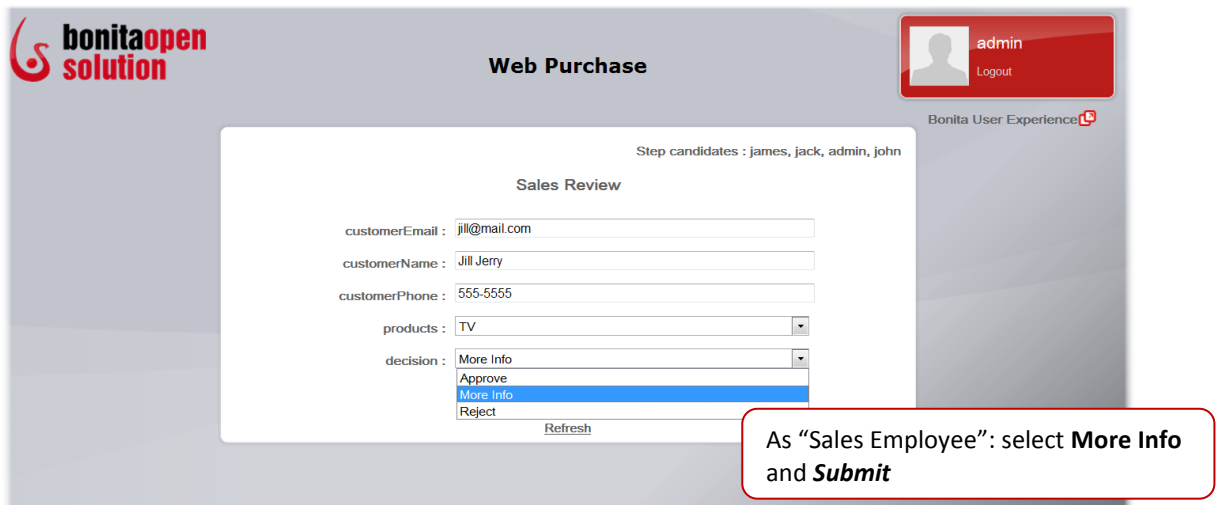


Figure 42. Fill in **Web Purchase** Process customer order form to start a Case

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.



**bonitaopen solution**

**Web Purchase**

Step candidates : james, jack, admin, john

**Sales Review**

customerEmail :

customerName :

customerPhone :

products :

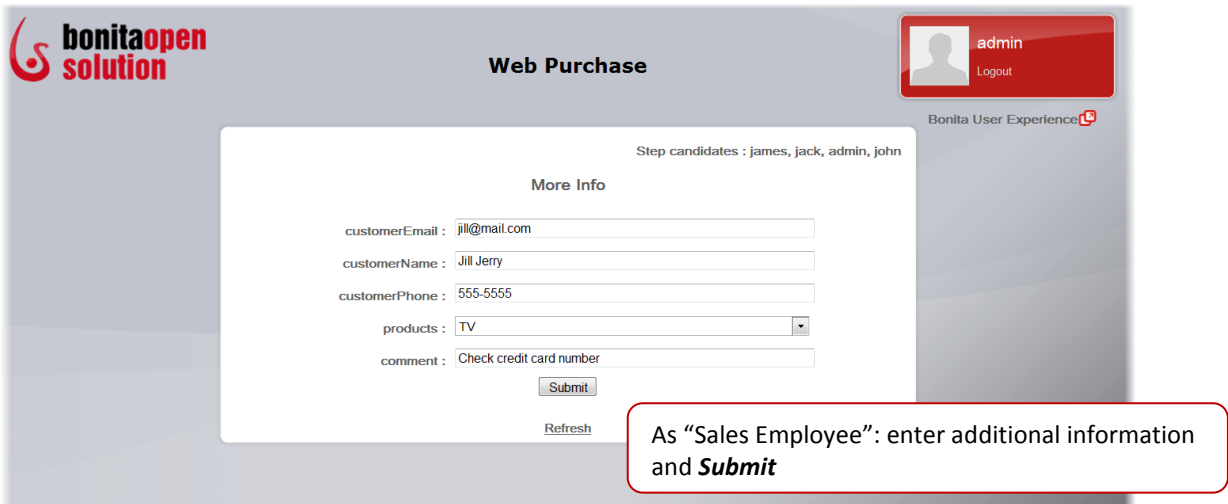
decision :

As “Sales Employee”: select **More Info** and **Submit**

admin  
Logout

Bonita User Experience

Figure 43. Choose a Decision at **Sales Review** Step



**bonitaopen solution**

**Web Purchase**

Step candidates : james, jack, admin, john

**More Info**

customerEmail :

customerName :

customerPhone :

products :

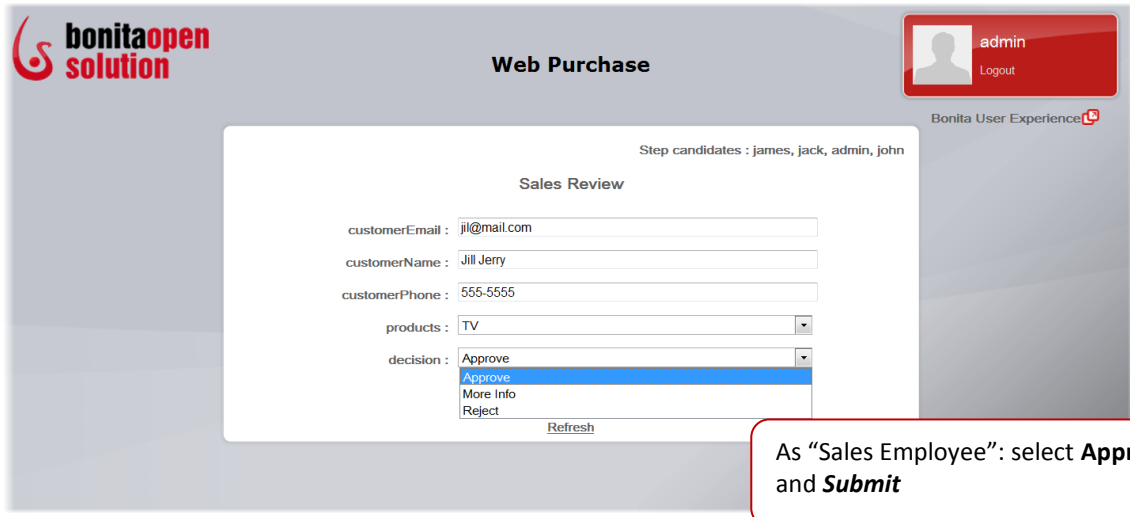
comment :

As “Sales Employee”: enter additional information and **Submit**

admin  
Logout

Bonita User Experience

Figure 44. Fill in form presented at **More Info** Step



**Web Purchase**

Step candidates : james, jack, admin, john

**Sales Review**

customerEmail :

customerName :

customerPhone :

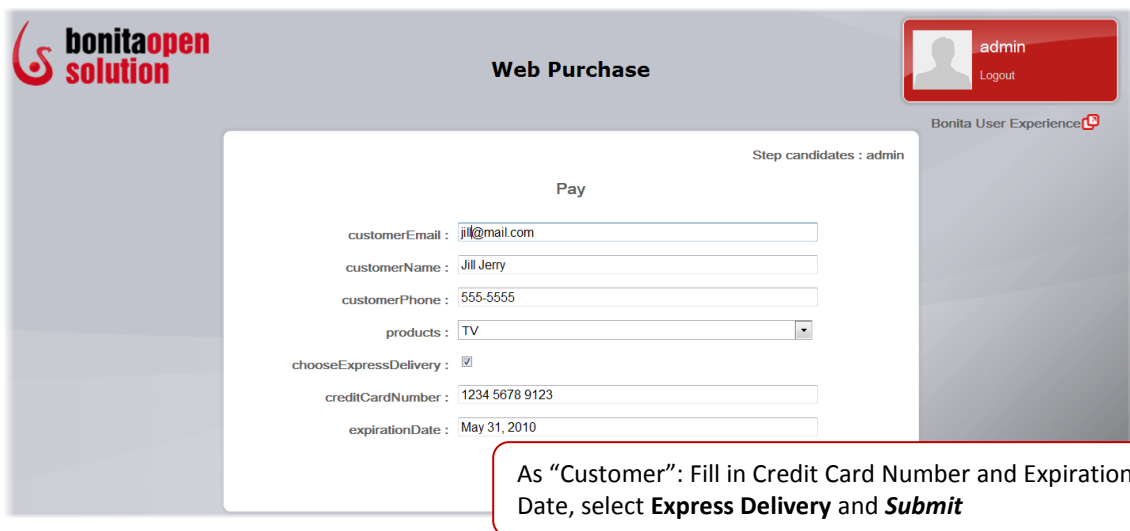
products :

decision :

[Refresh](#)

As "Sales Employee": select **Approve** and **Submit**

Figure 45. Fill in form presented (again, after iteration) at **Sales Review** Step



**Web Purchase**

Step candidates : admin

**Pay**

customerEmail :

customerName :

customerPhone :

products :

chooseExpressDelivery : ☒

creditCardNumber :

expirationDate :

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

Figure 46. 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.



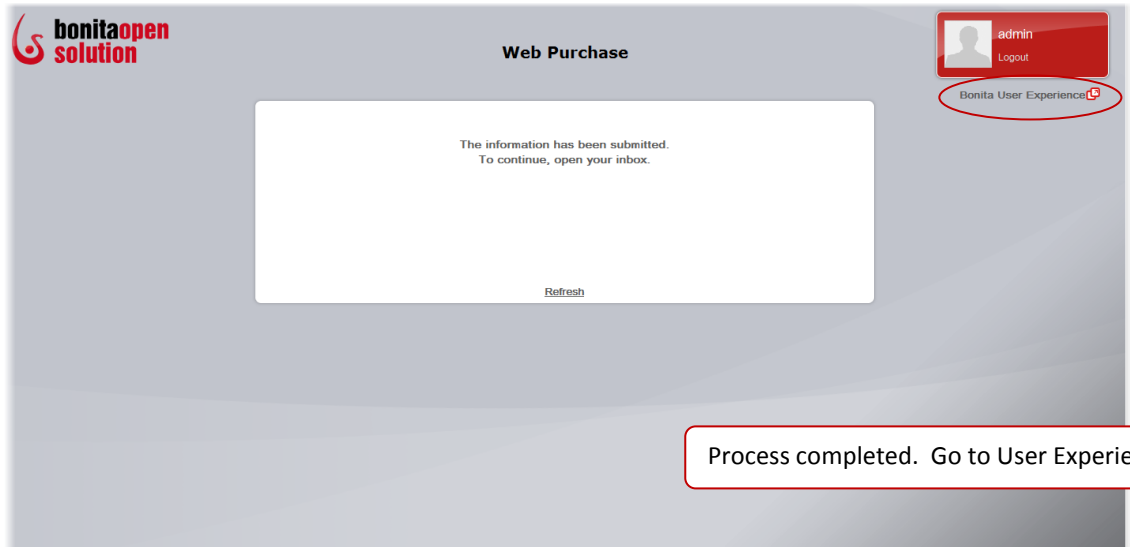



Figure 47. **Web Purchase** Case completed

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.

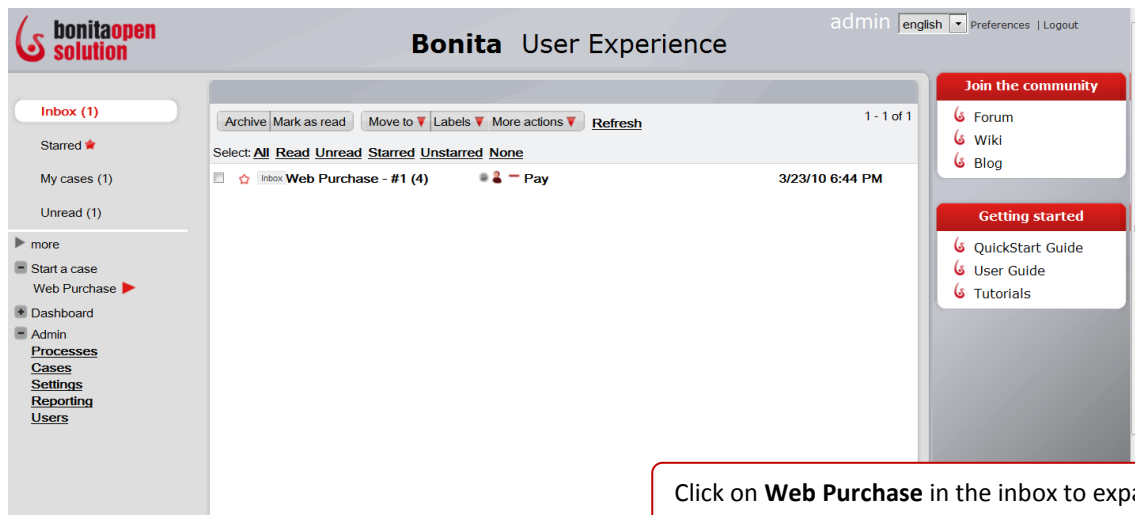
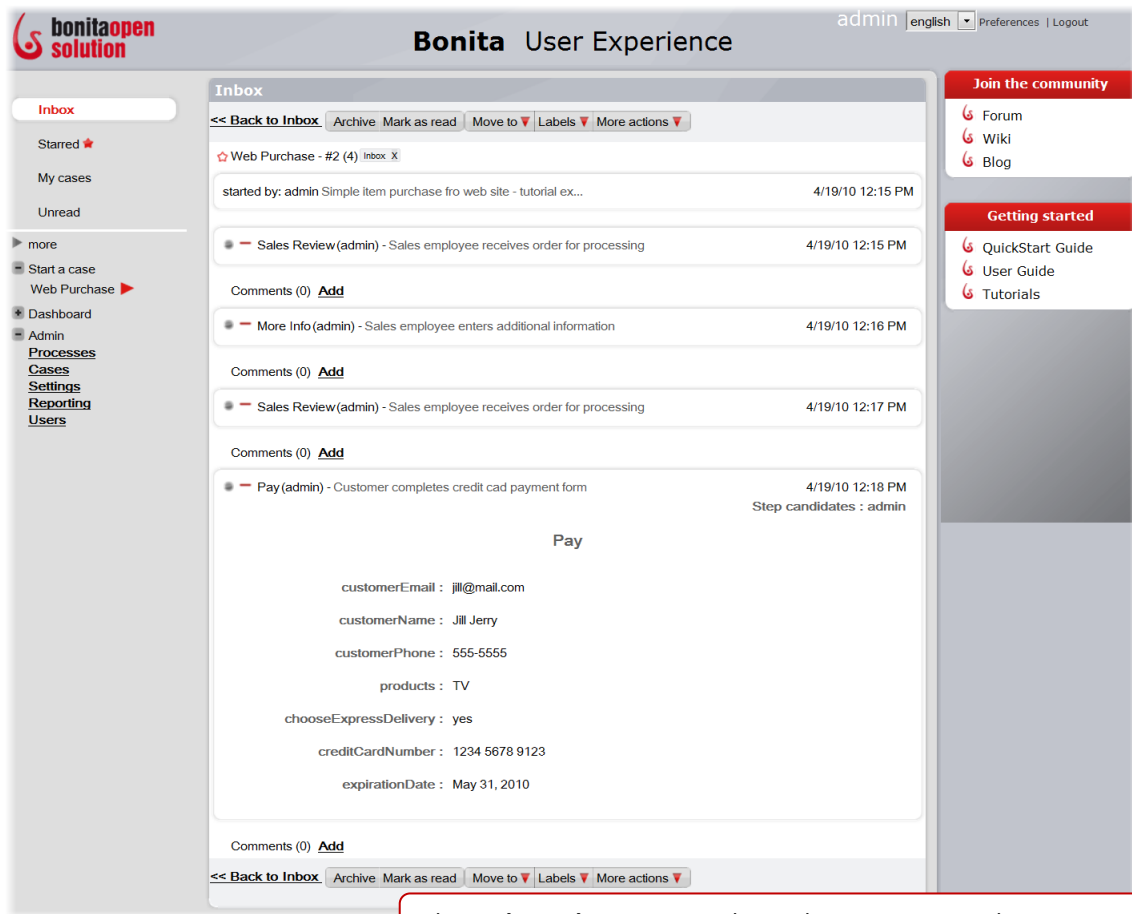


Figure 48. **Bonita User Experience** with completed **Web Purchase** Process test Case

# Bonita Open Solution 5.1 QuickStart Rev 1

Click the case to expand it.

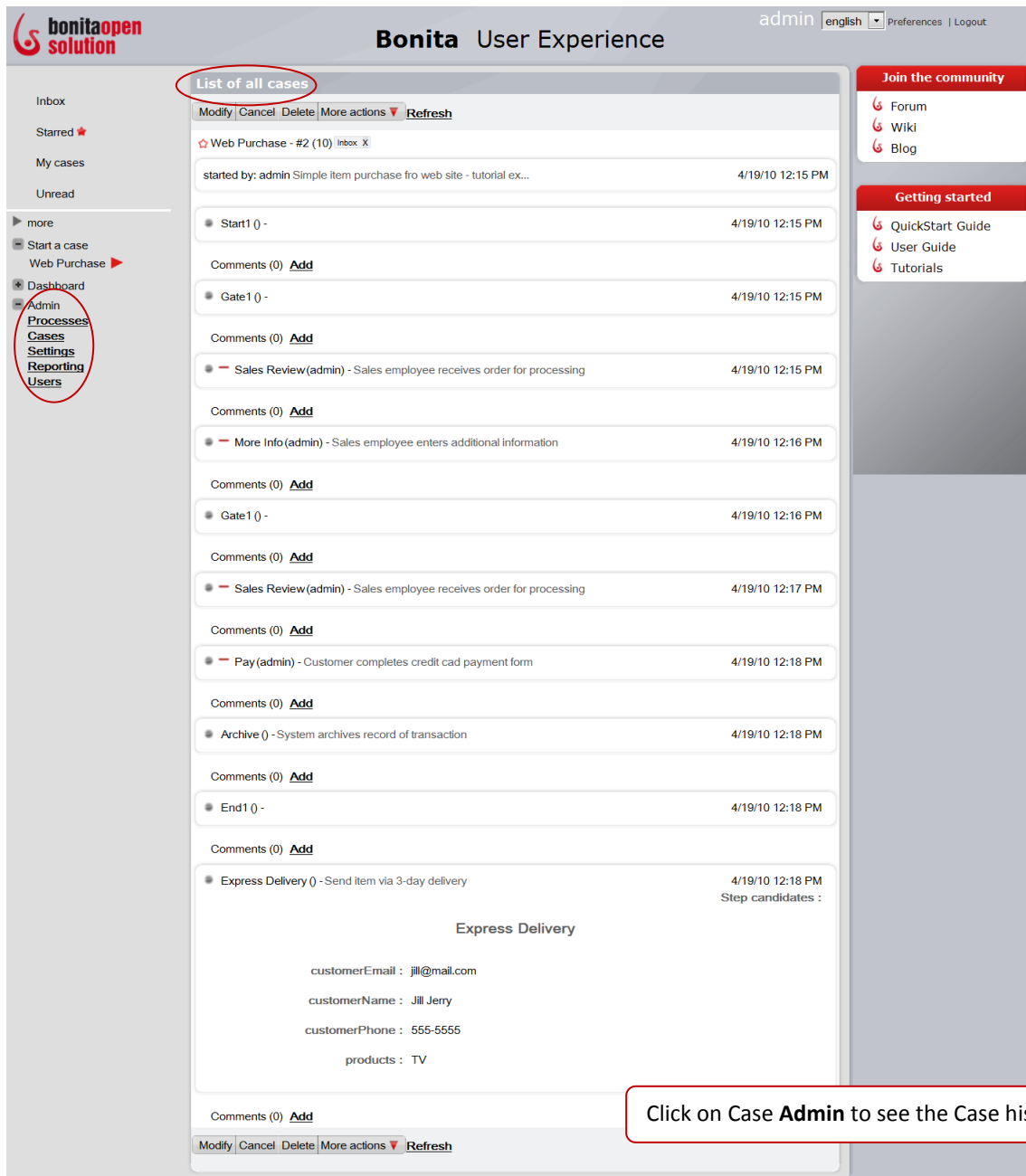


The screenshot displays the Bonita User Experience interface. The top navigation bar includes the Bonita logo, the title 'Bonita User Experience', and user information 'admin | english | Preferences | Logout'. The left sidebar contains a menu with options like 'Inbox', 'Starred', 'My cases', 'Unread', 'more', 'Start a case', 'Web Purchase', 'Dashboard', 'Admin', 'Processes', 'Cases', 'Settings', 'Reporting', and 'Users'. The main content area shows an 'Inbox' with a list of cases. The 'Web Purchase - #2 (4)' case is selected and expanded, showing a timeline of steps: 'started by: admin Simple item purchase fro web site - tutorial ex...', 'Sales Review(admin) - Sales employee receives order for processing', 'More Info(admin) - Sales employee enters additional information', 'Sales Review(admin) - Sales employee receives order for processing', and 'Pay(admin) - Customer completes credit cad payment form'. The 'Pay' step is detailed with fields for customerEmail, customerName, customerPhone, products, chooseExpressDelivery, creditCardNumber, and expirationDate. The right sidebar contains links to 'Join the community' (Forum, Wiki, Blog) and 'Getting started' (QuickStart Guide, User Guide, Tutorials).

The **Web Purchase** Process shows the Steps executed in your test Case

Figure 49. **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.



**List of all cases**

Modify | Cancel | Delete | More actions ▼ Refresh

☆ Web Purchase - #2 (10) [Inbox](#) X

started by: admin Simple item purchase fro web site - tutorial ex... 4/19/10 12:15 PM

Start1 () - 4/19/10 12:15 PM

Comments (0) [Add](#)

Gate1 () - 4/19/10 12:15 PM

Comments (0) [Add](#)

Sales Review(admin) - Sales employee receives order for processing 4/19/10 12:15 PM

Comments (0) [Add](#)

More Info(admin) - Sales employee enters additional information 4/19/10 12:16 PM

Comments (0) [Add](#)

Gate1 () - 4/19/10 12:16 PM

Comments (0) [Add](#)

Sales Review(admin) - Sales employee receives order for processing 4/19/10 12:17 PM

Comments (0) [Add](#)

Pay(admin) - Customer completes credit cad payment form 4/19/10 12:18 PM

Comments (0) [Add](#)

Archive () - System archives record of transaction 4/19/10 12:18 PM

Comments (0) [Add](#)

End1 () - 4/19/10 12:18 PM

Comments (0) [Add](#)

Express Delivery () - Send item via 3-day delivery 4/19/10 12:18 PM

Step candidates :

**Express Delivery**

customerEmail : jill@mail.com

customerName : Jill Jerry

customerPhone : 555-5555

products : TV

Comments (0) [Add](#)

Modify | Cancel | Delete | More actions ▼ Refresh

Click on Case Admin to see the Case history

Figure 50. See the entire Case History with the Admin function

# Bonita Open Solution 5.1 QuickStart Rev 1

To run this Process again:

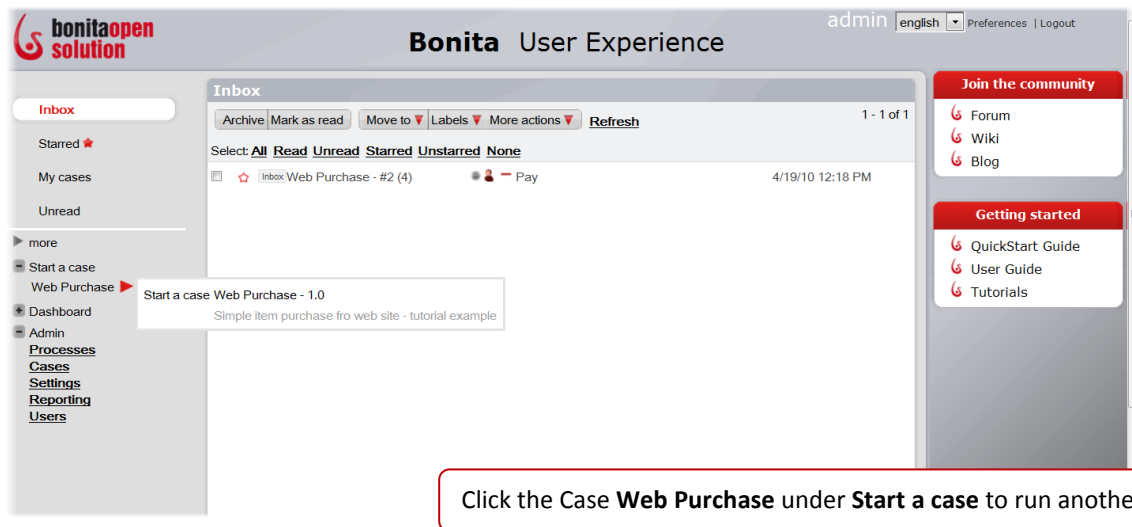


Figure 51. Start another Case for the **Web Purchase** Process

The Process starts again with a new Case.

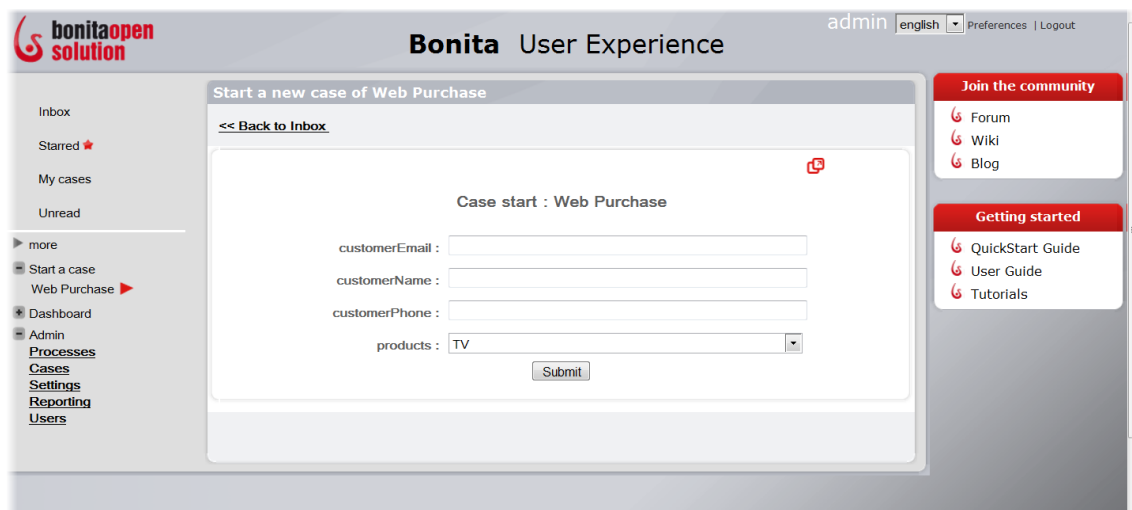


Figure 52. Fill in web purchase process customer order form to start a new case

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;
  - defining text and list variables;
  - defining a Boolean variable;
- defining Conditions on Transitions to manage multiple output choices from a Step; and
- defining a Gate to manage multiple inputs to a Step 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](http://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](http://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](http://www.bonitasoft.com/community/join.php))

For more information, contact us at [BonitaSoft](#).  
([www.bonitasoft.com/company/contact.php](http://www.bonitasoft.com/company/contact.php))

*Have fun with Bonita!*