



**bonita****soft**

*open your processes*

## **Bonita Open Solution**

**Version 5.4**

## **QuickStart Guide**

## Bonita Open Solution Version 5.4 QuickStart Guide

### Contents

Change Notice .....	4
Part 1. Overview.....	4
1.1 Download, install, and launch Bonita Open Solution 5.4 .....	4
1.2 General Description .....	5
Part 2. Bonita Studio .....	6
2.1 Whiteboard .....	6
2.2 Palettes .....	7
2.2.1 Context palette .....	8
2.3 Overview .....	9
2.4 Detail Panel .....	9
2.4.1 General.....	9
2.4.2 Application .....	10
2.4.3 Appearance .....	10
2.4.4 Simulation .....	10
2.5 Menu bar.....	11
2.6 Task bar .....	11
Part 3. Bonita Studio Form Builder .....	11
3.1 Form Builder Grid.....	12
3.2 Form Builder Palette .....	12
3.3 Form Builder Details Panel.....	13
3.4 Form Preview .....	13
3.5 Forms presented in Web application.....	13
Part 4. Bonita User Experience .....	13
4.1 Processes.....	14
4.2 Organization.....	15
4.3 Reporting.....	15
4.4 User Labels .....	15
Part 5. Feedback, Questions, and More Information .....	15

## Figures

Figure 1. Welcome to Bonita Studio in Bonita Open Solution .....	5
Figure 2. Bonita Studio ready for a new Process design .....	6
Figure 3. Pools and lanes on the Whiteboard (within a single Process Diagram) .....	7
Figure 4. Detailed Palette, Advanced Palette and Simple Palette .....	8
Figure 5. Two examples of the Context Palette: Step and Gate .....	8
Figure 6. Detail Panel example: General tab at the Diagram level .....	9
Figure 7. Detail Panel Example: Application tab at the Pool level .....	10
Figure 8. Bonita Open Solution Menu bar .....	11
Figure 9. Bonita Open Solution Task bar .....	11
Figure 10. Add a Form .....	12
Figure 11. Bonita Studio Form Builder .....	12
Figure 12. Bonita User Experience – User View .....	14
Figure 13. Bonita User Experience – Administration View .....	14

## Change Notice

The tutorial included in the QuickStart Guides for previous releases of Bonita Open Solution has been removed from this QuickStart Guide for Bonita Open Solution 5.4.

The **Bonita Open Solution 5.4 Introductory Tutorial** is now available in a standalone document. The **Tutorial** will take you through creating, running, and managing a Process step by step.

Bonita Open Solution 5.4 contains new functions and presents a new user interface in both Bonita Studio and Bonita User Experience. This QuickStart Guide shows the updated interfaces. For more information about the new functions and for detailed information about Bonita Open Solution functionality, see the **Bonita Open Solution User and Reference Guide**.

## Welcome to Bonita Open Solution!

Download Bonita Open Solution 5.4: [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 its graphic tools for process design.

## Part 1. Overview

### 1.1 Download, install, and launch Bonita Open Solution 5.4

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

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

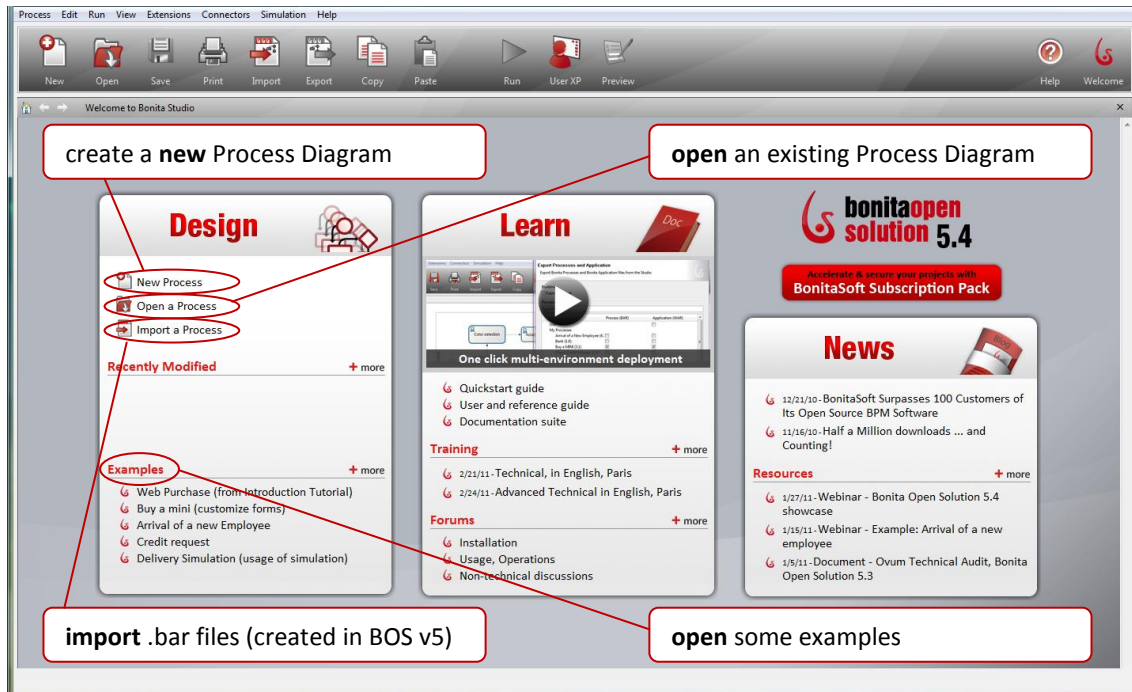


Figure 1. Welcome to Bonita Studio in Bonita Open Solution

## 1.2 General Description

**Bonita Studio** is the graphic process design interface of Bonita Open Solution. This is what you see when you launch Bonita Open Solution.

**Form Builder in Bonita Studio** is used to create and customize Forms which are deployed via stand-alone Web-based applications (Bonita Open Solution default applications are included).

This is the part of Bonita Open Solution that you use to create Forms that can be presented externally and can be widely distributed, accessible by your end users via a web portal or standalone web page, designed by you and integrated into your company or organization's web site or intranet.

**Bonita User Experience** provides a portal designed for management of deployed process. It can be used:

- by the Process Developer to develop and test the management of tasks (steps) in cases
- by the end users who can take action in tasks (steps)
- by both end users and Process Administrators to manage process cases, according to access permission
- by the Process Administrator to manage deployed processes, user access, and more.

## Part 2. Bonita Studio

When you click **New** to enter Bonita Studio, you'll see a Whiteboard and several bars and panels that provide tools for Process design. More information on each of these panels follows.

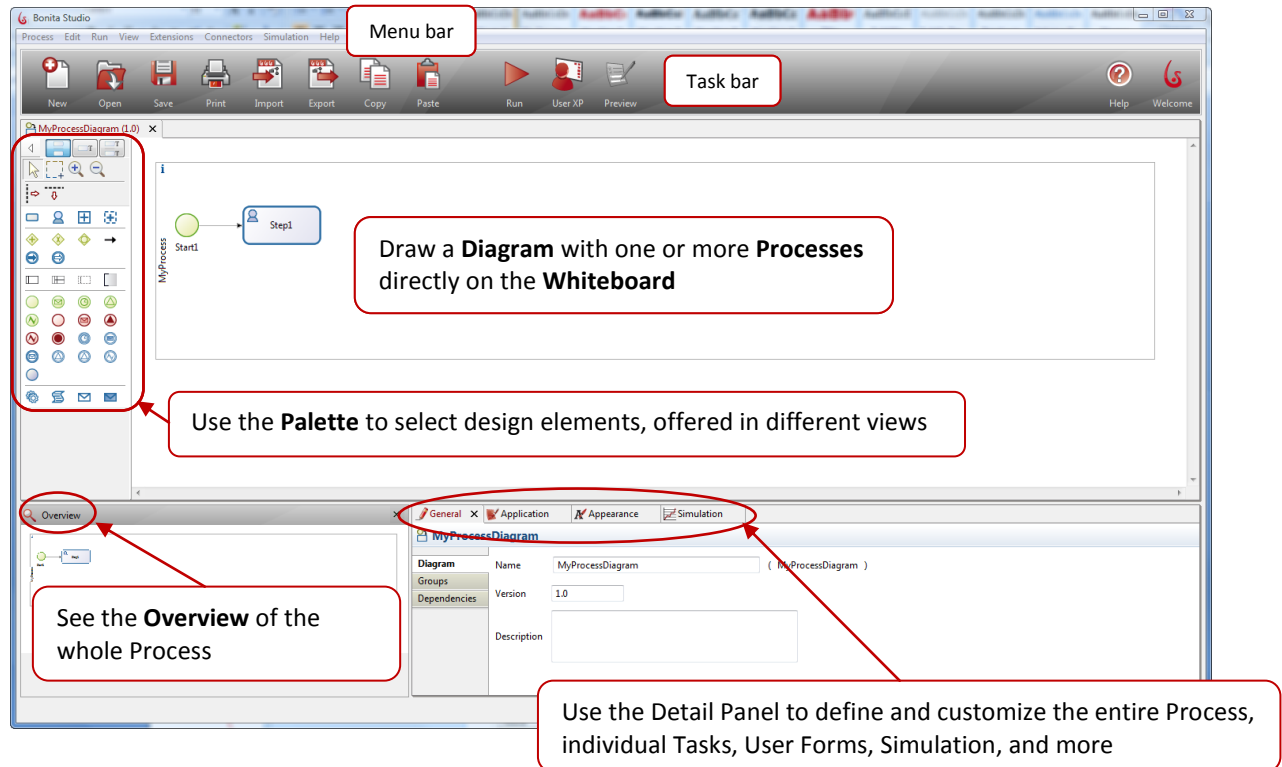
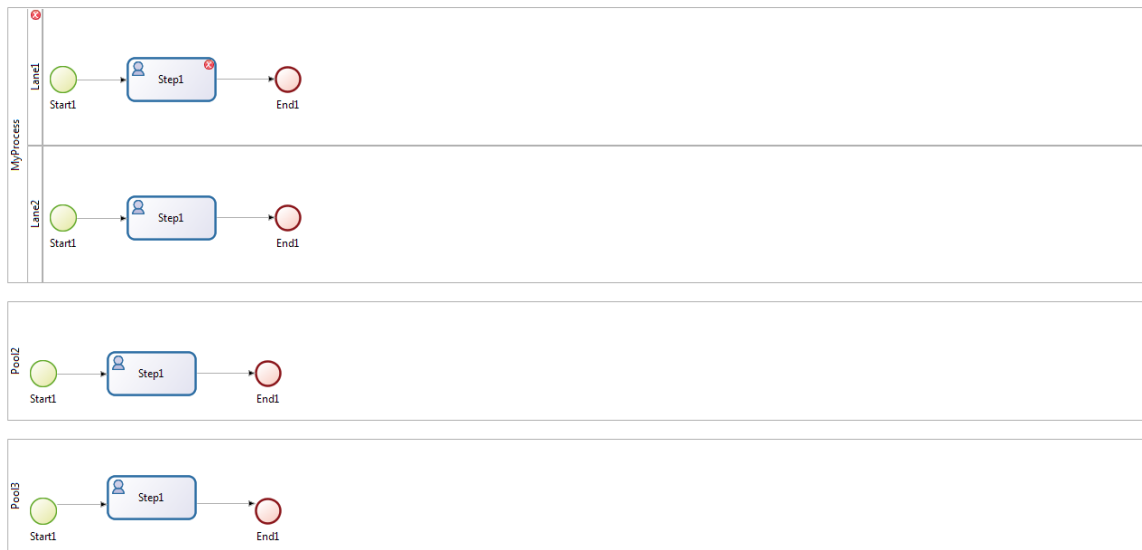


Figure 2. Bonita Studio ready for a new Process design

### 2.1 Whiteboard

The Whiteboard offers a graphic interface to draw processes. It allows you to draw, inside a single Process Diagram, one or more Pools, and multiple Lanes within each Pool.



**Figure 3. Pools and lanes on the Whiteboard (within a single Process Diagram)**

Pools and Lanes are defined in BPMN 2.

A Pool is equivalent to a stand-alone Process and contains all the elements and resources needed to deploy a complete Process. It can contain one or more Lanes which might represent different organizations participating in the process.

Lanes are never standalone; they can exist only within a Pool. They are useful to organize a Process visually, and can be specifically associated with a Group of Actors (ie, end users associated with an organizational group).

When you save a Process Diagram, all Processes and all resources are saved together. When you export a Diagram, each Pool (Process) in the diagram is saved as an individual \*.bar file in the directory or folder you choose.

## 2.2 Palettes

The Design Palettes provides all the graphical elements needed to design a Process. All of the same elements are available in 3 different views.

Click on an element in any of the Palette views, and drag it into place on the Whiteboard.

The elements in the 3 Design Palettes, and in the Context Palette, correspond to the definitions of design elements in BPMN2.

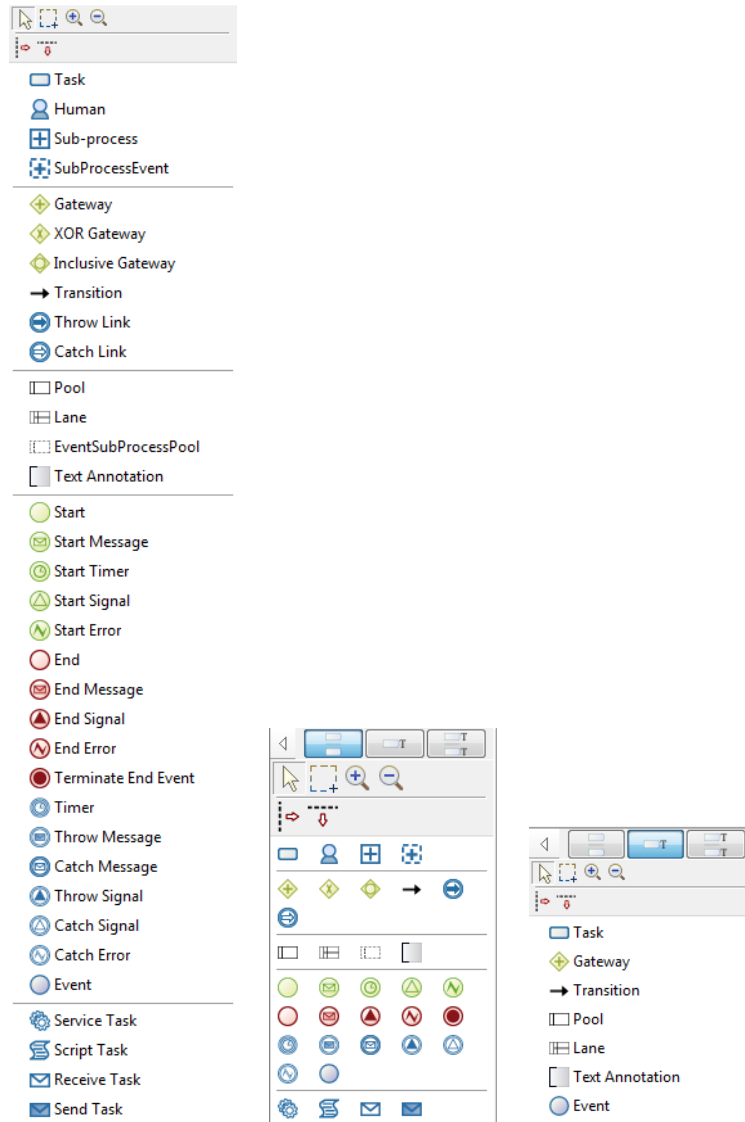


Figure 4. Detailed Palette, Advanced Palette and Simple Palette

## 2.2.1 Context palette

When you click on an element on the Whiteboard, you'll see a highlighted Context Palette. Use this to avoid the need to click back-and-forth from the Design Palettes at the left to the Whiteboard as you design. Design faster!

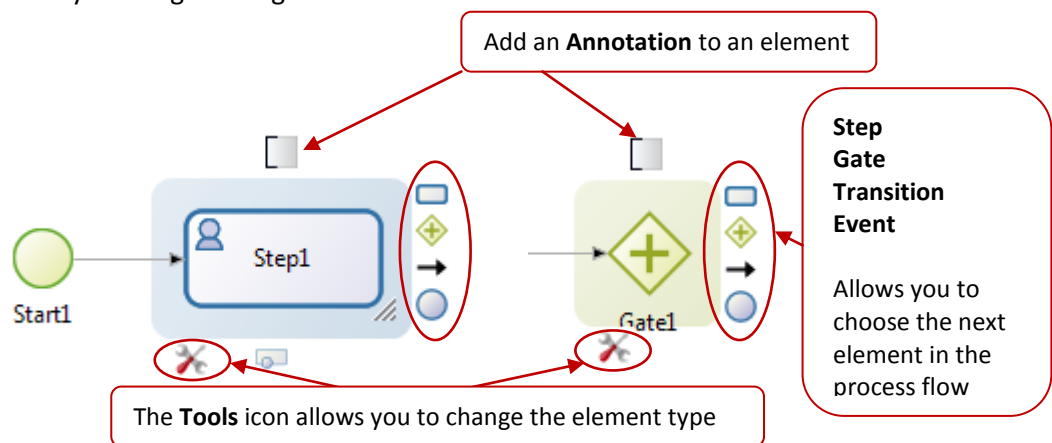


Figure 5. Two examples of the Context Palette: Step and Gate

## 2.3 Overview

The Overview panel stays fixed as you design, but you can see the entire Whiteboard (with all Pools) in a zoomed-out view.

It's useful to know that you can select any part of your Process, and right-click to select a Zoom in (also Ctrl + +) or Zoom out (also Ctrl + -).

## 2.4 Detail Panel

Use the views (tabs) in the Detail Panel to define and customize the entire Process, individual Tasks, User Forms, Simulation, and more. The Details panel organizes many customization functions in its 4 tabs. Click on any element in the Whiteboard to see the Details panels associated with it:

- General
- Application
- Appearance
- Simulation

### 2.4.1 General

At the Diagram level, the **General** tab allows you to:

- change the Diagram name and version
- define Selectors that will dynamically fetch Actors
- manage the various dependencies (Java libraries needed for process to run: connectors, validators, third-party libraries, scripts) for the Processes in this Diagram

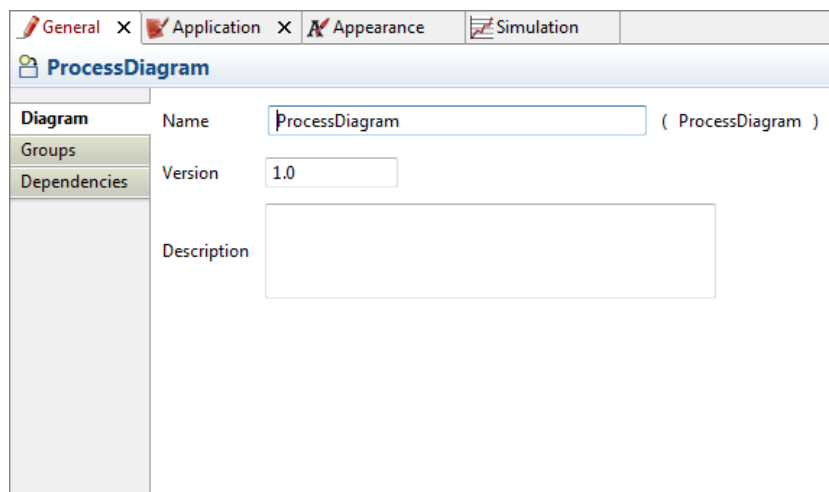


Figure 6. Detail Panel example: General tab at the Diagram level

At the Pool and Step levels, the **General** tabs allow you to

- change the Pool name and version and the Step name
- define User XP characteristics that will be applied in User Experience when the deployed Process is run
- define global and local data variables
- define Selectors that will dynamically fetch Actors
- define Connectors to external systems
- manage the various dependencies for this Pool

## 2.4.2 Application

The **Application** tab allows you to define Forms at the Pool and Step level. You can also define what order the Forms appear in. Entry forms are user-interactive; View and Overview forms are read-only (for example, for summarizing data or presenting information).

At the Pool level, the Application tab also provides functions to change external web resources and the look-and-feel for the user interfaces (forms, welcome page, log-in, page, confirmation messages, and more).

The **Transient Data** tab located here also allows you to define variables that are temporarily useful within any form.

The Form Builder is located in the Application tab and is described in more detail in [Part 2, Bonita Studio Form Builder](#).

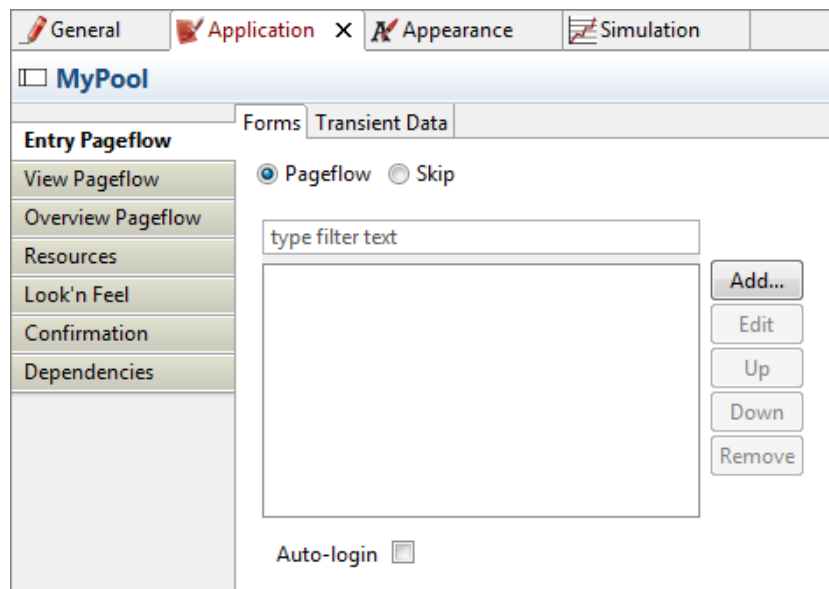


Figure 7. Detail Panel Example: Application tab at the Pool level

## 2.4.3 Appearance

The **Appearance** tab allows you to change the color and font of the text labels in the Pool and Step.

## 2.4.4 Simulation

The **Simulation** tab is used to define the parameters needed to develop and run a simulation of the process.

## 2.5 Menu bar

The Menu bar allows you to choose actions from drop-down menus.

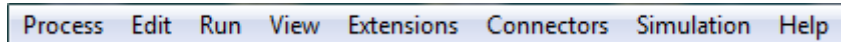


Figure 8. Bonita Open Solution Menu bar

Process	<i>Open, save, import and export, print, and more</i>
Edit	<i>Undo, redo, copy, paste, and more</i>
Run	<i>Run, deploy, preview forms, open User Experience and more</i>
View	<i>Reset the Whiteboard and panels if you have minimized any of them</i>
Extensions	<i>Browse and add or remove processes, resources, and more from the Community</i>
Connectors	<i>Create, edit, test, import connectors, <b>selectors</b>, filters, and more</i>
Simulation	<i>Manage, import, export simulation resources and run simulations</i>
Help	<i>Return to the welcome page, jump to the Help page, find Bonita Studio and Bonita Execution Engine logs</i>

## 2.6 Task bar

Use the Task Bar to start a new Process, *Open* an existing process, *Save, Print, Import, Export, Copy, Paste*, and *Run* a Process. You can also open the User Experience from here, and *Preview Forms* as you design them. Jump to the central Help page or return to the Welcome page from here.

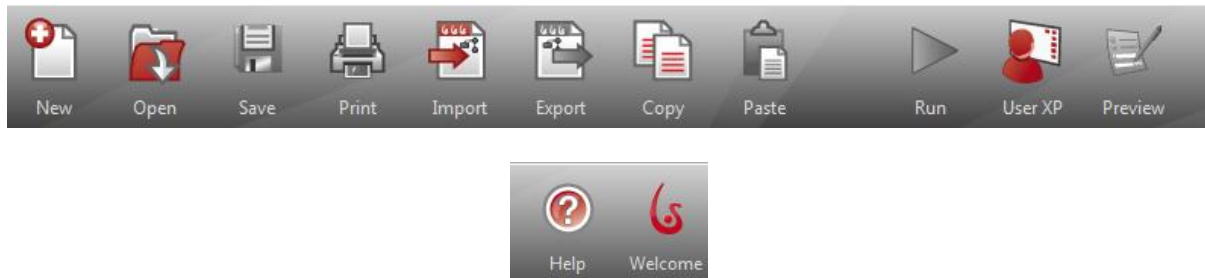


Figure 9. Bonita Open Solution Task bar

## Part 3. Bonita Studio Form Builder

Create Forms for each Step, for the Process initialization, and for overviews during the Process run using the **Form Builder** in Bonita Studio. You can find the Form Builder in the Application tab at the Pool and Step levels. It will appear when you select Add (Entry Pageflow, View Pageflow, or Overview Pageflow) and complete the **Create a new Form** wizard.

Use **Entry Pageflow** to create pages to display to the End User – they allow data entry (interactive). Use **View Pageflow** to create pages that are visible when when you consult Cases in the List of Cases (history) in User Experience.

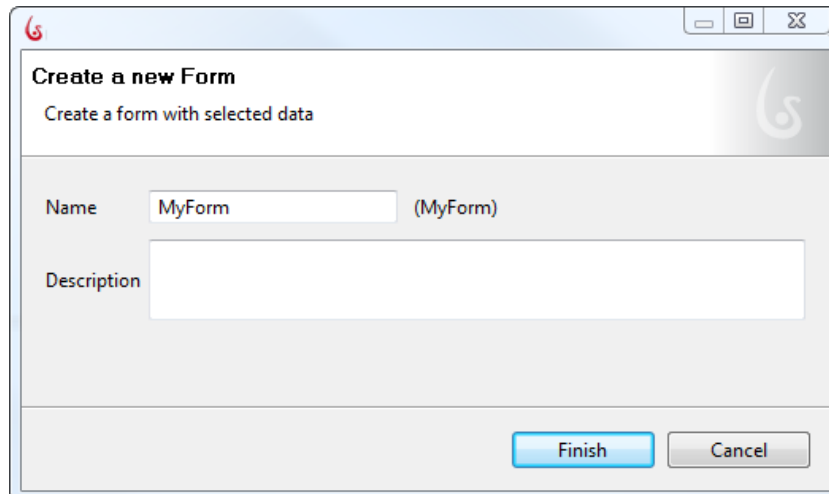


Figure 10. Add a Form

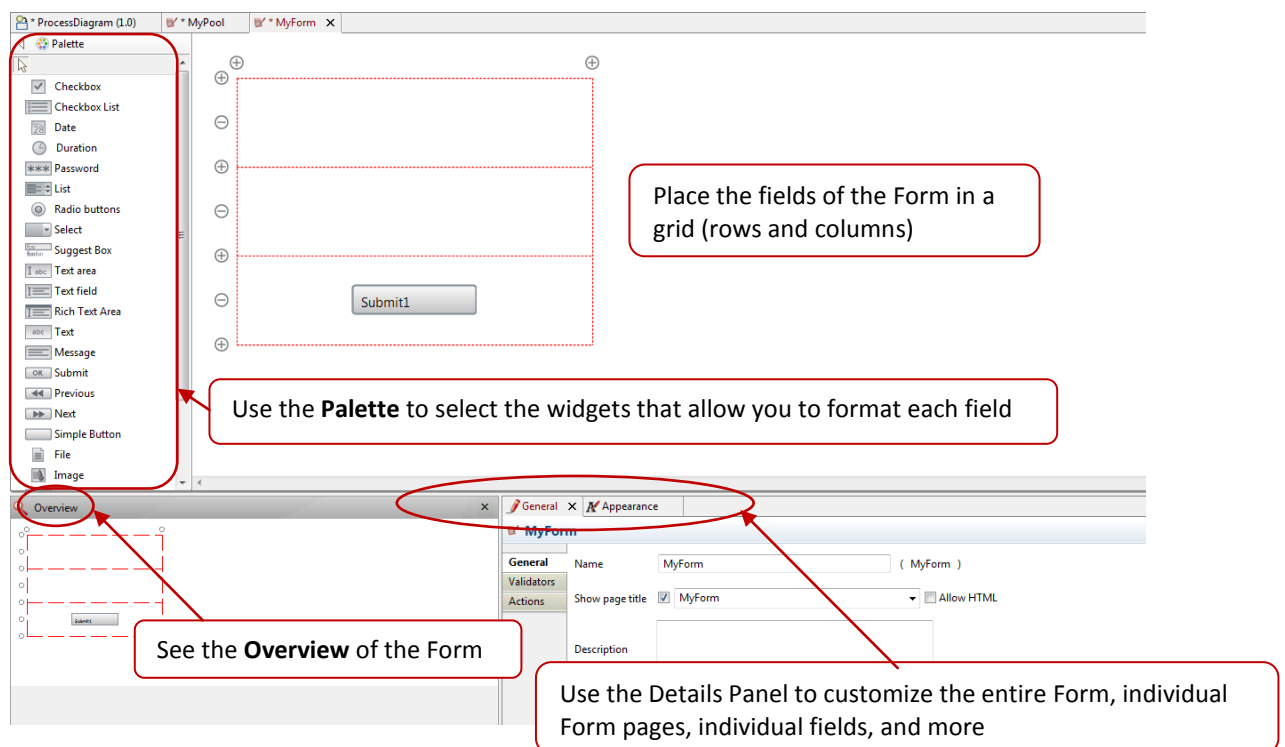


Figure 11. Bonita Studio Form Builder

## 3.1 Form Builder Grid

Add, delete, and move field boxes around the Form builder grid to create rows and columns.

## 3.2 Form Builder Palette

The Form builder Palette contains widgets that can be applied to data fields in the Form using click-and-drag. The widget(s) you can apply depend on the type of variable you've defined; for example: checkbox, drop-down list and Radio buttons can be applied to a List of Options.

### 3.3 Form Builder Details Panel

Use the tabs **General** and **Appearance** in the Form Builder Details Panel to name the Form, add validators to restrict the type of data a field will accept, and customize the appearance of a field.

### 3.4 Form Preview



**Preview** the form by clicking on the **Preview** icon in the Task bar, or by selecting **Run** -> **Preview Form** from the Menu bar.


### 3.5 Forms presented in Web application

Forms are deployed when the Process is Run. The forms are presented in one of the five default Bonita Web Applications. You can change this default to another Bonita Open Solution default model, or deploy Forms in your own Web application.

## Part 4. Bonita User Experience

When you **Run** a Process, it will deploy the Forms you have designed and / or deploy the Bonita User Experience (User XP) portal.

**Run** will deploy the User Experience web application in the embedded server, open the User Experience web page in a web browser, deploy the process web application (with any forms you have created), and start the Process with a web page instead of the Bonita User Experience inbox view.

You can also open Bonita User XP directly from the Task bar . This function will deploy User Experience web application in the embedded server and open the Bonita User Experience inbox view in a web browser.

This portal, which resembles an email inbox, contains information about Process cases as they run task by task. In User XP, tasks are called Steps.

Forms can also be deployed inside User XP Steps, depending on the Process design.

The Bonita User XP portal provides an Inbox and several control panels and dashboards that provide tools for Process and Process Case management. (NOTE: A Process Case contains all information related to a single specific instance of the generic Process.)

There are 2 different default views in Bonita User XP: simple “User View,” and “Administrator View.”

The User XP portal that opens by default is in the “User View,” that is, the version presented to a user with minimal privileges. The Administrator View provides access to other User XP features that allow Process and User management. (Various levels of access to User XP features can be given to or blocked from Users; the view below is the default version.)

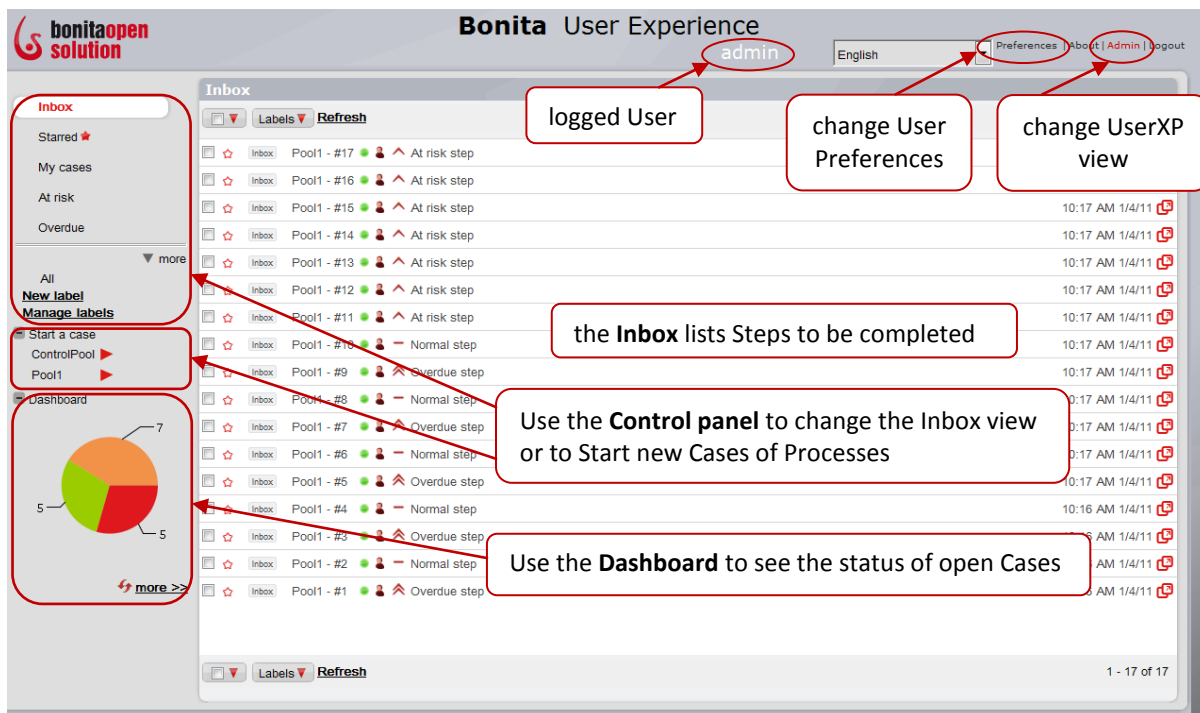


Figure 12. Bonita User Experience – User View

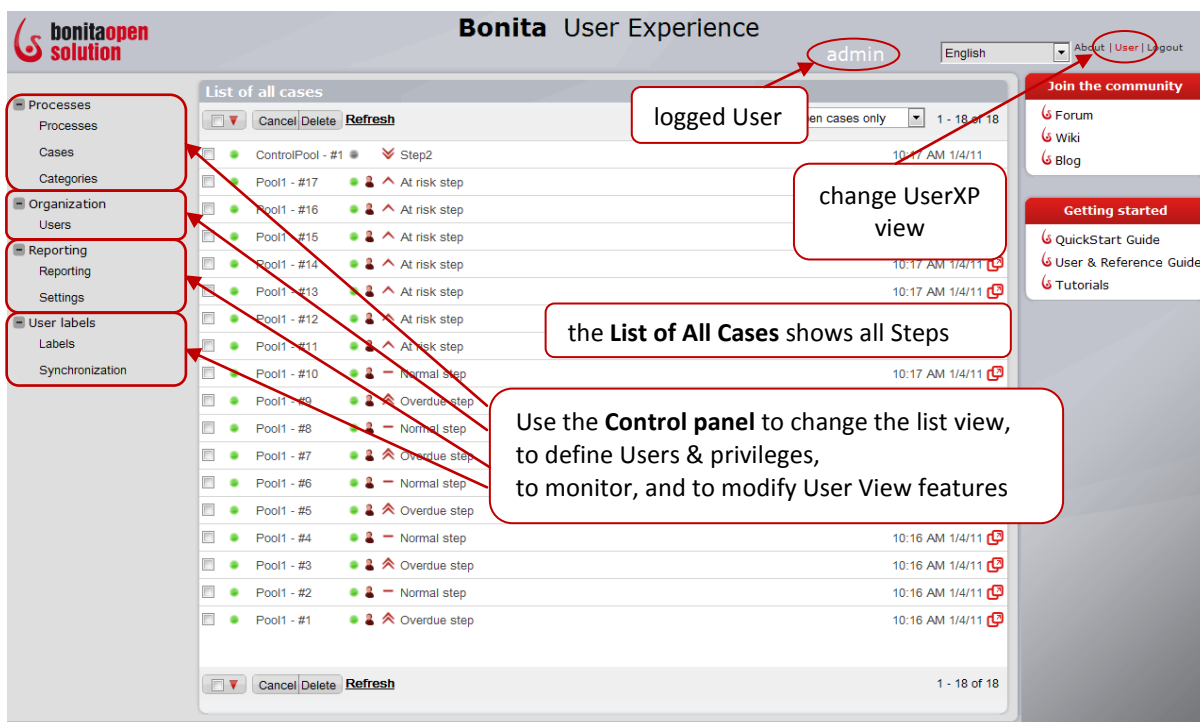


Figure 13. Bonita User Experience – Administration View

## 4.1 Processes

With this control panel, you can:

- Manage Process life cycle
- Manage Steps in open Cases, consult Steps in archived Cases
- Define categories and use them to sort Cases

### 4.2 Organization

Define User names, roles, groups, and other user information.

### 4.3 Reporting

Consult and modify dashboard showing monitored activities.

### 4.4 User Labels

Define whether users can manually assign labels to their cases.

## 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 QuickStart Guide.

For an expanded explanation of the functionalities in Bonita Open Solution, see the [Bonita Open Solution User and Reference 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.  
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*Have fun with Bonita!*