

Automação de processos – BonitaBPM

Neste laboratório iremos criar um processo de solicitação de cartão de crédito utilizando o BonitaBPM 7.2.1.

Para realizar o download da versão community acesse <http://www.bonitasoft.com/> e cadastre uma conta gratuita.

O processo de solicitação de cartão de crédito possui três papéis:

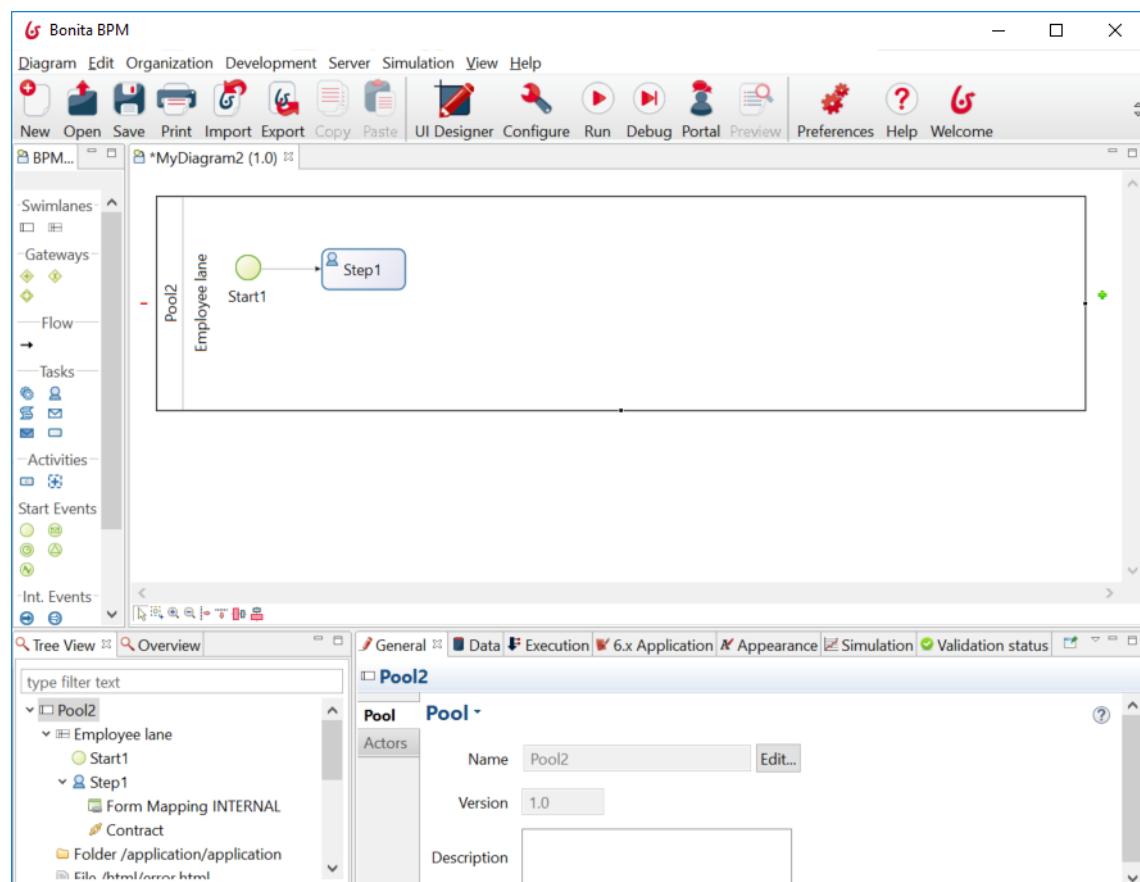
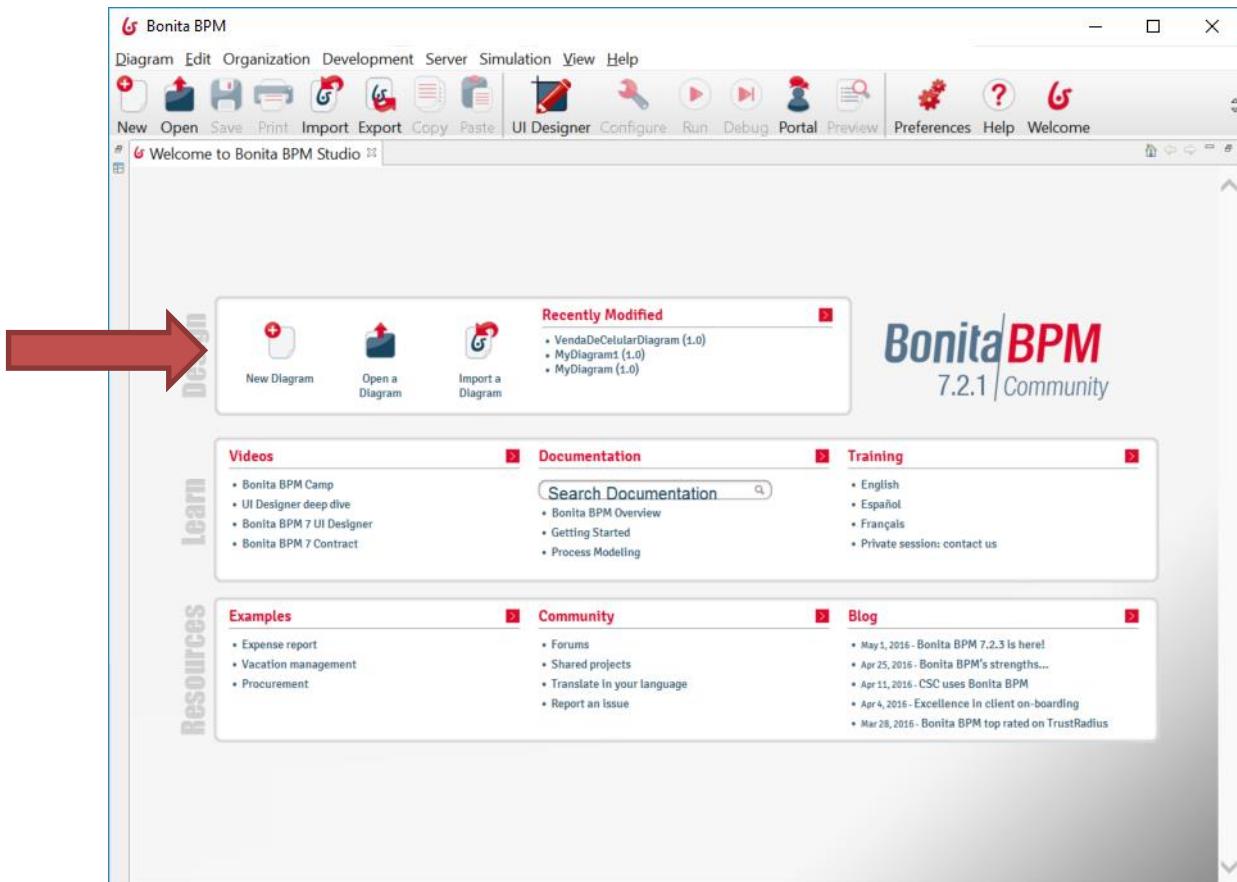
1. *O vendedor do televendas que recebe as ligações e preenche o formulário inicial com os dados do cliente;*
2. *O analista de backoffice que recebe o comprovante de endereço e de rendimento do cliente através de e-mail e anexa na solicitação;*
3. *E por último, o analista de crédito que aprova ou reaprova a solicitação e em caso de aprovação, define o limite de crédito do cartão.*

O formulário inicial deve ter os dados a seguir do cliente:

- Nome do cliente;
- Data de nascimento;
- CPF;
- Telefone de contato;
- E-mail;
- Endereço;
- Renda mensal;
- Profissão.

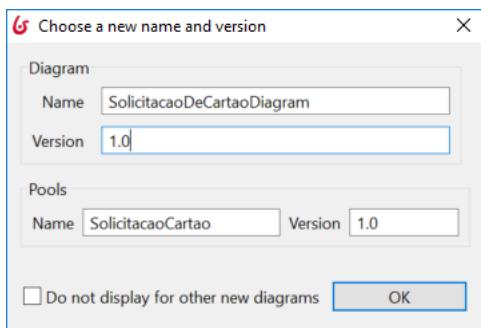
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Abra a IDE do bonitaBPM e clique em New Diagram:



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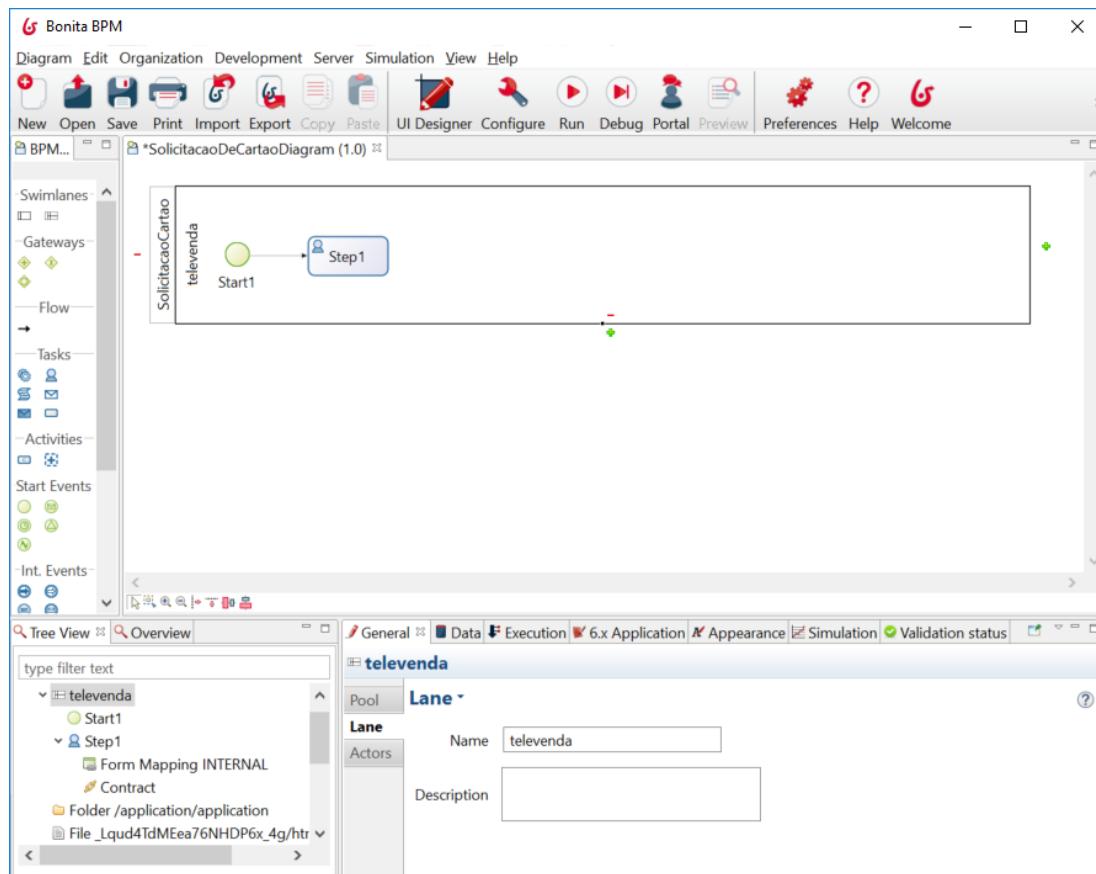
Salve o diagrama, clicando em Save, escolha o nome do diagrama e do pool conforme janela a seguir:



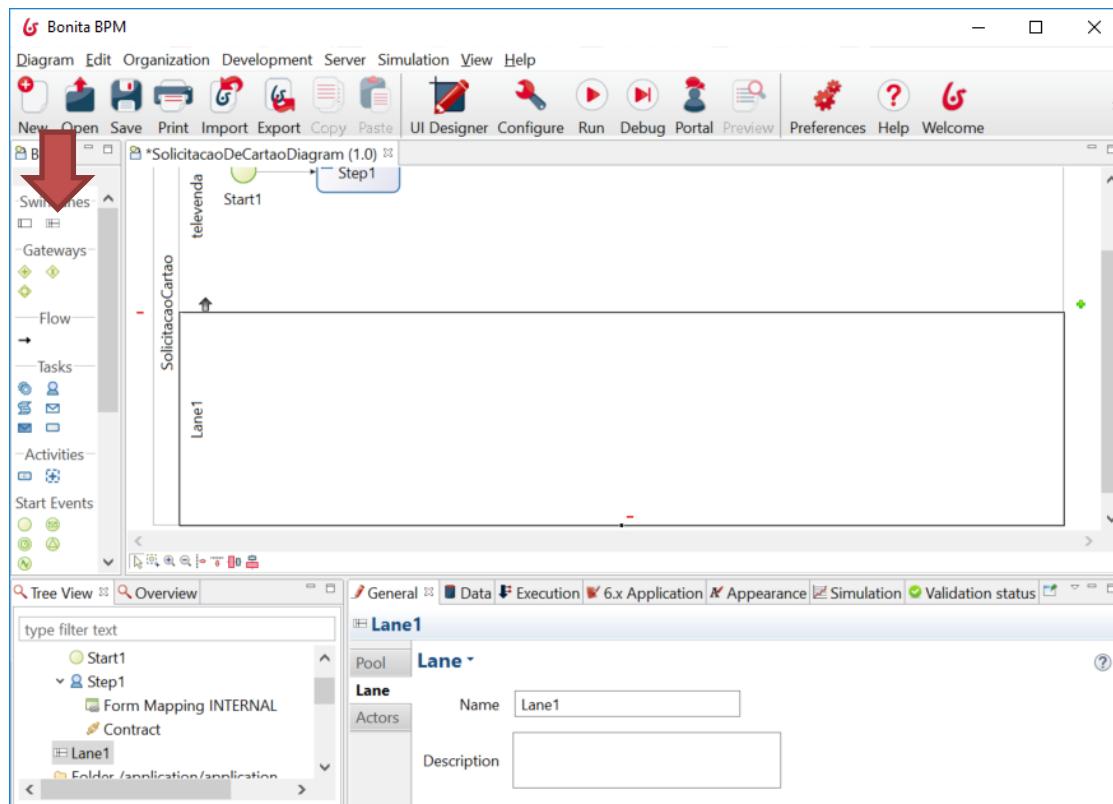
The main window displays a process diagram titled "SolicitudDeCartaoDiagram (1.0)". The diagram consists of a single employee lane named "SolicitudCartao". It starts with a green circle labeled "Start1" which transitions to a blue rounded rectangle labeled "Step1". The left sidebar contains toolbars for swimlanes, gateways, flows, tasks, activities, and start events. The bottom pane shows the "Tree View" and "General" tabs for the "SolicitudCartao" pool. The "General" tab displays the following information:
Pool
Name: SolicitudCartao
Version: 1.0
Description:

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Clique na raia Employee lane, encontre no menu inferior a aba General, submenu Lane, e altere o nome para televenda:

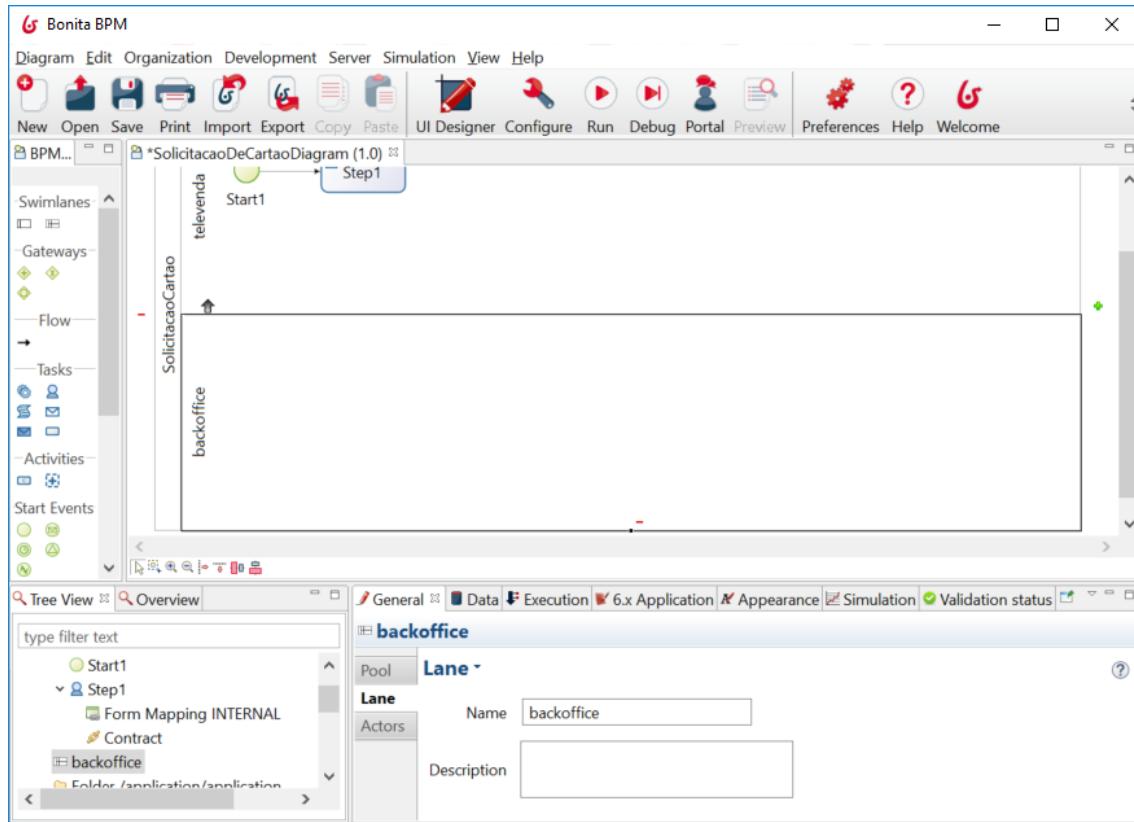


Adicione mais uma raia clicando no ícone lane e arrastando para baixo da raia televenda:

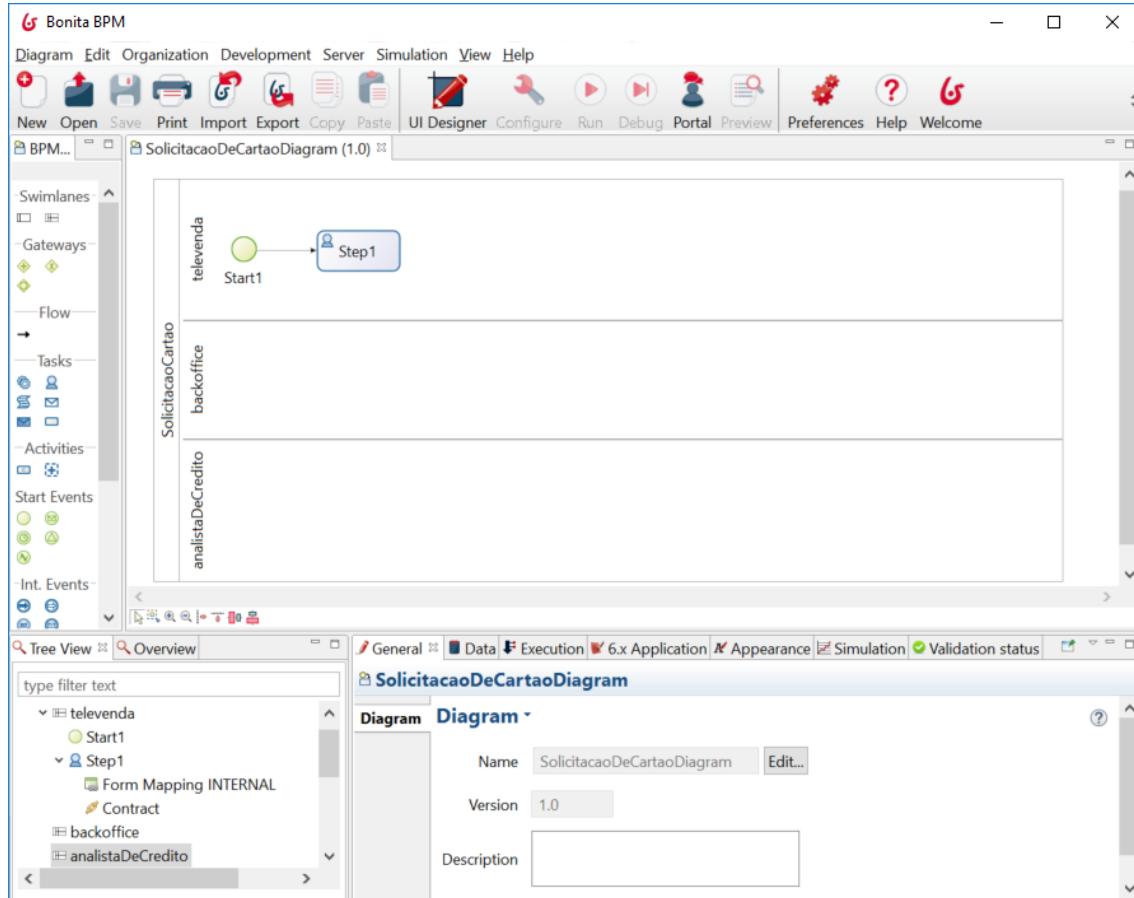


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Renomeie a raia para backoffice da mesma forma que foi feito na raia televenda:

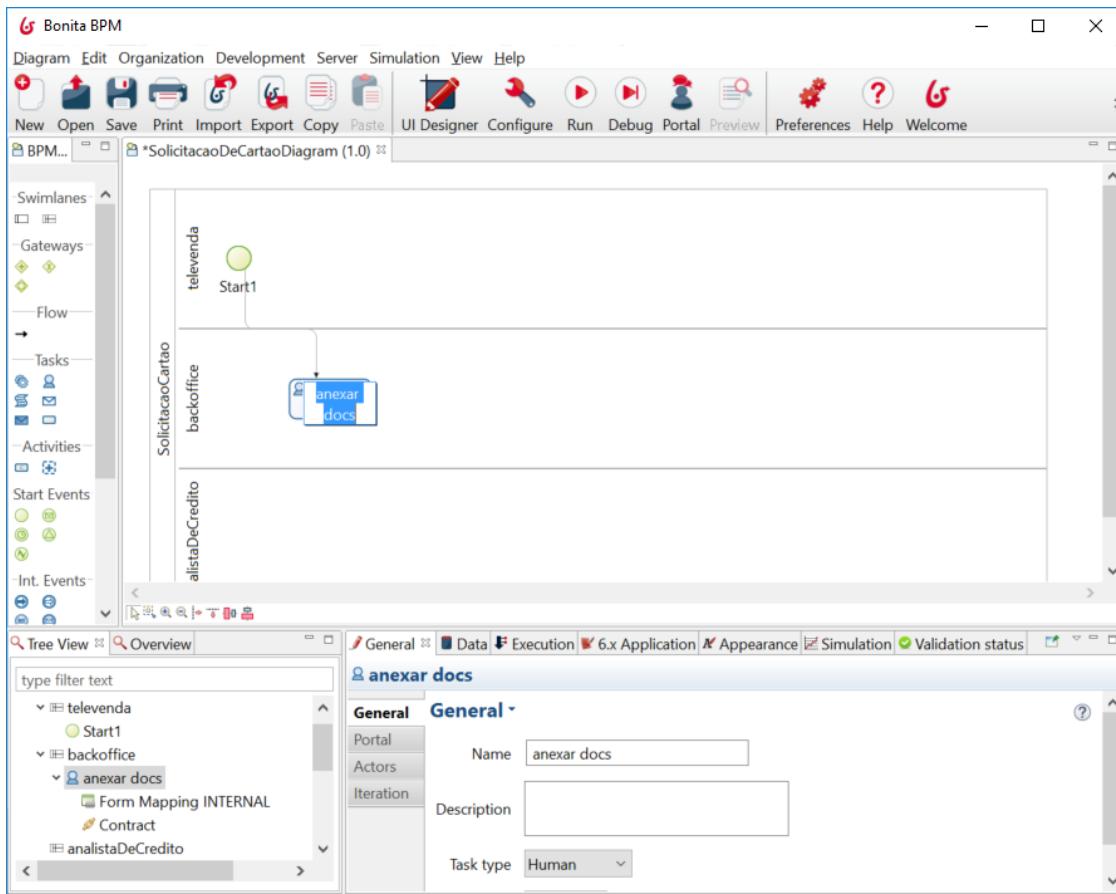


Adicione mais uma raia para analistaDeCredito:

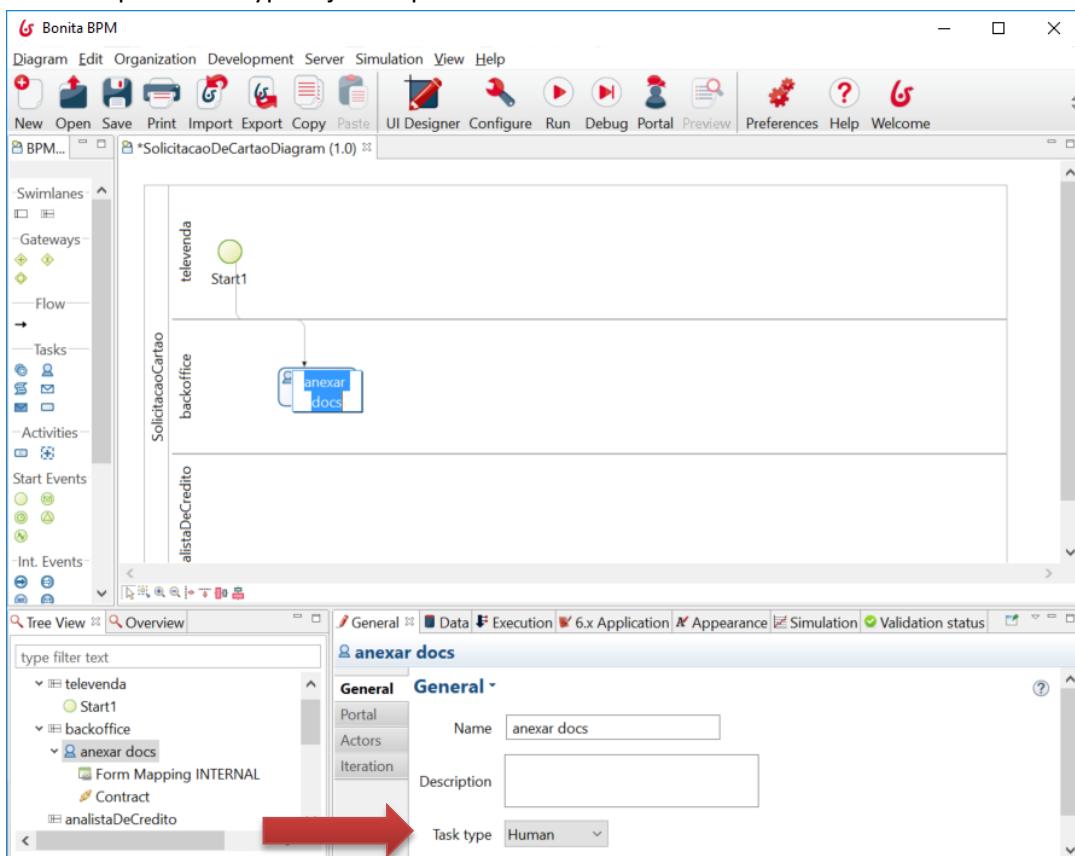


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Arraste a human task Step 1 para a raia do backoffice e renomeie para “anexar docs”:

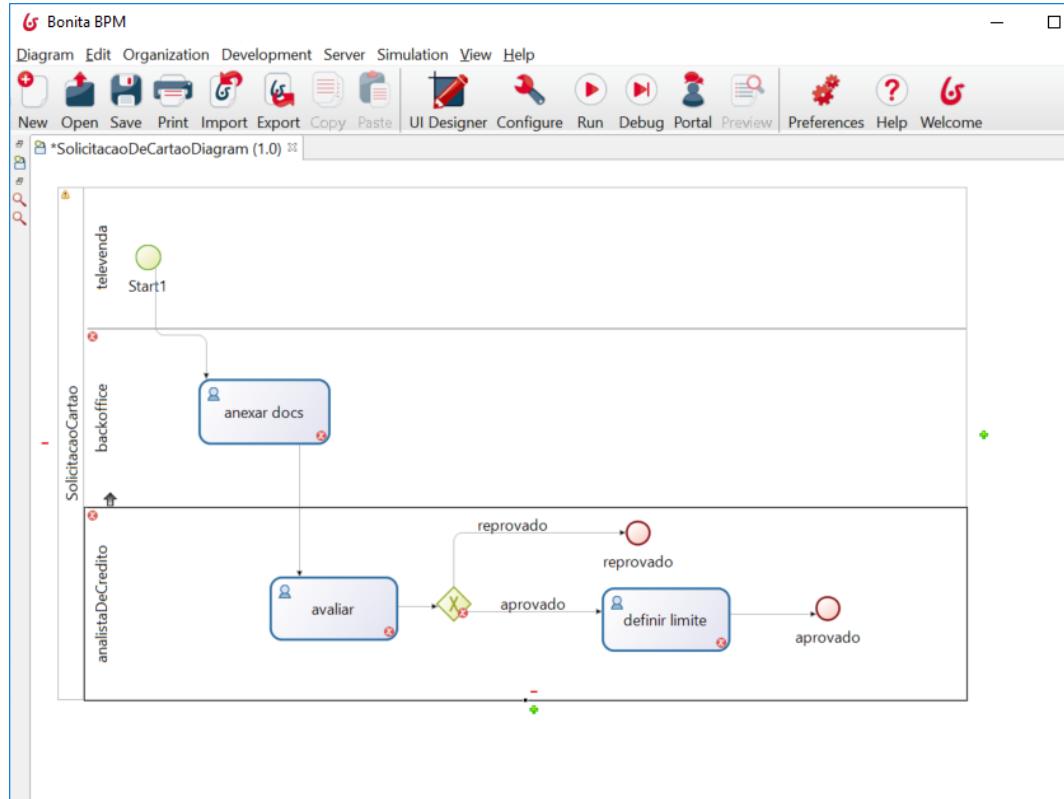


Garanta que o Task type seja do tipo human:



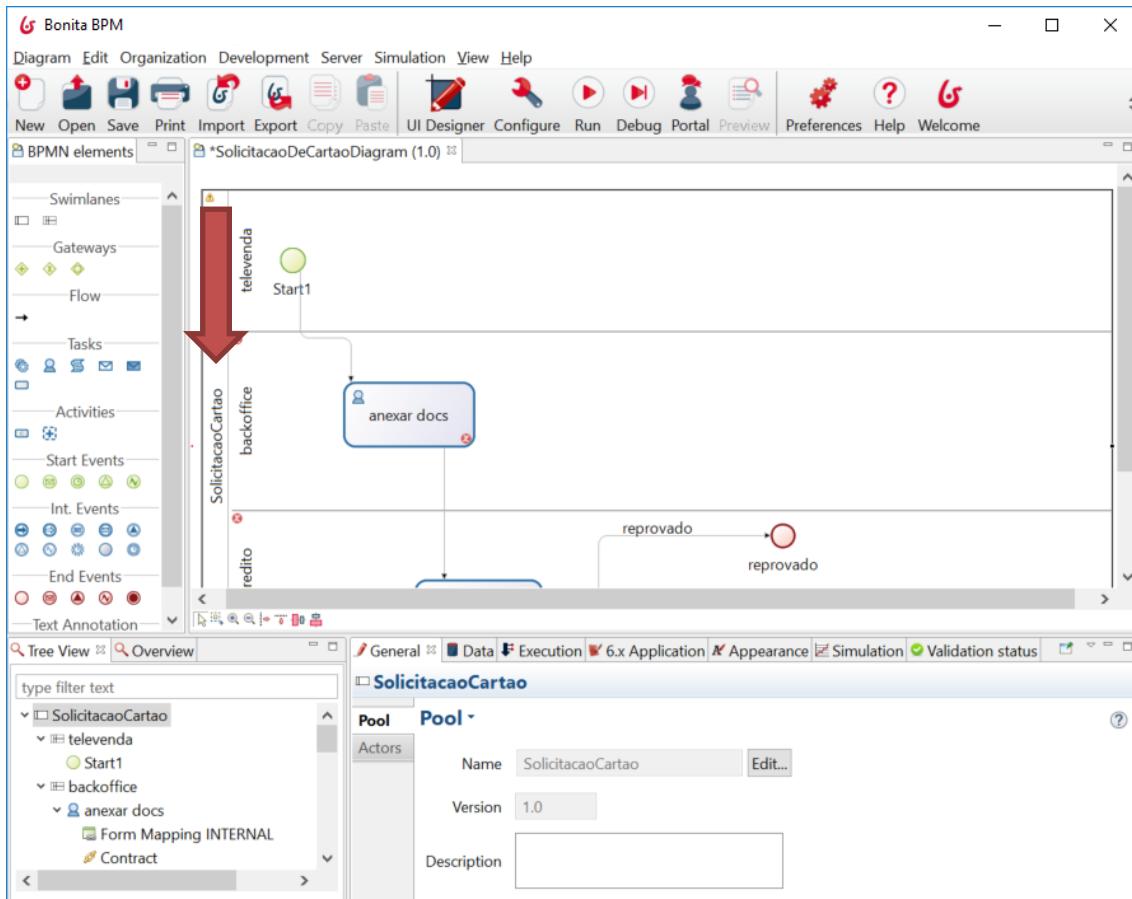
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Depois, na raia do analista de crédito, adicione uma task *avaliar*, um gateway exclusivo, uma task *definir limite* e dois eventos de fim conforme apresentado na figura abaixo:



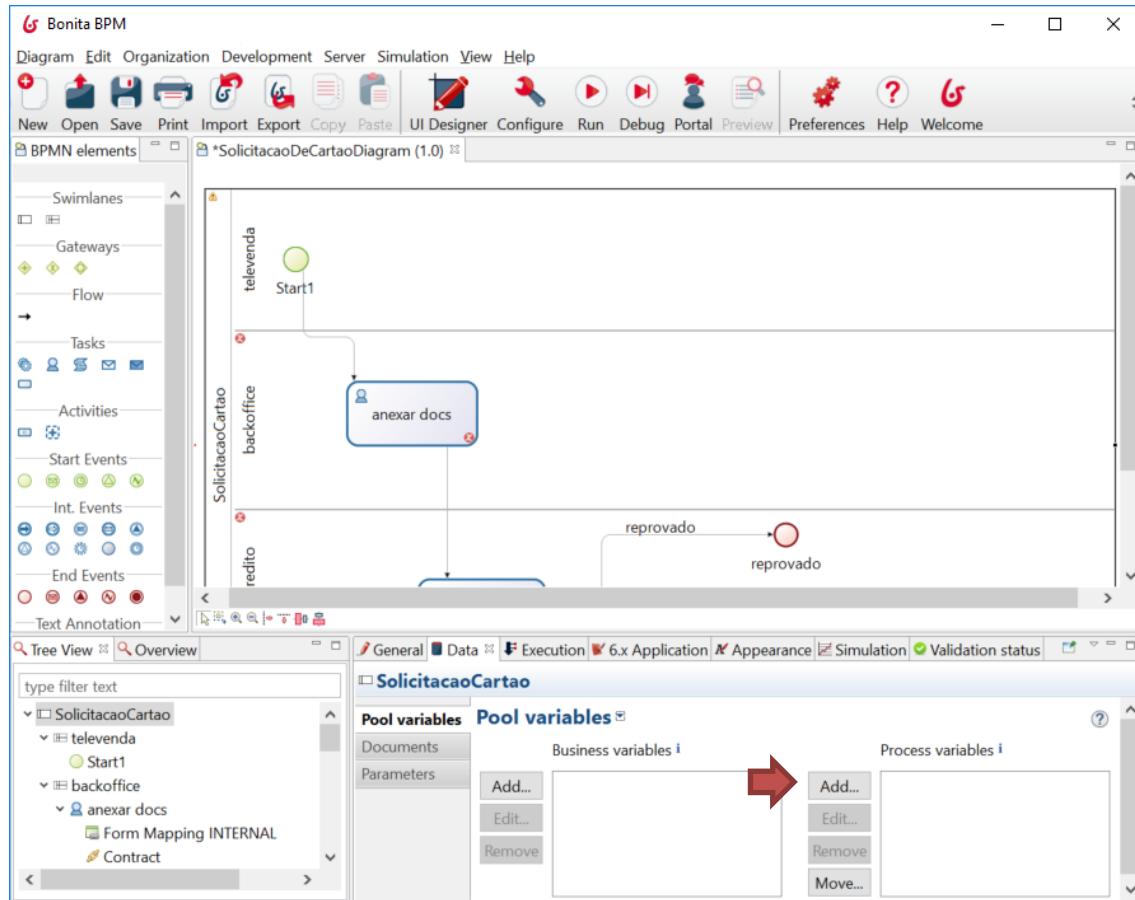
Definindo variáveis do processo

Selecione o pool **SolicitacaoCartao**, clicando no label **SolicitacaoCartao** na barra do pool a esquerda:



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Clique no menu inferior, aba Data:



Vamos adicionar as variáveis listadas no início desse documento, mais as variáveis abaixo:

- Aprovado;
- Comentários análise de crédito;
- Limite Aprovado;

Para isso clique em Add... no menu inferior, parte Process variables:

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New variable

Add a new variable to SolicitudCartao

Add a new variable

Name * nomeCliente

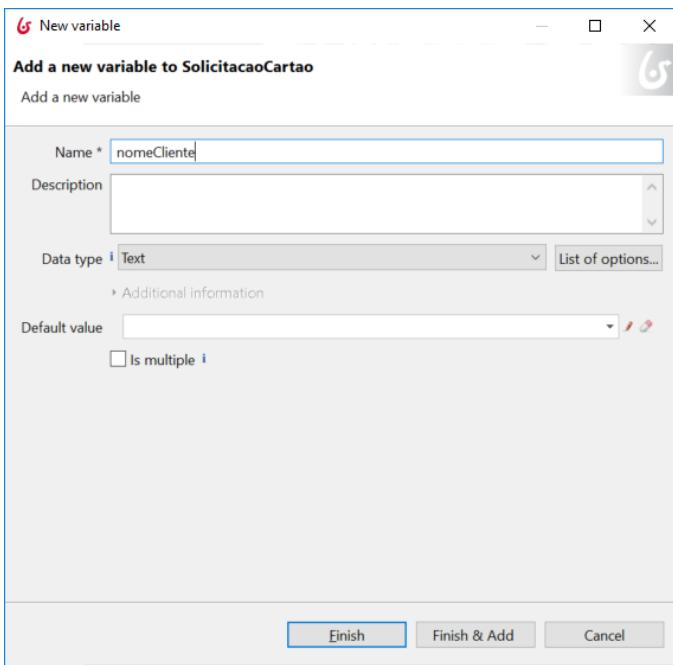
Description

Data type Text

Default value

Is multiple

Finish Finish & Add Cancel



Clique Finish & Add e adicione cada campo conforme figura abaixo:

Bonita BPM

Diagram Edit Organization Development Server Simulation View Help

New Open Save Print Import Export Copy Paste UI Designer Configure Run Debug Portal Preview Preferences Help Welcome

General Data Execution 6.x Application Appearance Simulation Validation status

SolicitudCartao

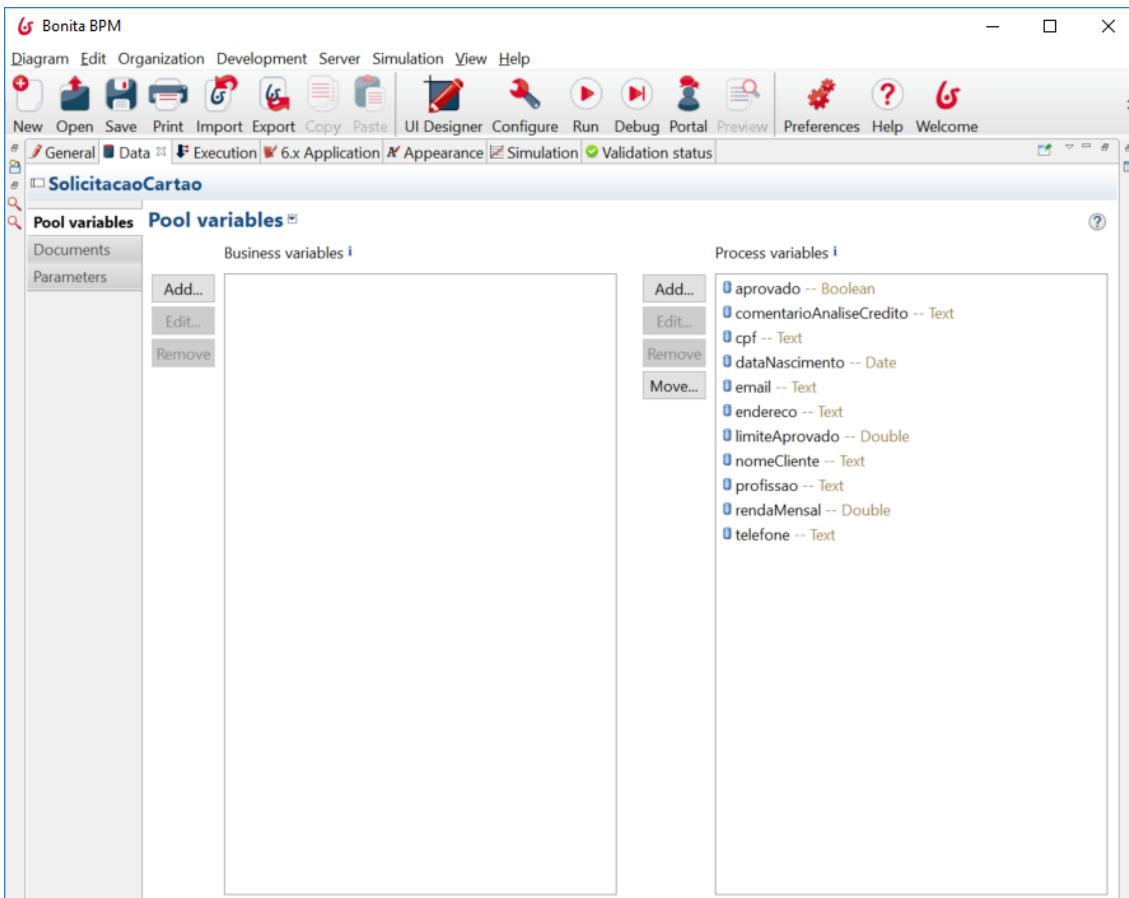
Pool variables

Business variables

Add... Edit... Remove Move...

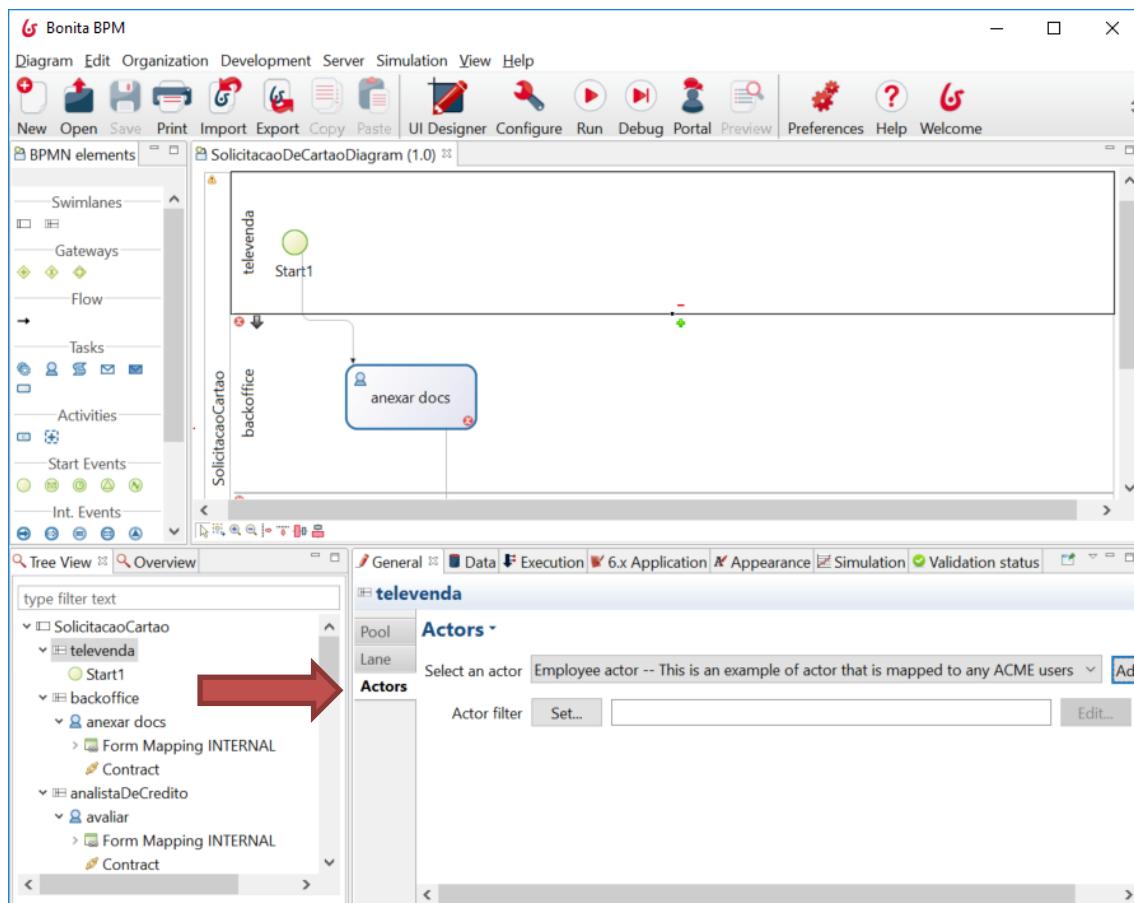
Process variables

- aprovado -- Boolean
- comentarioAnaliseCredito -- Text
- cpf -- Text
- dataNascimento -- Date
- email -- Text
- endereco -- Text
- limiteAprovado -- Double
- nomeCliente -- Text
- profissao -- Text
- rendaMensal -- Double
- telefone -- Text



Criação de formulários

Para criar o formulário inicial que será preenchido por usuários de televendas clique na raia de televendas e submenu Actors:



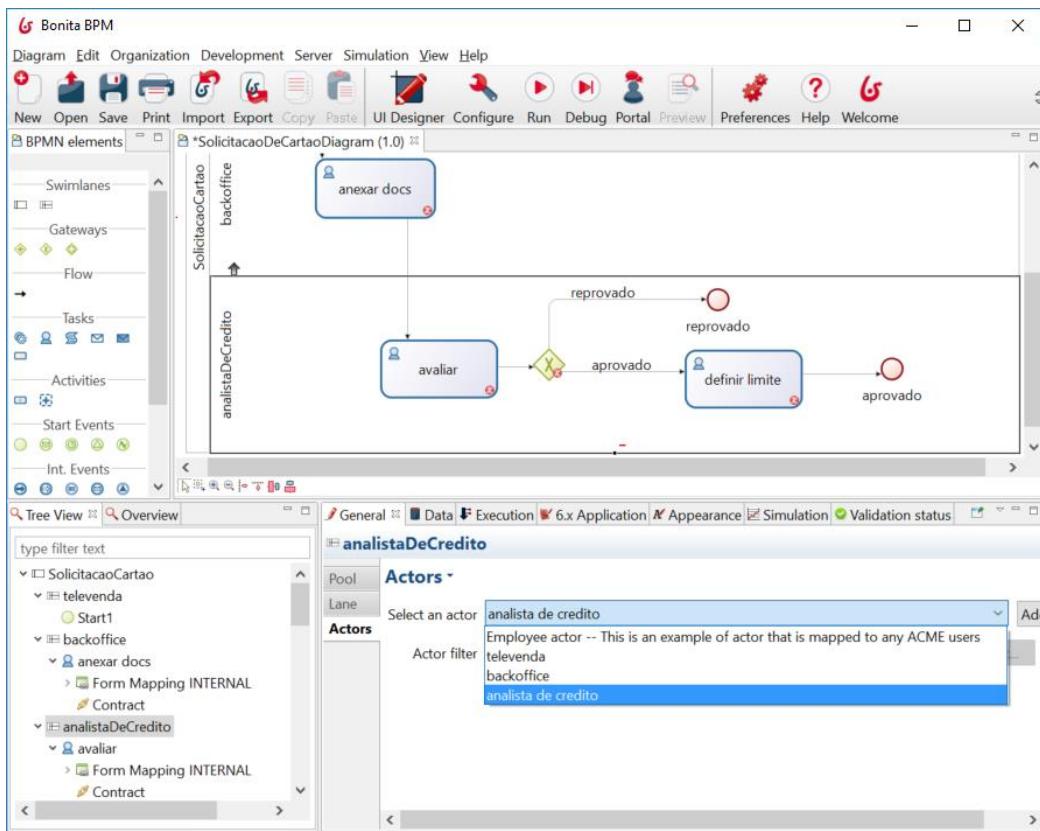
Adicione o ator televenda e marque a opção Set as initiator:

This screenshot shows the 'New actor' dialog. It has fields for 'Name' (set to 'televenda') and 'Description'. At the bottom, there's a checkbox labeled 'Initiator' with the sub-option 'Set as initiator' checked. There are 'Finish' and 'Cancel' buttons at the bottom right.

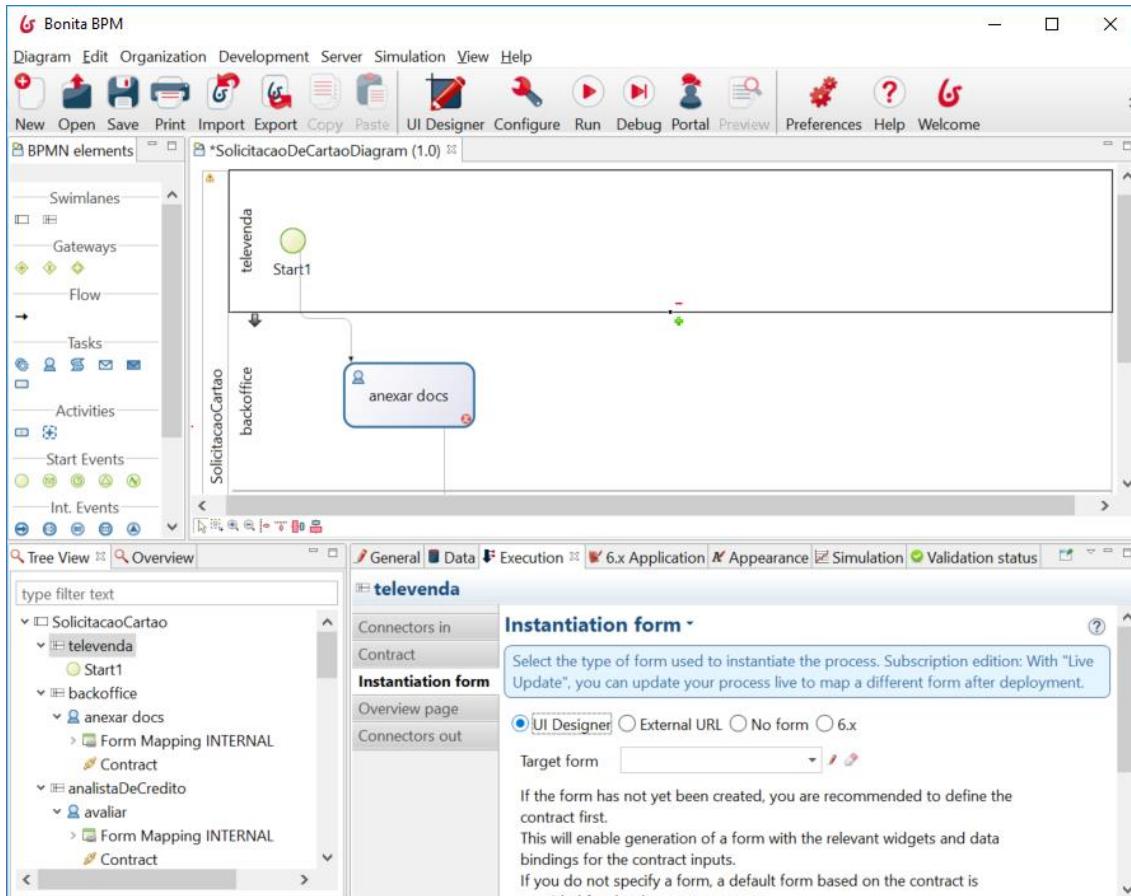
Entre na raia backoffice e adicione o ator backoffice (sem marcar initiator).

Faça analogamente para a raia televendas, ou seja, crie o ator sem marcar como initiator....

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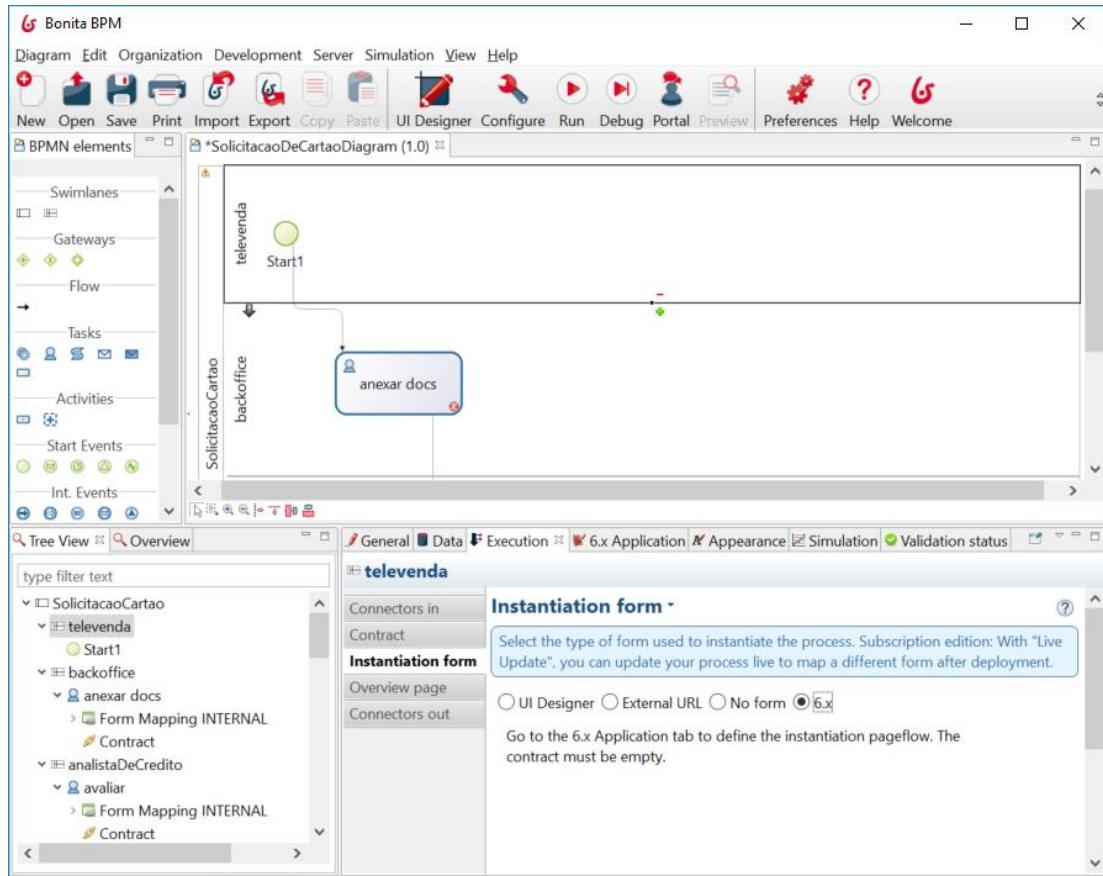


Volte para a raiz de televenda, no aba inferior Execution:

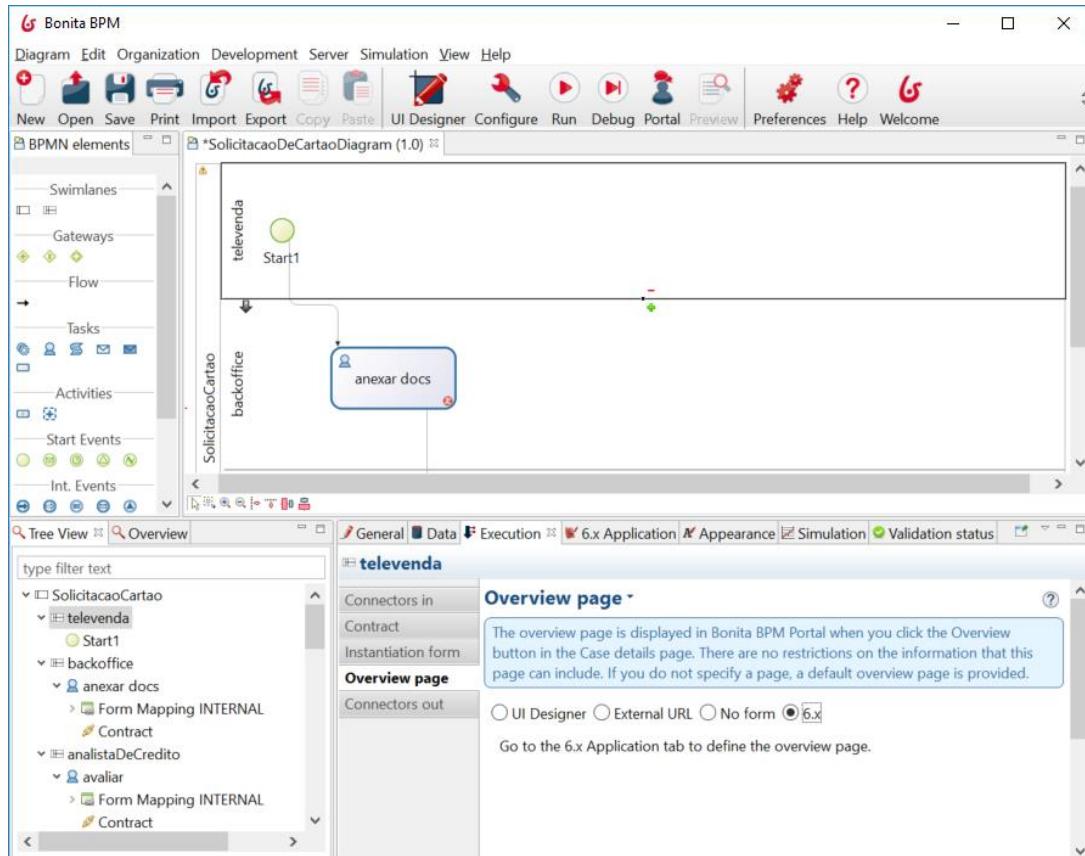


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Submenu Instalation form e escolha a opção 6.x (versão antiga do bpm)

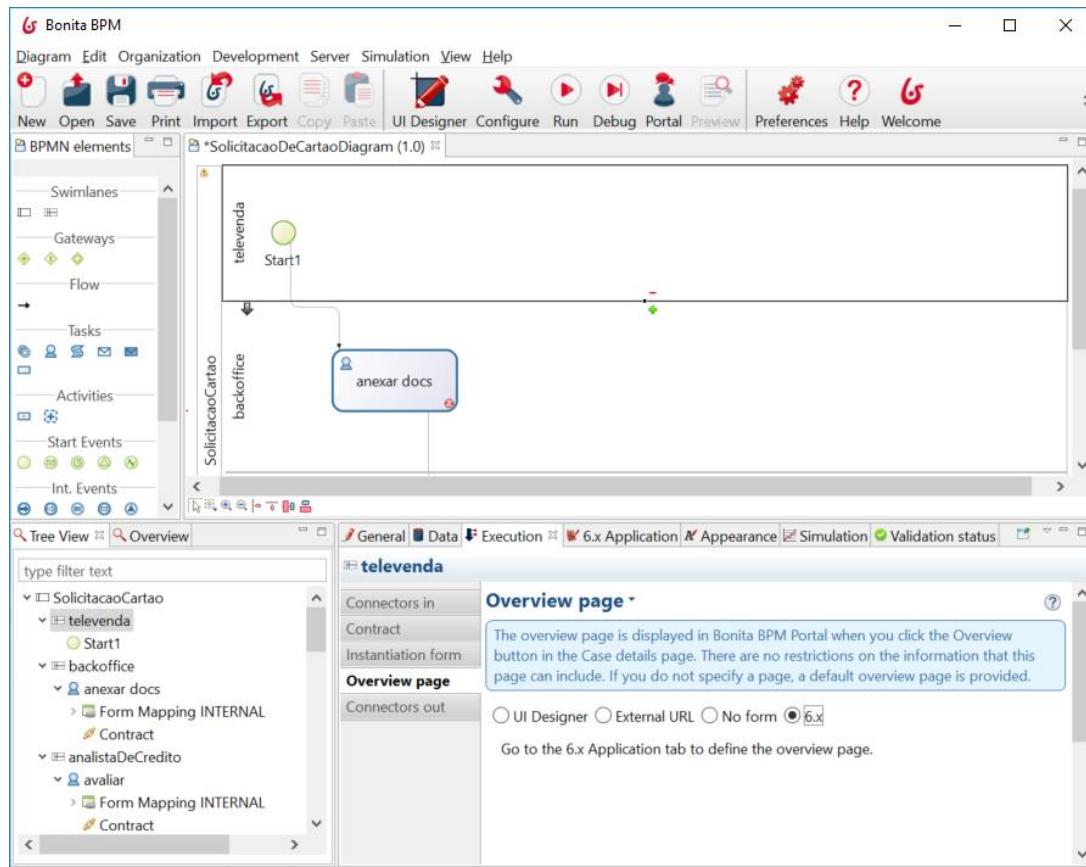


Escolha o submenu Overview page e também selecione 6.x

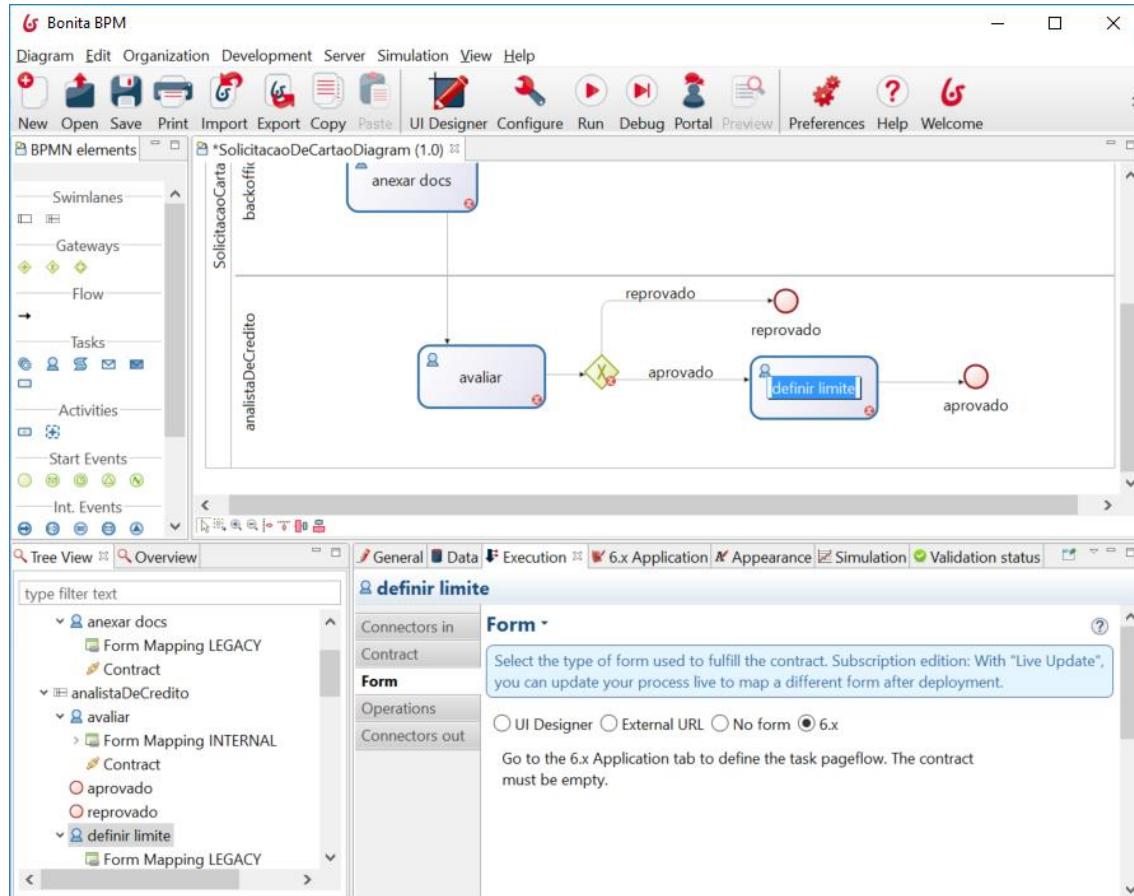


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Clique na task *anexar docs*, menu forms, escolha 6.x:

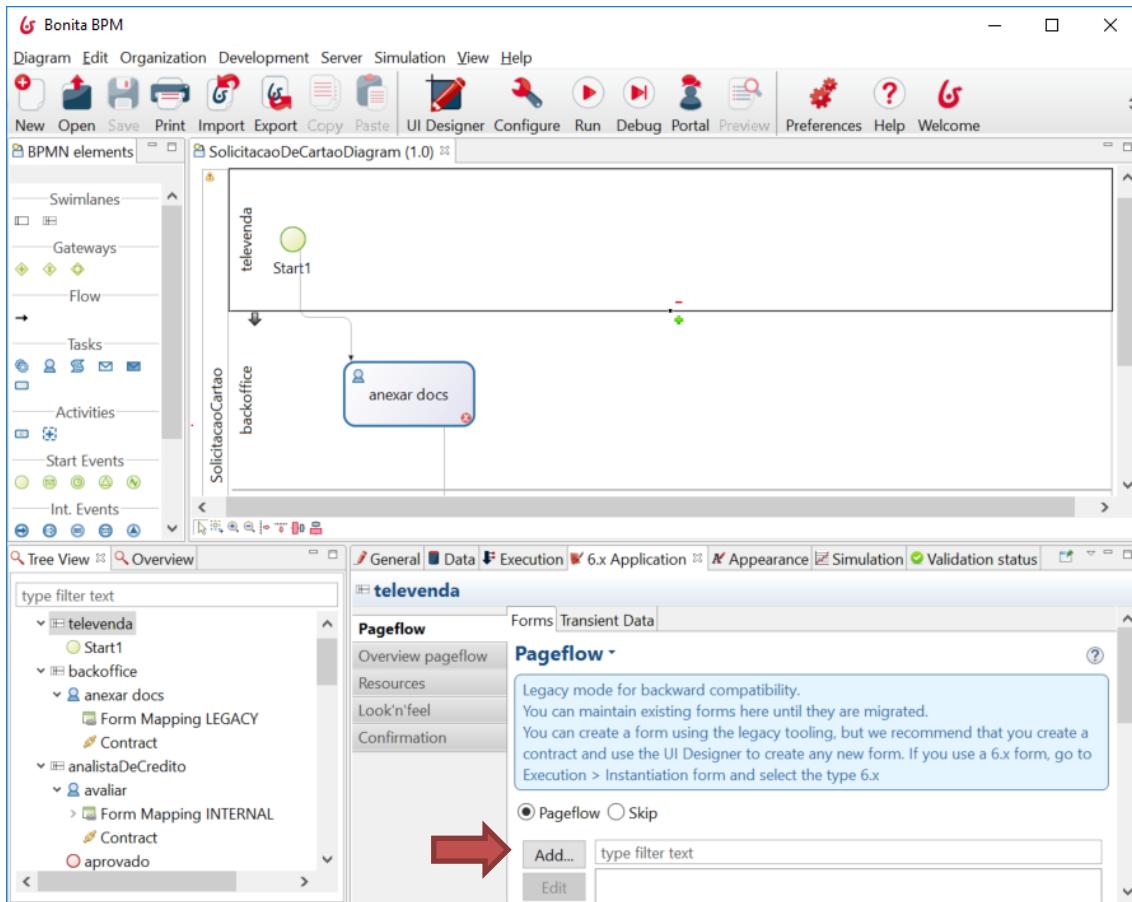


Faça o mesmo para task definir limite:



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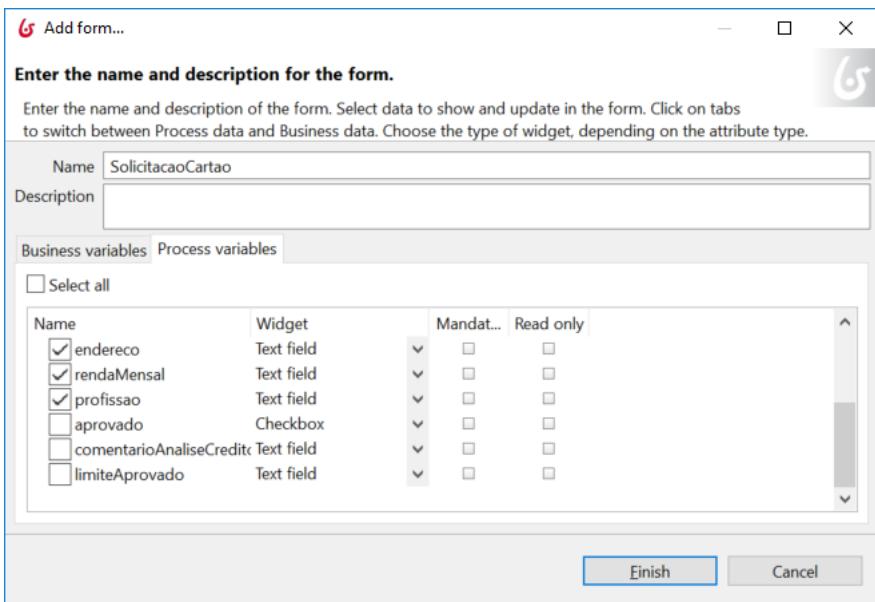
Agora, clique na raia do teleatendimento, menu 6.x Application, e clique em Add...



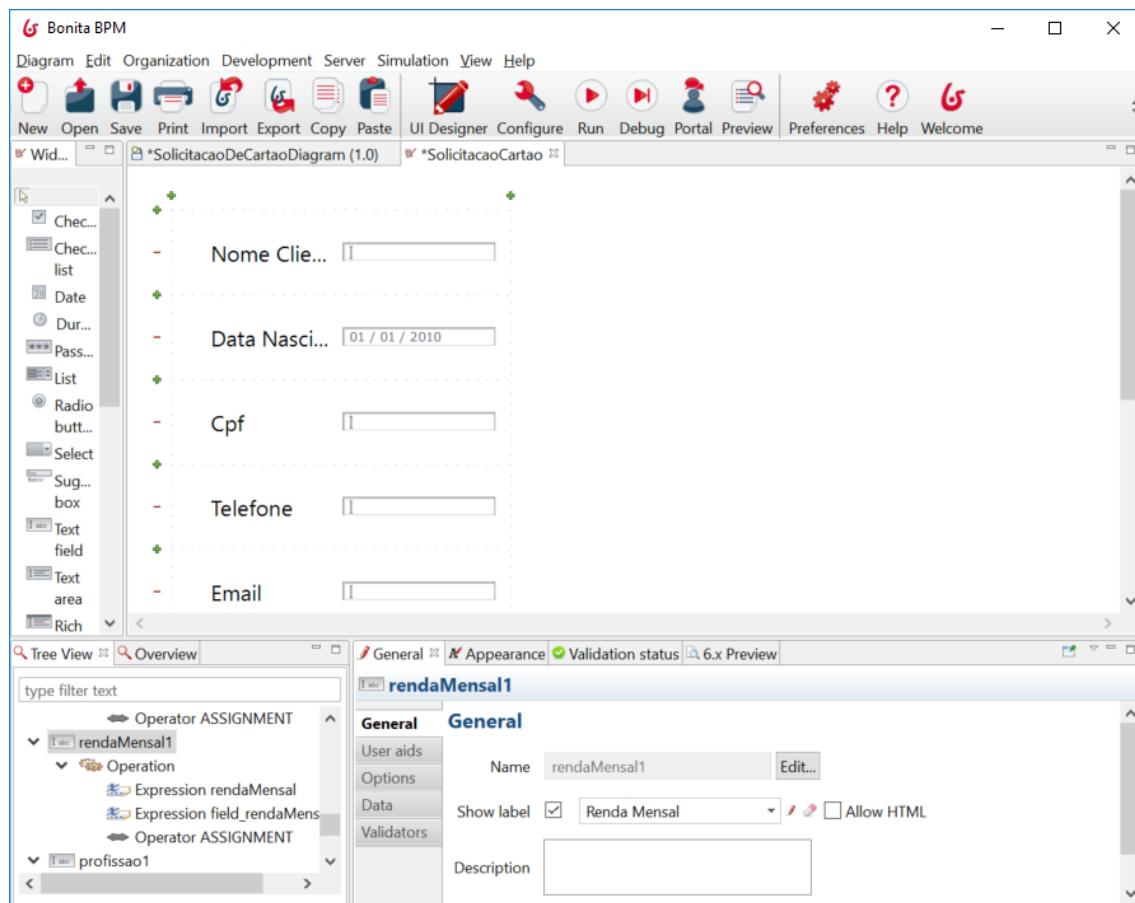
The screenshot shows the 'Add form...' dialog box. It has fields for 'Name' (set to 'SolicitacaoCartao') and 'Description'. Below these are tabs for 'Business variables' and 'Process variables', with a note stating 'No business data available.' At the bottom are 'Finish' and 'Cancel' buttons.

Escolha o menu Process variable e selecione todas as variáveis, exceto as 3 últimas:

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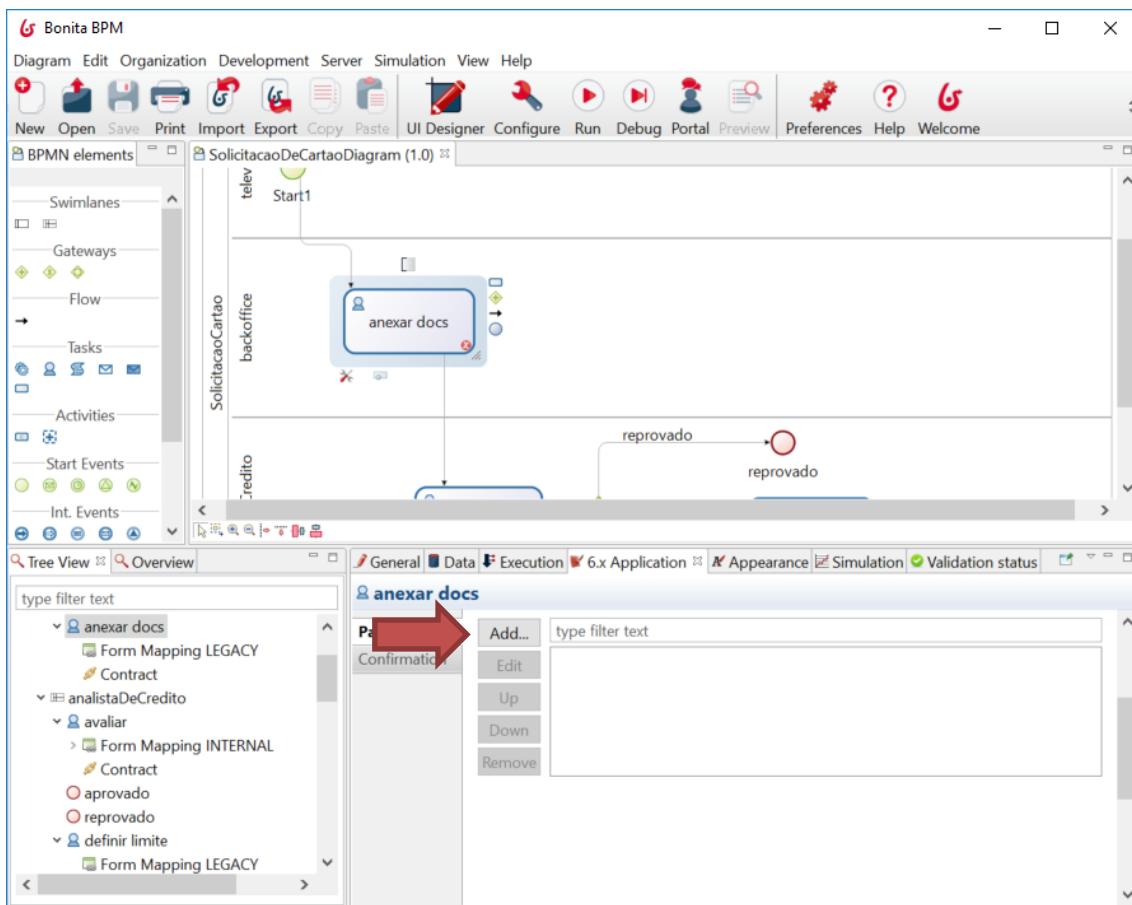
Clique em finish e será exibido o editor de formulário:



Feche o editor e volte para o diagrama do processo.

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Vamos criar o formulário do backoffice, para isso clique na task *anexar docs*, menu Pageflow e em Add...



Selecione as variáveis exibidas abaixo:

This screenshot shows the "Add form..." dialog box. At the top, it says "Enter the name and description for the form." Below that, there are fields for "Name" (set to "anexar docs") and "Description".

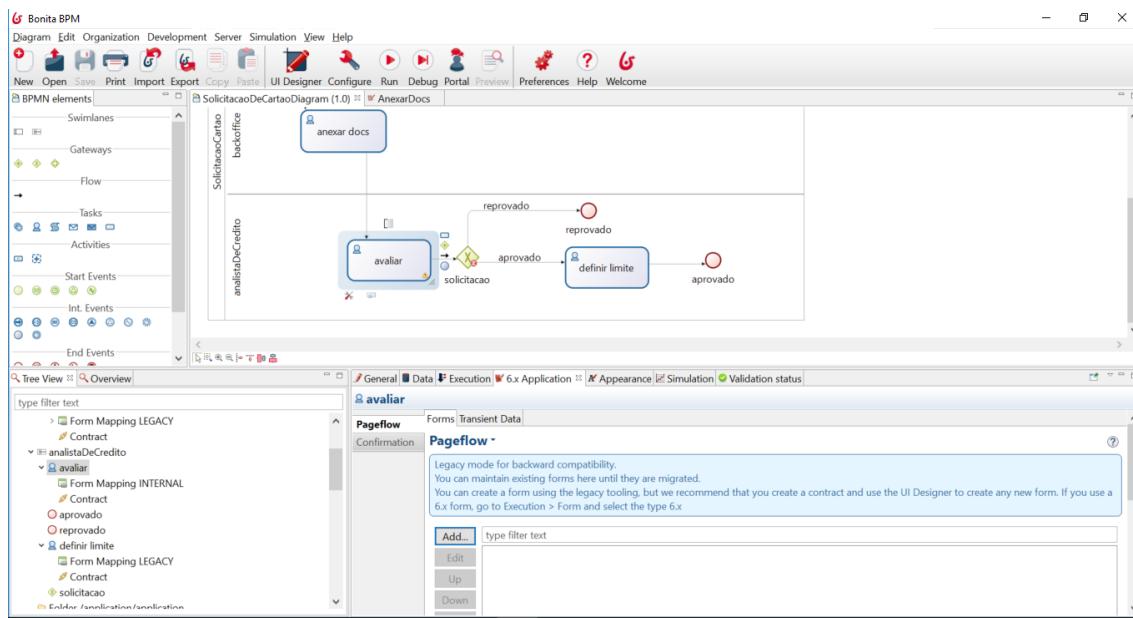
Under the "Business variables" tab, there's a checkbox "Select all" and a table listing variables with their types and widget configurations. The table includes columns for Name, Widget, Mandat..., and Read only.

Name	Widget	Mandat...	Read only
nomeCliente	Text field	<input checked="" type="checkbox"/>	<input type="checkbox"/>
dataNascimento	Date	<input type="checkbox"/>	<input type="checkbox"/>
cpf	Text field	<input type="checkbox"/>	<input type="checkbox"/>
telefone	Text field	<input type="checkbox"/>	<input type="checkbox"/>
email	Text field	<input checked="" type="checkbox"/>	<input type="checkbox"/>
endereco	Text field	<input checked="" type="checkbox"/>	<input type="checkbox"/>
rendaMensal	Text field	<input checked="" type="checkbox"/>	<input type="checkbox"/>
profissao	Text field	<input checked="" type="checkbox"/>	<input type="checkbox"/>
aprovado	Checkbox	<input type="checkbox"/>	<input type="checkbox"/>
comentarioAnaliseCredit	Text field	<input type="checkbox"/>	<input type="checkbox"/>

At the bottom of the dialog are "Finish" and "Cancel" buttons.

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Vamos criar o formulário de avaliação do analista de crédito, para isso clique na task avaliar, adicionar formulário:



This screenshot shows the 'Add form...' dialog for the 'avalizar' task. The title bar says 'Add form...'. The main area is titled 'Enter the name and description for the form.' It asks to enter the name and description of the form, and provides tabs for General, Data, Execution, 6.x Application, Appearance, Simulation, and Validation status. Below this, there are fields for 'Name' (set to 'avalizar') and 'Description'. Under 'Business variables' and 'Process variables', there's a table where users can map variables to widgets. The 'Business variables' section lists variables: nomeCliente, dataNascimento, cpf, telefone, email, endereco, rendaMensal, profissao, aprovado, comentarioAnaliseCredit, and limiteAprovado. The 'Process variables' section lists variables: nomeCliente, dataNascimento, cpf, telefone, email, endereco, rendaMensal, profissao, aprovado, comentarioAnaliseCredit, and limiteAprovado. The table columns are Name, Widget, Mandat..., and Read only. At the bottom right are 'Finish' and 'Cancel' buttons.

E por último, vamos criar o formulário da task *definir limite*:

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 Add form...

Enter the name and description for the form.

Enter the name and description of the form. Select data to show and update in the form. Click on tabs to switch between Process data and Business data. Choose the type of widget, depending on the attribute type.

Name: definir limite

Description:

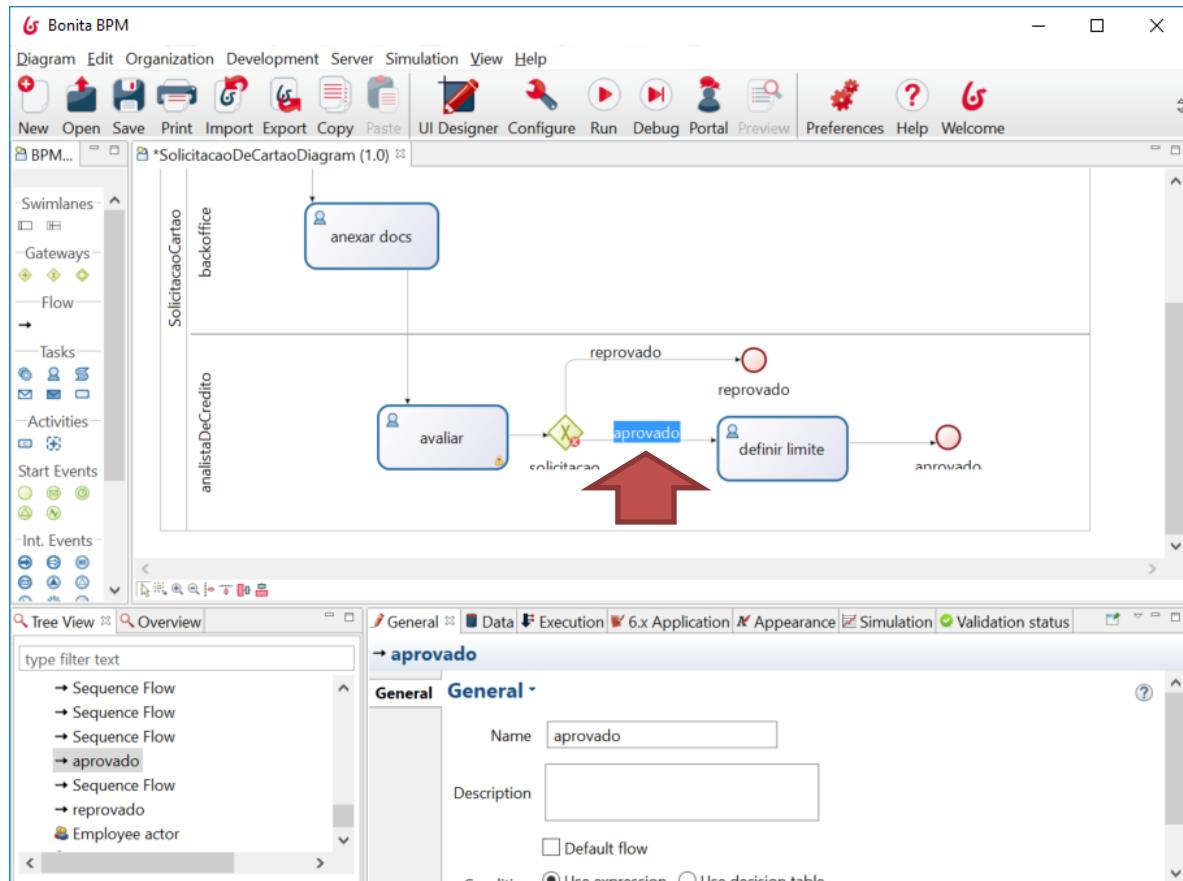
Business variables Process variables

Select all

Name	Widget	Mandat...	Read only
<input checked="" type="checkbox"/> nomeCliente	Text field	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> dataNascimento	Date	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> cpf	Text field	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> telefone	Text field	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> email	Text field	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> endereco	Text field	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> rendaMensal	Text field	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> profissao	Text field	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> aprovado	Checkbox	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> comentarioAnaliseCredit	Text field	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> limiteAprovado	Text field	<input type="checkbox"/>	<input type="checkbox"/>

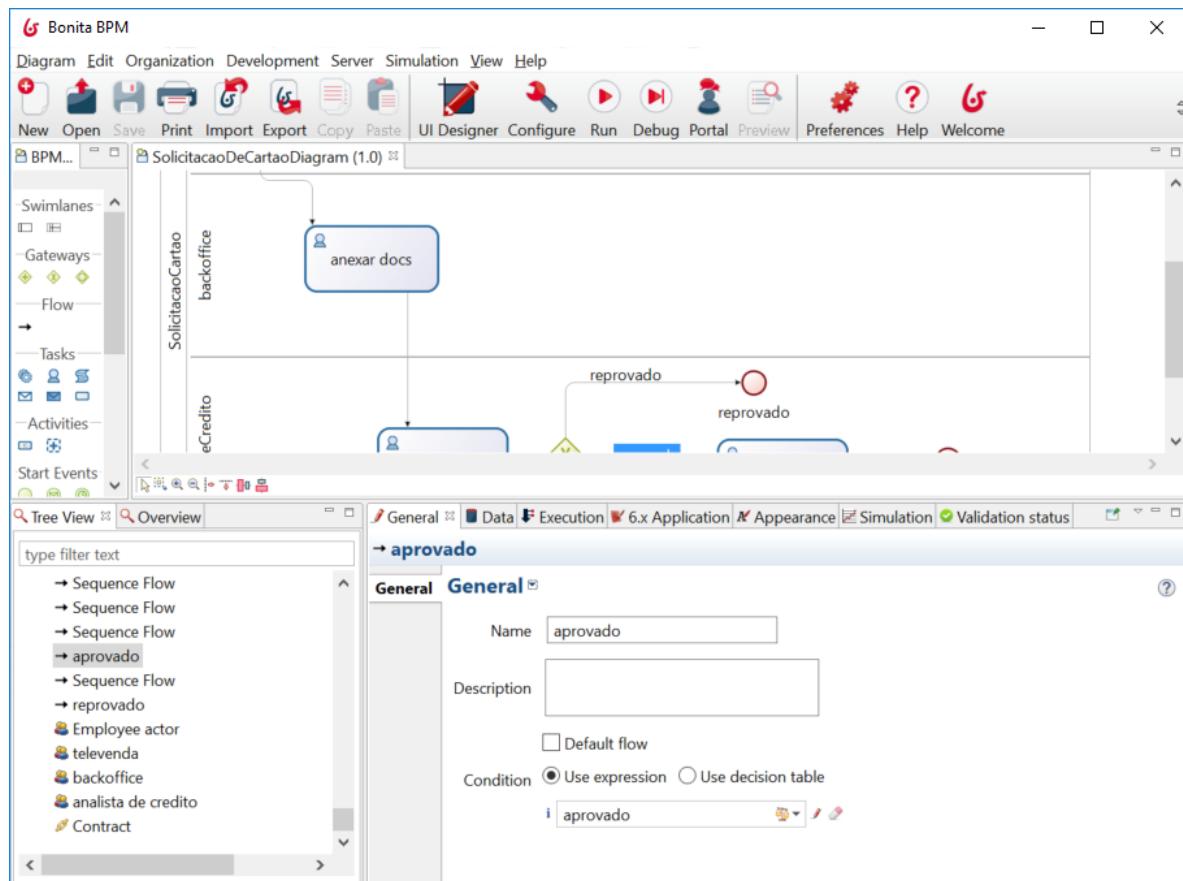
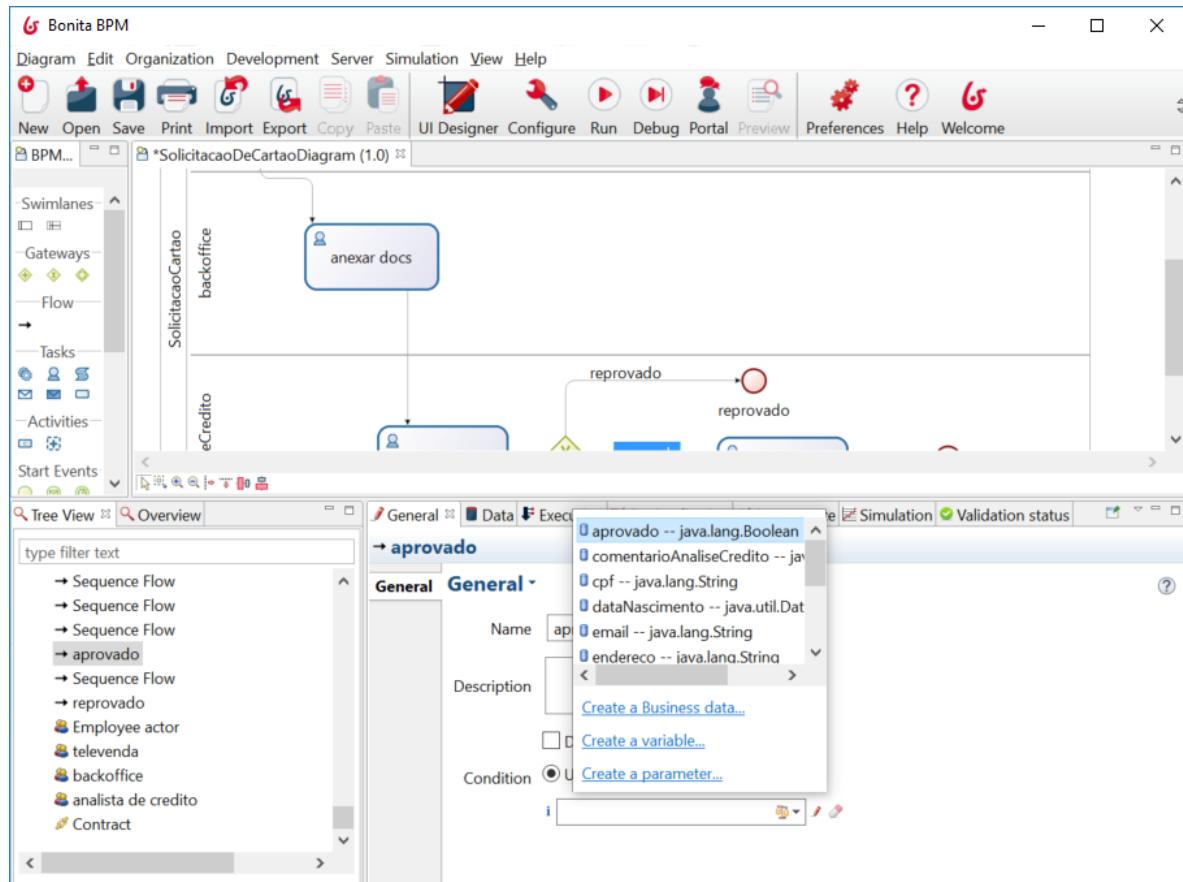
Editando a condição do gateway

Clique no conector que liga o gateway a task definir limite:



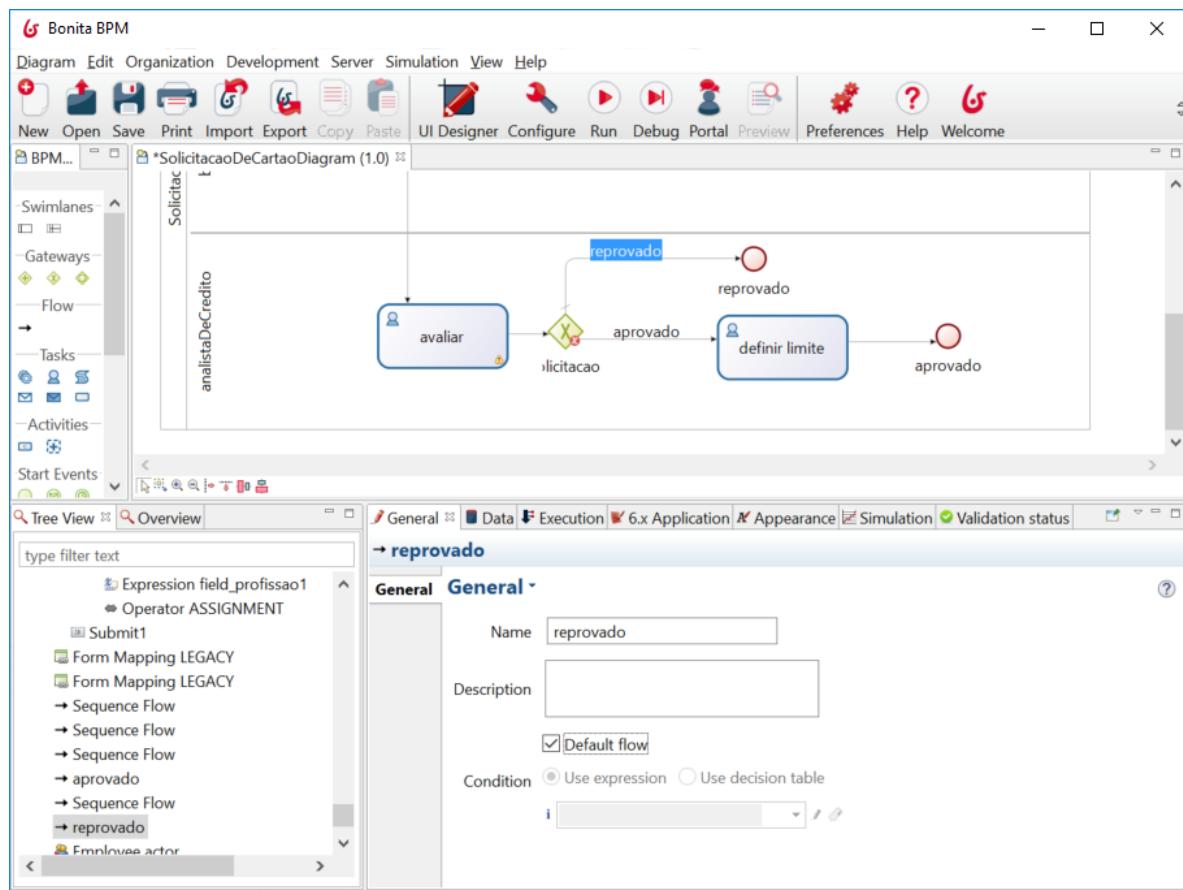
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No campo Condition escolha a variável aprovado



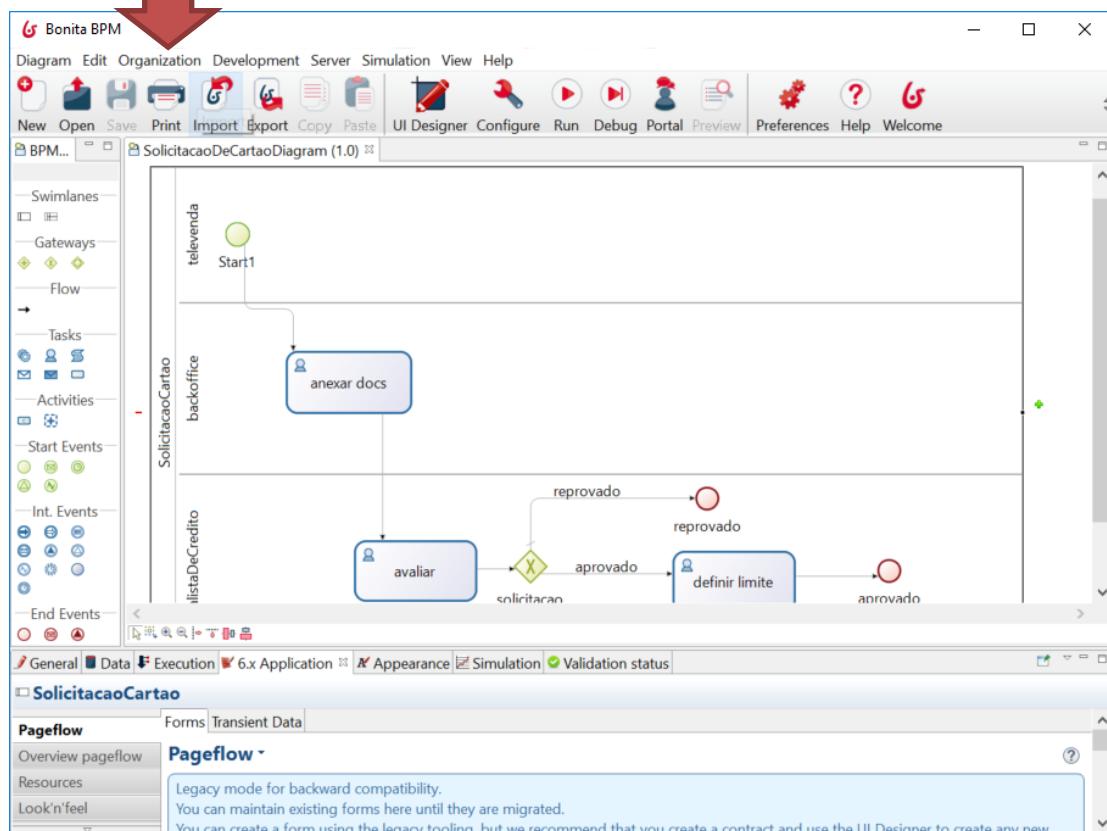
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Clique no conector reprovado e marque como Default flow:



Configuração de usuário

Vamos criar a organização Fiap, para isso clique em Organization → Manage:



Clique em Add e crie a organização fiap

The screenshot shows the 'Manage organizations' dialog box. The title bar says 'Manage organizations'. On the left, there are 'Add' and 'Delete' buttons. The main area is a table with columns 'Name' and 'Description'. One row is selected, showing 'Fiap' in the 'Name' column. At the bottom, there are buttons for '< Back', 'Next >', 'Finish', and 'Cancel'.

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Clique em Next, vamos criar o grupo Group1:

The screenshot shows the 'Organization groups' section of the 'Manage organizations' interface. On the left, there are buttons for 'Add group', 'Add subgroup', and 'Delete'. A search bar labeled 'Search...' is above a list containing 'Group1'. On the right, a 'Details' panel shows fields for 'Name *' (set to 'Group1'), 'Display name' (empty), 'Path' (empty), and 'Description' (empty). At the bottom, there are buttons for '< Back', 'Next >', 'Finish' (highlighted in blue), and 'Cancel'.

Clique em Next e crie as roles: backoffice, credito e televenda:

The screenshot shows the 'Organization roles' section of the 'Manage organizations' interface. On the left, there are buttons for 'Add' and 'Delete'. A search bar labeled 'Search...' is above a table with columns 'Role name', 'Display name', and 'Description'. The table contains three rows: 'backoffice' (Role name: 'backoffice', Display name: 'backoffice'), 'credito' (Role name: 'credito', Display name: 'credito', Description: 'credito'), and 'televenda' (Role name: 'televenda', Display name: 'televenda'). On the right, a 'Details' panel shows fields for 'Name *' (set to 'credito'), 'Display name' (set to 'credito'), and 'Description' (empty). At the bottom, there are buttons for '< Back', 'Next >', 'Finish' (highlighted in blue), and 'Cancel'.

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Vamos agora criar os usuários e associar as roles:

1. Daniel → vendedor
2. Regina → backoffice
3. Maria → credito

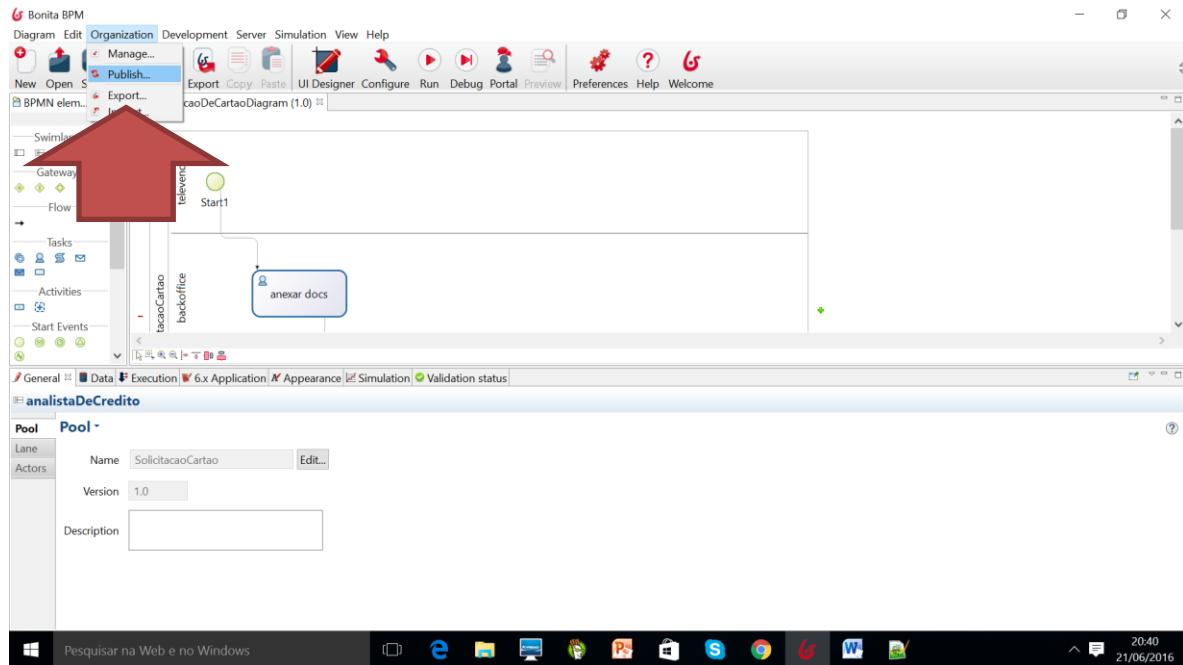
Para isso clique em add, crie o usuário daniel e em membership para associar a role televendas a ele.

The screenshot shows the 'Manage organizations' application interface. On the left, there's a list of users with columns for First name, Last name, and Username. The user 'daniel' is selected. On the right, the 'Details' panel shows the user's information: Username * daniel, Password * (redacted), and Manager (dropdown). Below this, the 'Membership' tab is active, showing Group /Group1 and Role televenda. There's also an 'Add membership...' button. At the bottom, there are navigation buttons: '< Back', 'Next >', 'Finish' (highlighted in blue), and 'Cancel'.

Faça o mesmo para maria e para regina de acordo com seus respectivos papéis e click em finish para finalizar.

Publicando a organização

Para poder utilizar a organização antes é necessário publicá-la. Para isso clique no menu Organization→Publish:



Escolha a associação fiap, clique em next e associe o usuário Daniel para logar no portal (iniciar).

Default user
Select the username that will be used to log in to Portal

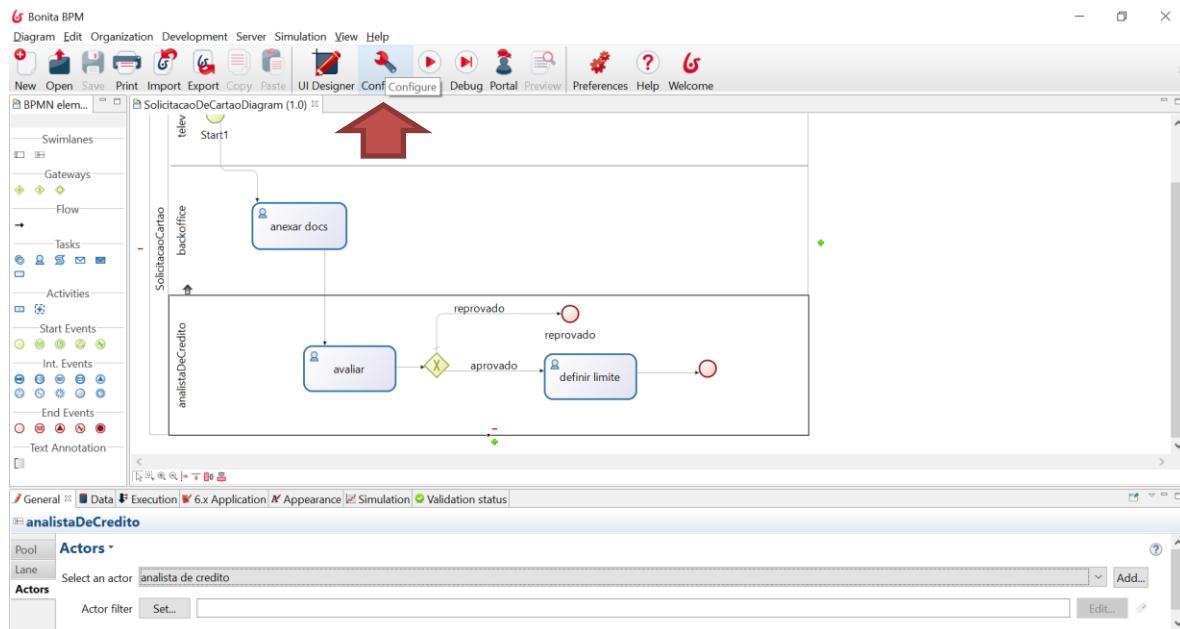
Username

< Back Next > Publish Cancel

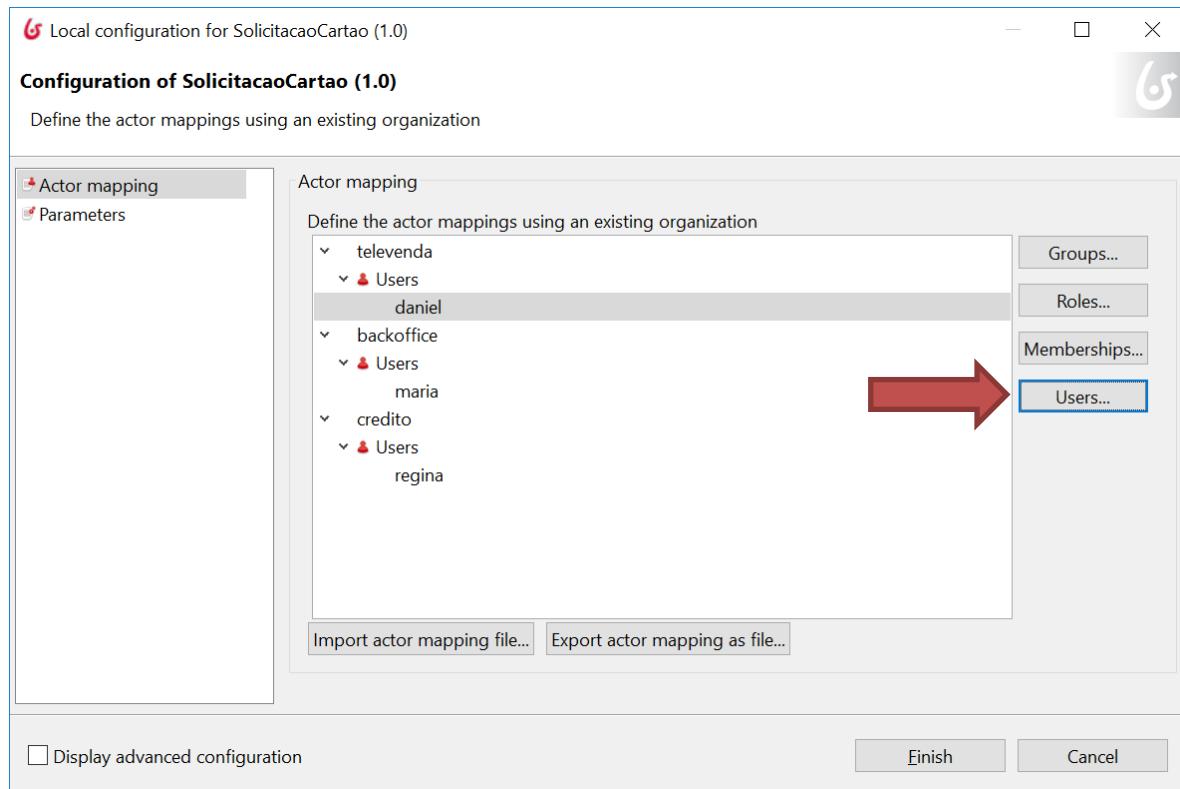
Então clique em Publish

Configurando Projeto

Vamos configurar o projeto, para isso clique em Configure no menu superior:

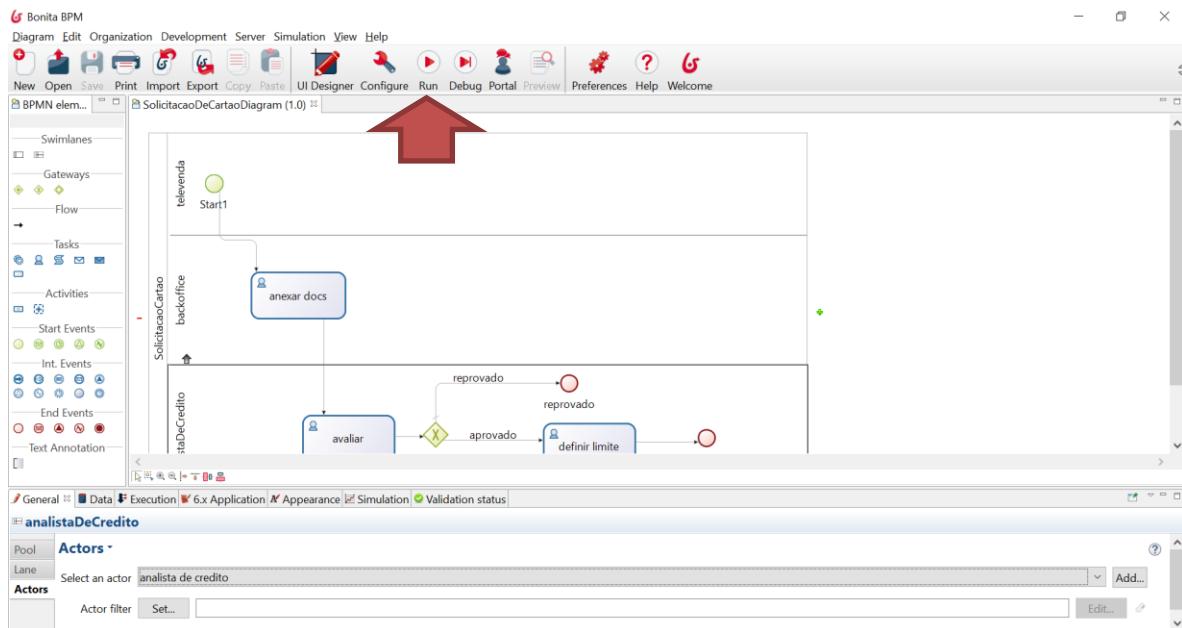


Associe as roles aos grupos criados na organização fiap:



Execução do processo

Clique em Run no menu superior para iniciar uma instância do projeto:

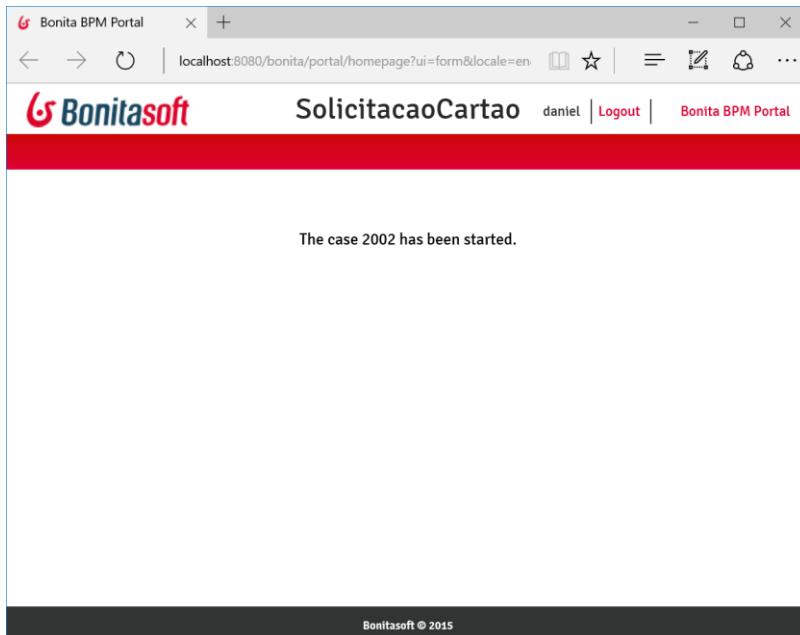


Será aberta uma página web com o formulário:

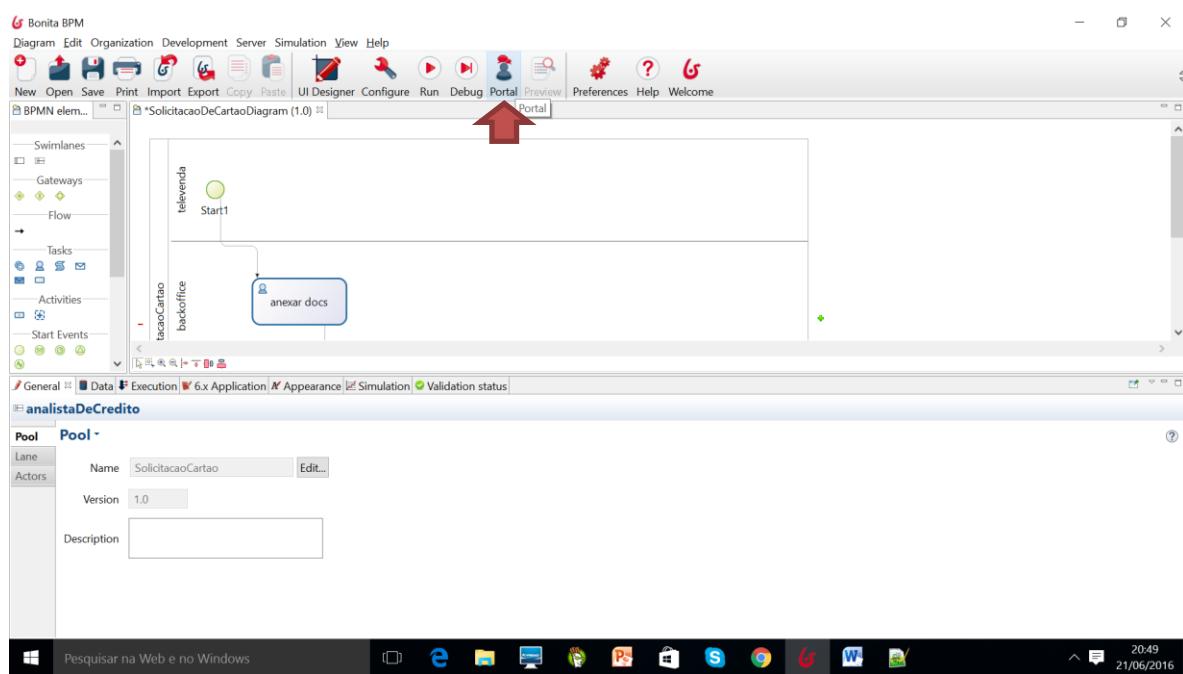
The screenshot shows the Bonita BPM Portal interface, accessible via a browser window at localhost:8080/bonita/portal/homepage?ui=form&locale=en. The page contains a form with various input fields: 'Cpf' (12312312345), 'Telefone' (11777779999), 'Email' (profdbrian.andrade@fiap.com), 'Endereco' (av lins de vasconcelos 1222), 'Renda Mensal' (10000.00), and 'Profissao' (Professor). A red error message 'Decimal number expected for this field.' is displayed next to the 'Renda Mensal' field. At the bottom is a large 'SUBMIT1' button. The footer of the portal includes the text 'Bonitasoft © 2015'.

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Ao clicar em SUBMIT1 é exibido o ID da solicitação:



Vamos checar a inbox, para isso clique em portal na IDE:



Será exibida a tela:

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The screenshot shows the Bonita BPM Portal homepage. At the top, there is a navigation bar with links for 'Tasks', 'Cases', and 'Processes'. Below this is a search bar labeled 'Search...'. On the left, there is a sidebar with categories: 'To do' (selected), 'My tasks', 'Available tasks', and 'Done'. In the main area, there are buttons for 'TAKE' and 'RELEASE'. Below these buttons is a table header with columns for 'Name' and 'Due date'. A message 'No data' is displayed below the table.

Clique em Welcome → logout e entre com usuário maria:

The screenshot shows the Bonita BPM Portal login page. The URL in the address bar is 'localhost:8080/bonita/login.jsp?_l=en&redirectUrl=portal%2Fhomepage'. The page title is 'Welcome to Bonita BPM Portal'. It features the BonitaSoft logo on the left and a 'Login form' on the right with fields for 'username' (containing 'maria') and 'password' (containing '...'). A red 'LOGIN' button is at the bottom right.

A tarefa criada anteriormente é exibida na inbox do backoffice:

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The screenshot shows the Bonita BPM Portal homepage. On the left, there's a sidebar with sections for 'To do', 'My tasks', 'Available tasks', and 'Done'. Below that is a 'Processes' section with one item: 'SolicitacaoCartao 1.c'. The main area has tabs for 'Tasks', 'Cases', and 'Processes'. Under 'Tasks', there's a search bar and two buttons: 'TAKE' and 'RELEASE'. A list of tasks is displayed, with one task highlighted: 'anexar docs' (Case: 2002 - SolicitacaoCartao). To the right, there's a detailed view of this task with fields for 'Name', 'Due date', and a description: 'anexar docs' (2002 - SolicitacaoCartao) due in 52 min. Below this is a 'Comments' section with a text input field and a 'ADD COMMENT' button.

Clique em DO IT:

The screenshot shows a form titled 'Anexar Docs'. It contains several input fields: 'Nome Cliente' (daniel), 'Email' (prof.daniel.andrade@fiap.com), 'Endereco' (av lins de vasconcelos 1222), 'Renda Mensal' (10000), and 'Profissao' (Professor). At the bottom is a 'SUBMIT1' button. The page is part of the Bonita BPM Portal, with the URL localhost:8080/bonita/portal/homepage#?id=40008&_p=performTask&_pf=1.

E então faça o logout e entre com usuário regina, na inbox de crédito irá aparecer a task abaixo:

Automação de processos – BonitaBPM

The screenshot shows the Bonita BPM Portal interface. On the left, there's a sidebar with 'To do', 'My tasks', 'Available tasks', and 'Done'. Under 'Processes', it lists 'SolicitacaoCartao'. The main area has tabs for 'Tasks', 'Cases', and 'Processes'. A search bar is at the top. Below it, a table lists tasks: one task named 'avaliar' is selected, showing details: Case: 2002, Due date: in 59 min, Process: SolicitacaoCartao, Priority: Normal. To the right, a 'Comments' section shows a recent comment from 'System' stating 'The task "anexar docs" is now assigned to maria' (45 sec ago). A 'Type new comment' input field and a '+ ADD COMMENT' button are below.

Selecione a opção aprovado e clique em submit.

This screenshot shows a form for a credit analysis task. It includes fields for Cpf (12312312345), Telefone (11777779999), Email (prof.daniel.andrade@fiap.com), Endereco (av lins de vasconcelos 1222), Renda Mensal (10000), Profissao (Professor), and Aprovado (checkbox checked). There is also a 'Comentario Analise Credito' text area with placeholder text. At the bottom is a 'SUBMITS' button.

Por fim temos a task para definir o limite:

Automação de processos – BonitaBPM

The screenshot shows a web browser window for the Bonita BPM Portal. The URL is `localhost:8080/bonita/portal/homepage#?id=40009&_p=performTask&_pf=1`. The page title is "Definir Limite". The navigation bar includes "Tasks", "Cases", and "Processes". The top right has "Welcome: User" and "Settings". The form fields are:

Nome Cliente	daniel
Renda Mensal	10000
Profissao	Professor
Comentario Analise Credito	
Limite Aprovado	3000

A "SUBMIT1" button is at the bottom.

Clicando em SUBMIT1 finalizamos a execução do processo.

Nesse laboratório modelamos o processo, criamos os formulários, implementamos a condição do gateway, criamos a organização com os papéis e executamos o processo com os usuários configurados.