FLOWx.AI

FIOWX.AI DESIGNER / Managing a process flow

Contents

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The first step of defining your business process in the

The fallback content to display on prerendering
is adding a new process definition for it.

This should include at least one START and END node.

Steps for creating a new process definition

To create a new

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:

1. Open
   The fallback content to display on prerendering
   and go to the **Definitions** tab.
2. Click the **New process** button, using the **breadcrumbs** from the top-right corner.
3. Enter a unique name for your process and click **Create**.
4. You're automatically taken to the **FLOWX Designer** editor where you can start building your process.

In the following section, you will learn how to add a new node to your newly created process.

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FlOWX.AI DESIGNER / Managing a process flow / Adding a new node

Once you create a new

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, you can start configuring it by adding new
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.

You can choose between a series of available node types below. For an overview of what each node represents, see BPMN 2.0 basic concepts:

- start event

- end event

- service task

- user task

- parallel gateway

- exclusive gateway

- message send event

- message receive event

- start milestone

- end milestone

Steps for creating a new node

To create a new node on an existing process:

1. Open
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   and from the **Processes** tab select **Definitions**.

2. Open your **process**.

3. Click the **Edit process** button from the process definition.

4. Drag and drop one **node element**.

5. To connect the node that you just created:

   ○ Click the node, select the **arrow** command

   ○ Click the node that you wish to link to the newly added node

For each new

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, you can set its name, and a set of values (timeout, topic name, key name) and
you can also add various actions to it.

» Node

Now, check the next section to learn how to add an action to a node.

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We use actions to add business decisions to the

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or link the process to custom integrations and
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.

For more information about actions, check the following section:

» Actions

Steps for creating an action

To create an action:

1. Open **FLOWX Designer** and from the **Processes** tab select **Definitions**.

2. Select your **process**.

3. Click the **Edit process** button.

4. Add a new **node**/ edit an existing one.

5. ❗ A few **action parameters** will need to be filled in depending on the selected action type.

6. Add **an action** to the **task node**, for example **sending a Kafka event** to an integration:

- set **Address** (topic) name
- set message content to be sent
    - `{"test" : ${processInstanceId}, "title": "Test title"}`
- a custom header is always set by default to
    - `{"processInstanceId": ${processInstanceId}}`
- if you want some values to be replaced before sending them to Kafka, they should be marked as such in the action params
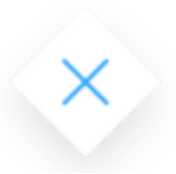
> **ⓘ INFO**
>
> The nodes that support actions are task nodes, user task nodes, and message send nodes.

Was this page helpful?

FlOWX.AI DESIGNER / Managing a process flow / Handling decisions in the flow

To add business decisions in the flow and use them to pick between a flow branch or another, we can use exclusive gateways.

Steps for creating a flow with exclusive branches

To create flow with exclusive branches:

1. Open
   The fallback content to display on prerendering
   and go to the **Definitions** tab.

2. Click on the **New process** button, using the **breadcrumbs** from the top-right corner.

3. Add a **start node** and an **exclusive gateway node**.

4. Add two different **task nodes** and link them after the **exclusive gateway node**.

5. Add a new **exclusive gateway** to merge the two flow branches back into one branch.

6. Add a **new rule** to a node to add a **business decision**, for example:

- select a **scripting language** from the dropdown
- `input.get("application.client.creditScore") >= 700` ← proceed to node for premium credit card
- `input.get("application.client.creditScore") < 700` ← proceed to node for standard credit card

7. Add a **closing exclusive gateway** to continue the flow.

8. Add and **end node**.

For business rules, you need to check certain values from the process and pick an outgoing node in case the condition is met. The gateway node must be connected to the next nodes before configuring the rule.

» Exclusive Gateway Node

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branches

To split the

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into more steps, you just need to use a parallel gateway node type.

Steps for creating a flow with two branches

To create a flow with two branches:

1. Open

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   and go to the **Definitions** tab.

2. Click on the **New process** button, using the **breadcrumbs** from the top-right
   corner.

3. Add a **start node** and a **parallel gateway node**.

4. Add two different **task nodes** and link them after the **parallel gateway node**.

5. Add a **parallel gateway** to merge the two flow branches back into one
   branch.

6. Add an **end node**.

Process Definitions

Search by process definition name

Drafts / In progress

Name	Version	Edited at	Edited by			
AutoTestProcess834506323	1	23 May 2022, 1:41 PM	QA FlowX	▶	✎	⋮
TA_AccessRights	1	23 May 2022, 1:38 PM	QA FlowX	▶	✎	⋮
AutoTestProcess144847353	1	23 May 2022, 12:53 PM	QA FlowX	▶	✎	⋮
AutoTestProcess-10960716...	1	23 May 2022, 12:52 PM	QA FlowX	▶	✎	⋮
AutoTestProcess1277519091	1	23 May 2022, 12:51 PM	QA FlowX	▶	✎	⋮

Published

Name	Version	Published at	Published by			
AutoTestProcess-857687723	1	23 May 2022, 1:40 PM	QA FlowX	▶	✎	⋮
AutoTestProcess95481841	1	23 May 2022, 12:49 PM	QA FlowX	▶	✎	⋮
silviu_update_user	3	23 May 2022, 11:46 AM	silviu grigore	▶	✎	⋮
client_identification_refactor	4	17 Jan 2022, 1:06 PM	silviu grigore	▶	✎	⋮
ccc_mex_proces_principal	27	18 May 2022, 2:35 PM	serban chiricescu	▶	✎	⋮

» Parallel Gateway

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FlOWX.AI DESIGNER / Managing a process flow / Creating a user

interface

Creating a stepper structure

To create a stepper structure:

1. Go to

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   and go to the **Definitions** tab.

2. Click on the **New process** button, using the **breadcrumbs** from the top-right corner.

3. Add a **start node**.

4. Add a new **milestone** to describe all the user tasks.

5. Add a **user task** that will represent the first card of our step.

6. Add an **end milestone** for both the step and the stepper.

7. End your process with an **end node**.

Configuring the UI

- All the UI elements are configured via the
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- Starting from our basic process, we need to set the start of the stepper
  template config

- It is enough to open the drag and drop menu and add a Stepper template
  config for now

- For the first step, it will be useful to add also a label

- Clear the cache to test what we have until now

Testing the flow that we have

1. From the **process definition**, click the **Start process** button.

2. We will not pass any data to this process so an empty object `{}`.

3. Click **Start Process** and you will see the first step.

Adding a card with one input

1. Go to your **user task** (this will represent the **first card** of your step).

2. Add a ┌──────┐ **CARD** └──────┘ (this is the UI card element).

3. Add a **Form** to it (Form elements group inputs together).

4. Add an **input** into the form:
   - Configure the **key** - you can use the key to retrieve the data form saved on that element
   - Configure a **label**

Testing our first input

1. **Start** one more time **the process** that you just configured.

2. The **input** is displayed.

3. Test the **input**.

Adding second input and a submit action

1. Go to your **user task** node and add a new input via **Node UI designer**.

2. Now go back to the process and add a new **action rule**:
   - first we need to configure the action - the action is called when the button is pressed - the action should be **Manual** (not automatic because it is triggered by a user)
   - we need to keep in mind the name of the action - `saveDataFirstStep`

3. Go back to the Node UI designer and add a button (we need to link the **button** to the **action** based on the name).

Was this page helpful?

FIOWX.AI DESIGNER / Managing a process flow / Moving a token backwards in a process

> (!) **INFO**
>
> **What is it?** Back in process is a functionality that allows you to go back in a business process redo a series of previous
>
> The fallback content to display on prerendering in the process.
>
> **Why is it useful?** Brings a whole new level of flexibility in using a business flow or journey, allowing the user to go back a step without losing all the data inputted so far.

In most cases, the

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instance will just need to advance forward in the process as the actions on the process are completed.

> » Token

But there might be cases when the token will need to be moved backward in order to redo a series of previous actions in the process.

We will call this behavior **resetting the token**.

The token can only be reset to certain actions on certain process nodes. These actions will be marked accordingly with a flag `allowTokenReset`. When such an action is triggered from the application, the current process token will be marked as aborted and a new one will be created and placed on the node that contains the action that was executed. If any sub-processes were started between the two token positions, they will also be aborted when the token is reset.

The newly created token will copy from the initial token all the information regarding the actions that were performed before the reset point.

There are a few configuration options available in order to decide which of the data to keep when resetting the token:

- `restartFromSnapshot` - if set to true, the process parameter values will be reset to the values they had before the first execution of that action
- `keysForRestart` - an array of process parameter values keys to be copied from the initial execution of that process part

Allow BACK on this action?

Back in steps

When reset from this action, recreate state?

Copy from current state this objects

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FIOWX.AI DESIGNER / Managing a process flow / Exporting / importing a process definition

To copy

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and move them between different environments, you can use the export/import
feature.

Export a process definition

You can export a process definition as a JSON file directly from the process
definitions list in the

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:

Import a process definition

You can then import the process definition from the FLOWX Designer. This will add a new definition to your database and set it as a draft. You can then check the imported definition and publish the process to be able to use it from the

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.

In case a definition with the same name and version already exists in the environment, the version of the imported process will be incremented.

> ⚠ **CAUTION**
>
> In case the process definition was exported using an incompatible FLOWX Designer version, you will receive an error and not be able to import it. It will first need to be adjusted to match the format needed by your current FLOWX Designer version.

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FlOWX.AI DESIGNER / Managing a process flow / Process definition states & versioning

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in

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can be edited with ease. To keep track of updates and changes, each definition is assigned a version number and state.

A Process Definition is unique and can be identified by its name and version number. It can have one of the following states:
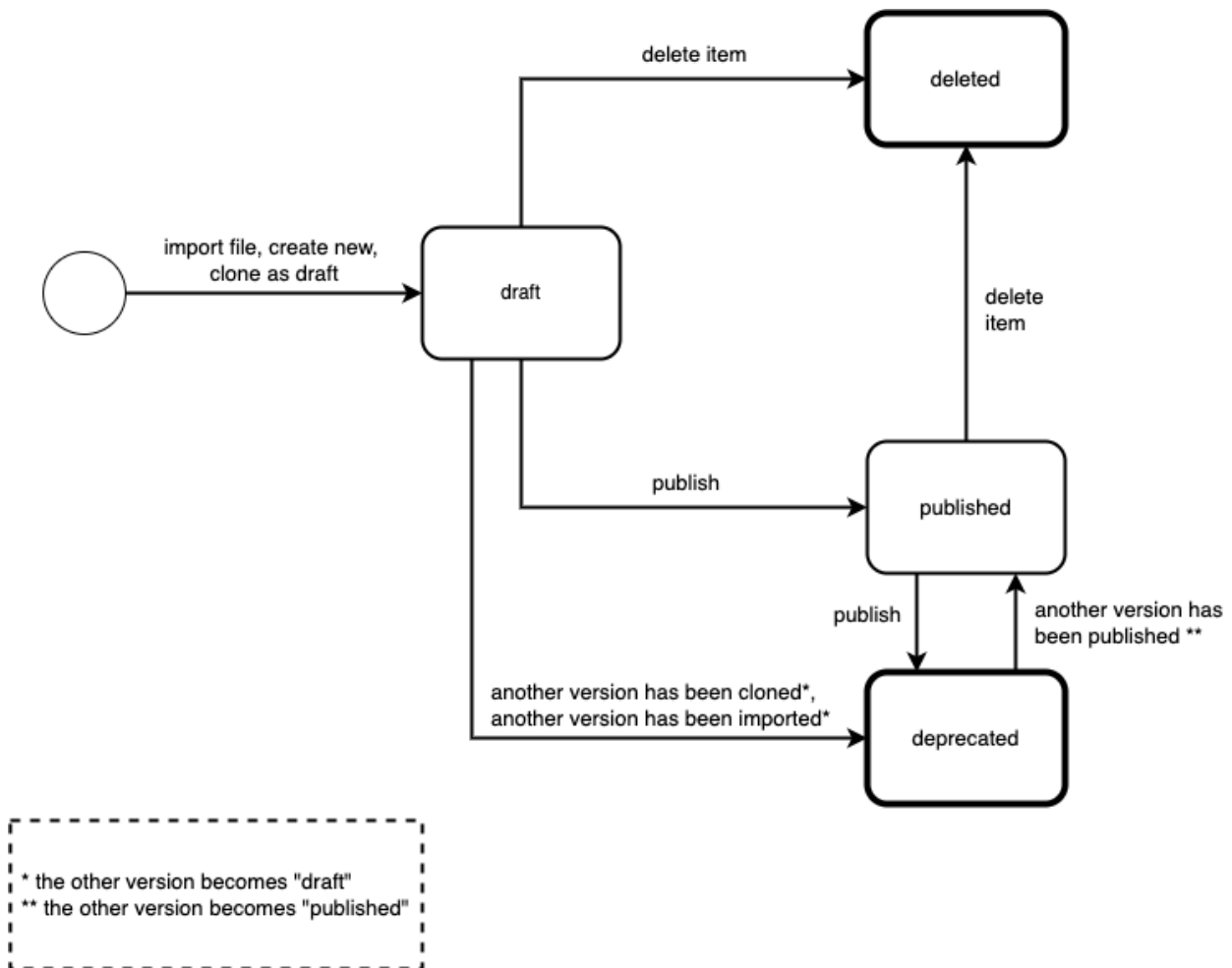
- **draft** - in progress and can't be used to create
  The fallback content to display on prerendering
  , can only be started in test mode
- **published** - only one version can be published at a time, and it will be used to instantiate new processes; published versions can be edited
- **deleted** - not visible or usable in the platform
- **deprecated** - old versions

At any time, there can only be one draft and one published version for a specific process definition. A new

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can be created by adding it in FLOWX.AI Designer, importing an existing one, or cloning an existing definition. A newly created definition will be in the draft state.

Deleting a draft or published version will automatically delete all versions of that definition. When a new version is set to published, the previous published version becomes deprecated. A published version cannot be reset to draft.

When a new version is obtained through cloning or importing, the old versions become deprecated. Importing or cloning a definition increments the maximum version number. If importing/cloning for the first time in a new environment, the definition will be saved with the version number in the imported content. If no version number is present, it will be automatically set to 1.

Testing draft versions

A separate REST endpoint is available for starting process instances from draft process definitions:

> ▶ **GET** **ENGINE_URL/api/internal/process/processDefinitionId/start**

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