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**FLOW<sup>X</sup>.AI**

FLOWX.AI DESIGNER

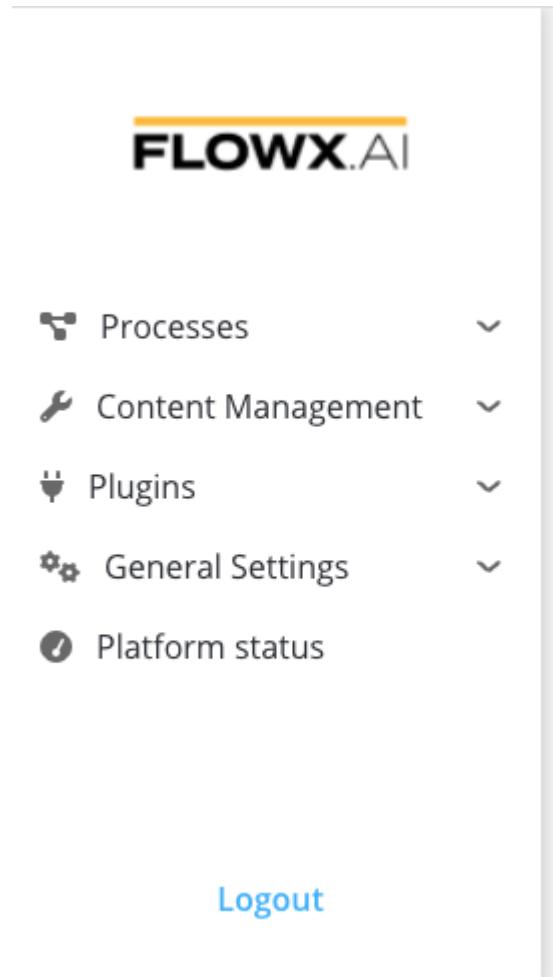
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## FLOWX.AI DESIGNER / What is the FLOWX Designer?

FLOWX Designer is the FLOWX.AI no-code visual development environment. It allows users to create web and mobile applications without having to know how to code.



With the FLOWX Designer, you can:

- Develop  
The fallback content to display on prerendering  
based on **BPMN 2.0**
- Configure interfaces for the processes for both generated and custom screens
- Define  
The fallback content to display on prerendering  
and validations via **DMN** files or via **MVEL**, or using other supported scripting  
languages
- Create integration connectors in a visual manner

- Create  
The fallback content to display on prerendering  
for your applications
- Adding new capabilities by using [plugins](#)
- Manage users access

This section will go through the steps to set up the

The fallback content to display on prerendering  
and how to use it.

» [Overview](#)

» [Managing a process flow](#)

» [Designer setup guide](#)

Was this page helpful?

## FLOWX.AI DESIGNER / Overview

👉 Let's go through the main options available in the

The fallback content to display on prerendering

▶ Processes

▶ Content Management

▶ Plugins

▶ General Settings

▶ Platform status

The screenshot shows the FLOWX.AI Designer application interface. At the top, there is a yellow horizontal bar followed by the FLOWX.AI logo. Below the logo is a sidebar containing five items, each with an icon and a dropdown arrow:

- Processes
- Content Management
- Plugins
- General Settings
- Platform status

### INFO

Depending on your access rights, some tabs might not be visible. For more information, check Configuring access rights for Admin section.

## Managing process definitions

A

The fallback content to display on prerendering is uniquely identified by its name and version number.

The screenshot shows the FLOWX.AI Designer application. On the left, there is a sidebar with navigation links: Processes (Definitions, Active process), Content Management (Enumerations, Substitution tags, Content models, Languages, Source systems), and Plugins (Task Manager, All tasks, Hooks, Stages). The main area is titled "Process Definitions" and contains two tables: "Drafts / In progress" and "Published".

**Drafts / In progress:**

Name	Version	Edited at	Edited by	Actions
Test Process	36	26 May 2022, 11:01 AM	QA FlowX	▶ ⚒ ⋮
Test Process 1	1	25 May 2022, 9:13 AM	QA FlowX	▶ ⚒ ⋮

**Published:**

Name	Version	Published at	Published by	Actions
Happy Process	1	24 May 2022, 2:59 PM	QA FlowX	▶ ⚒ ⋮
Demo Process	1	23 May 2022, 8:53 PM	QA FlowX	▶ ⚒ ⋮

» Process definition

» Managing a process flow

## Viewing active process instances

The complete list of active

The fallback content to display on prerendering  
is visible from the FLOWX Designer. They can be filtered by  
The fallback content to display on prerendering  
names and searched by their unique ID. You can also view the current process  
instance status and data.

The screenshot shows the FLOWX.AI Designer application. On the left is a sidebar with a tree view of available tabs: Processes, Definitions, Active process (which is selected and highlighted in blue), Content Management, Plugins, General Settings, and Platform status. The main content area is titled "Active processes". It contains a table with the following data:

Process uid	Definition name	Status	Current Node Name	Start date	Action
f6c051ab-f066-4e1a-b98e-5a3bf3b887b5	Client Identification	FINISHED	End	18 May 2022, 5:56 PM	⌚
9278863b-6f47-42aa-9e8e-a8b3d059df10	Test Process	FINISHED	End	18 May 2022, 5:53 PM	⌚
3d16a65d-7224-4ffa-9f88-17ea3c6fbf50	Test Process 1	FINISHED	End	18 May 2022, 5:53 PM	⌚
537c7e51-bc11-4fde-be24-c3e33e686749	Test Process 2	FINISHED	End	18 May 2022, 5:51 PM	⌚
a8a5ad8d-277e-46d2-b45e-80dc0728460e	Test Process 3	FINISHED	End	18 May 2022, 5:46 PM	⌚
fa273456-bd03-48d1-98fc-710aff4c8794	Test Process 4	FINISHED	End	18 May 2022, 5:44 PM	⌚

### » Process instance

## Managing CMS

Using the content management feature you can perform multiple actions that enable manipulation of the content and simplification of it. You need first to deploy the CMS service in your infrastructure, so you can start defining and using the custom content types described in the **Content Management** tab above.

The screenshot shows the FLOWX.AI Designer interface. On the left is a sidebar with icons for Processes, Content Management, Plugins, General Settings, and Platform status, with a Logout link at the bottom. The main area is titled "Process Definitions" with a search bar and a more options button. It displays two sections: "Drafts / In progress" and "Published".

**Drafts / In progress:**

Name	Version	Edited at	Edited by	Actions
1		25 May 2022, 4:40 PM	QA FlowX	

**Published:**

Name	Version	Published at	Published by	Actions
4		26 May 2022, 12:49 PM	John Doe	

» Headless CMS

» CMS Setup Guide

## Managing tasks

### The Task Manager

The fallback content to display on prerendering has the scope to show a process that you defined in Designer, offering a more business-oriented view. It also offers interactions at the assignment level.

The screenshot shows the FLOWX.AI Designer interface. On the left is a sidebar with navigation links: Processes, Content Management (with sub-links: Enumerations, Substitution tags, Content models), Languages, Source systems, Plugins (with sub-links: Task Manager, All tasks, Hooks, Stages, Notification templates, Document templates), General Settings, and Platform status. The main area is titled 'Activities' and contains a table with columns: Title, Stage, Assignee, Status, Priority, and Last updated. There are 9 rows in the table, each representing a task named Task 1 through Task 9. Task 1 has a status of 'STARTED'. Tasks 2 through 8 have a status of 'EXPIRED', while Task 9 has a status of 'FAILED'. The last column shows dates ranging from 25.5.2022 to 15.12.2021.

Title	Stage	Assignee	Status	Priority	Last updated
Task 1	Onboarding	silviu@flowx.ai	STARTED	3	25.5.2022, 12:45
Task 2	Onboarding	front@flowx.ai	EXPIRED	3	8.3.2022, 16:21
Task 3	Onboarding	silviu@flowx.ai	EXPIRED	3	27.1.2022, 17:50
Task 4	Onboarding	silviu@flowx.ai	FAILED	3	15.12.2021, 2:40
Task 5	Onboarding	silviu@flowx.ai	FAILED	3	15.12.2021, 2:40
Task 6	Onboarding	silviu@flowx.ai	FAILED	3	15.12.2021, 2:40
Task 7	Onboarding	silviu@flowx.ai	FAILED	3	15.12.2021, 2:40
Task 8	Onboarding	silviu@flowx.ai	FAILED	3	15.12.2021, 2:40
Task 9	Onboarding	silviu@flowx.ai	FAILED	3	15.12.2021, 2:40

» Task Management

## Managing notification templates

The notification templates plugin can be viewed, edited, and activated/inactivated from the

The fallback content to display on prerendering

The screenshot shows the FLOWX.AI Designer interface. On the left is a sidebar with navigation links: Processes (Definitions, Active process), Content Management (Enumerations, Substitution tags, Content models, Languages, Source systems), Plugins (Task Manager, All tasks, Hooks, Stages), Notification templates (selected), Document templates, General Settings (Generic Parameters), and Platform status. At the bottom of the sidebar are Logout and Test buttons. The main area is titled "Notifications Template - ExampleTemplate". It has tabs for Body and Data model, with Body selected. Under Body, there are fields for Type (MAIL), Language (Romanian (Romania)-ro-RO), and Romanian (Romania)-ro-RO subject (Contract [\${firstInput}]). A rich text editor toolbar is above the preview area. The preview area shows an email template with a logo, a greeting, a message with two input placeholders (#firstInput, #secondInput), and a note about attachments. At the bottom right are Save and Publish buttons.

» Notifications

## Managing document templates

One of the main features of the **document management plugin** is the ability to generate new documents based on custom templates and prefilled with data related to the current process instance.

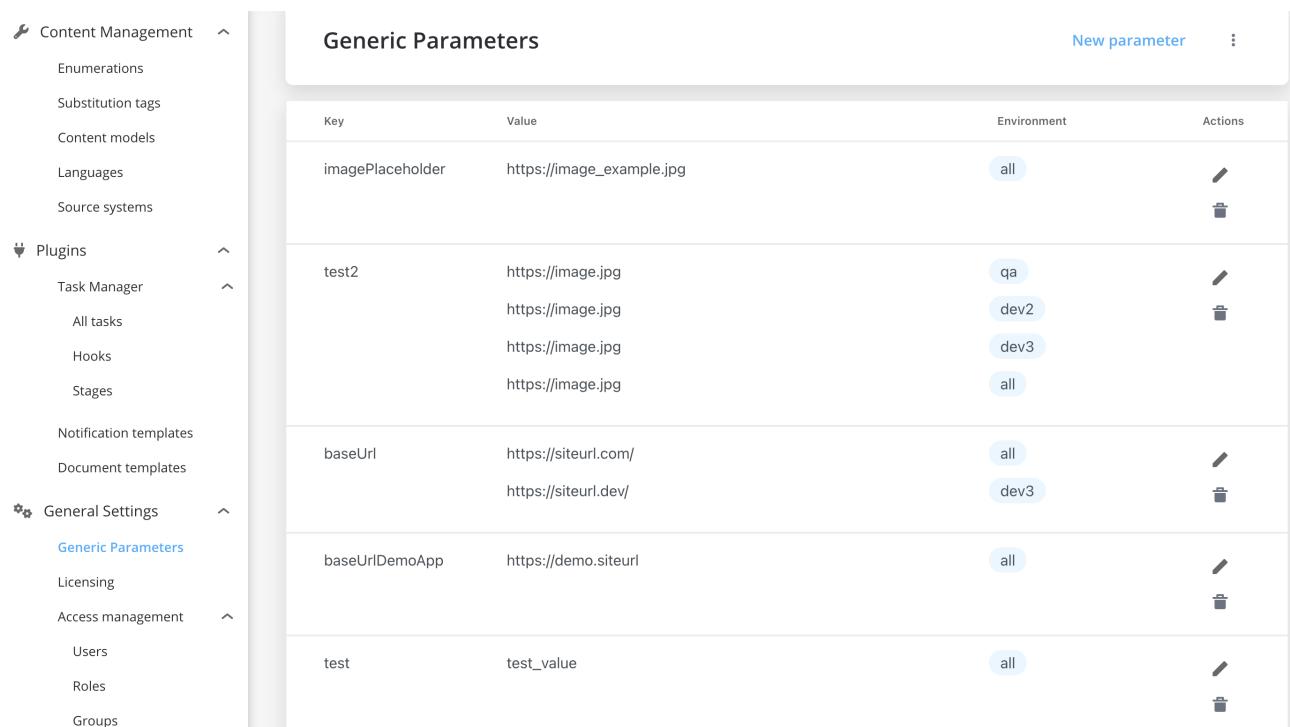
The screenshot shows the FLOWX.AI Designer application. On the left is a sidebar with navigation links: Processes (Definitions, Active process), Content Management (Enumerations, Substitution tags, Content models, Languages, Source systems), Plugins (Task Manager, Hooks, Stages, Notification templates), Document templates (selected), General Settings (Generic Parameters), and Platform status. At the bottom of the sidebar is a Logout link. The main area is titled "Documents Templates - ExampleTemplate". It has tabs for "Body" (selected) and "Data model". The "Body" tab shows a rich text editor toolbar with various icons for text, tables, and images. Below the toolbar is a placeholder text: "Template generated for the FLOWX.AI Academy by". In the body content, there are two input fields with dashed borders: "#firstInput" and "#secondInput". A large block of placeholder text follows: "Lorem ipsum dolor sit amet, consectetur adipiscing elit. Quisque sollicitudin leo in sem tempus, ut aliquet eros porttitor. Nullam condimentum dapibus massa in maximus. Vivamus nulla est, posuere eget metus quis, iaculis euismod magna. Integer non nisi non ipsum porttitor pulvinar. Fusce commodo varius felis at finibus. Vestibulum pulvinar mauris sit amet nisl vestibulum, vitae facilisis sem convallis. In hac habitasse platea dictumst. Nulla sagittis nibh mi, venenatis". At the bottom of the editor are buttons for "Test", "Save" (highlighted in blue), and "Publish".

» Document management

## Managing generic parameters

## Through the

The fallback content to display on prerendering, you can edit generic parameters, and import or export them. You can set generic parameters and assign the environment(s) where they should apply.



The screenshot shows the FLOWX Designer interface with the 'Generic Parameters' section highlighted. On the left, there's a sidebar with categories like Content Management, Plugins, and General Settings. The 'General Settings' section is expanded, showing 'Generic Parameters' selected. The main area displays a table of generic parameters with columns for Key, Value, Environment, and Actions. The table contains the following data:

Key	Value	Environment	Actions	
imagePlaceholder	https://image_example.jpg	all		
test2	https://image.jpg https://image.jpg https://image.jpg https://image.jpg	qa dev2 dev3 all		
baseUrl	https://siteurl.com/ https://siteurl.dev/	all dev3		
baseUrlDemoApp	https://demo.siteurl	all		
test	test_value	all		

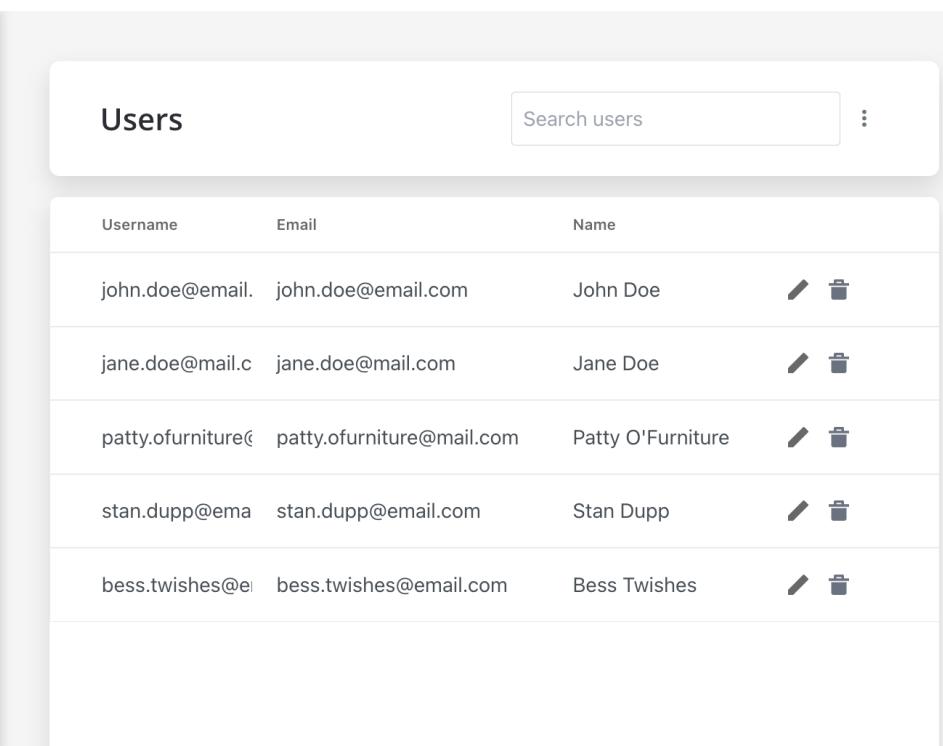
### ⚠ CAUTION

The maximum length of an input value is 255 characters.

## Managing users access

Access Management is used to administrate users, roles and groups, directly in FLOWX Designer. Access Management helps you to access the identity management solution (keycloak/RH-SSO) through its API, extracting all the

necessary details. Access Management is based on user roles that need to be configured in the identity management solution.



The screenshot shows the FLOWX.AI Designer application interface. On the left is a sidebar with the following navigation items:

- Processes
- Content Management
- Plugins
- General Settings
  - Generic Parameters
  - Licensing
- Access management
  - Users** (selected)
  - Roles
  - Groups
- Platform status

The main content area is titled "Users" and contains a table with the following data:

Username	Email	Name	Actions
john.doe@email.com	john.doe@email.com	John Doe	
jane.doe@mail.com	jane.doe@mail.com	Jane Doe	
patty.ofurniture@mail.com	patty.ofurniture@mail.com	Patty O'Furniture	
stan.dupp@email.com	stan.dupp@email.com	Stan Dupp	
bess.twishes@email.com	bess.twishes@email.com	Bess Twishes	

» [Configuring access rights for admin](#)

## Managing integrations

Integration management enables you to keep track of each integration and its correspondent component and different scenarios used: creating an OTP, document generation, notifications, etc.

The screenshot shows the FlowX.AI Designer application. On the left, there is a sidebar with the following navigation items:

- Enumerations
- Substitution tags
- Content models
- Languages
- Source systems
- Plugins (selected)
- General Settings
- Generic Parameters
- Integration management (selected)
- Licensing
- Access management

On the right, the main area is titled "Integrations". It contains a table with the following data:

	Name	Identifier	System name	Actions
>	Integration 1	Intgr	01	
>	Document Pl...	documentPlu...	FlowX	
>	Notification Pl...	notificationPl...	FlowX	
>	Integration Test	test	System	
>	test_integrati...	integrationtest	Flowx	

## Checking platform status

You can quickly check the health status of all the

The fallback content to display on prerendering  
and all of your custom connectors.

Component name	Status	Installed version	Suggested version
Component 1	UP	0.3.40	0.3.40
Component 2	UP	0.2.23	0.2.23
Component 3	UP	1.0.37	1.0.37

Component name	Status	Installed version
Custom Component	UP	0.1.22
Custom component 1	DOWN	-

Check the next section to learn how to create and manage a process from scratch:

» [Managing a process flow](#)

Was this page helpful?

# FLOWX.AI DESIGNER / Managing a process flow / Creating a new process definition

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

The fallback content to display on prerendering

:

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.

The screenshot shows the FLOWX.AI Designer application. On the left, there is a sidebar with the following navigation items:

- Processes
  - Definitions
  - Active process
- Content Management
  - Enumerations
  - Substitution tags
  - Content models
  - Languages
  - Source systems
- Plugins
  - Task Manager
  - All tasks
  - Hooks
  - Stages
- Notification templates
- Document templates
- General Settings
  - Generic Parameters
- Platform status

The main content area is titled "Process Definitions". It has two sections: "Drafts / In progress" and "Published".

**Drafts / In progress:**

Name	Version	Edited at	Edited by	Actions
demo_3	1	19 May 2022, 4:03 PM	Dragos Caravasile	
tibi_test_gap	1	19 May 2022, 3:59 PM	QA FlowX	
tibi_testMandatoryKey	1	19 May 2022, 12:19 PM	QA FlowX	
ccc_mex_proces_principal_1652945...	1	19 May 2022, 10:32 AM	serban chiricescu	
ccc_mex_proces_principal_1652878...	1	18 May 2022, 3:52 PM	serban chiricescu	

**Published:**

Name	Version	Published at	Published by	Actions
ccc_mex_proces_principal	27	18 May 2022, 2:35 PM	serban chiricescu	
testVlad6	1	09 May 2022, 5:06 PM	QA FlowX	
Vlad_Process	1	02 May 2022, 12:20 PM	QA FlowX	
silviu_update_user	1	08 Apr 2022, 10:40 AM	silviu grigore	
silviu_client_identification	1	08 Apr 2022, 9:43 AM	silviu grigore	

At the bottom left of the main area, there is a small watermark: "MADE WITH GIFOX.GIF".

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

Was this page helpful?

# FLOWX.AI DESIGNER / Managing a process flow / Adding a new node

Once you create a new

The fallback content to display on prerendering

, you can start configuring it by adding new

The fallback content to display on prerendering

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

The fallback content to display on prerendering

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

The screenshot shows the FLOWX.AI Designer application. On the left is a sidebar with navigation links: Processes, Definitions, Active process (which is selected), Content Management, Plugins, General Settings, and Platform status. At the bottom of the sidebar are Logout and Help links. The main area is titled 'Active processes' and contains a table with the following data:

Process uid	Definition name	Status	Current Node Name	Start date	Action
c65e56a9-f6bf-4da8-84de-6b333fa0ed41	Libra	<span>FINISHED</span>	b7acc0ef-f366-4150-bacd-9eea43b93ff4	20 May 2022, 5:26 PM	<span>⋮</span>
6b42bdcf-35d8-45e6-9d72-d617f3478480	Libra	<span>FINISHED</span>	b7acc0ef-f366-4150-bacd-9eea43b93ff4	20 May 2022, 5:25 PM	<span>⋮</span>
8e33d734-8cb0-4c88-bbdb-4ee4072d628d	Libra	<span>FINISHED</span>	b7acc0ef-f366-4150-bacd-9eea43b93ff4	20 May 2022, 5:20 PM	<span>⋮</span>
cb085d27-d606-4477-93d3-2732dd2699a1	silviu_main_process	<span>FAILED</span>	step_1	20 May 2022, 4:06 PM	<span>⋮</span>
4b4e27b5-6a6d-4f15-aff2-7cc46e389cbe	silviu_main_process	<span>FAILED</span>	step_1	20 May 2022, 4:05 PM	<span>⋮</span>
c449bee6-063b-413b-862c-4003a1d9328	silviu_main_process	<span>FAILED</span>	step_1	20 May 2022, 4:04 PM	<span>⋮</span>

For each new

The fallback content to display on prerendering

, 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.

[Was this page helpful?](#)

# FLOWX.AI DESIGNER / Managing a process flow / Adding an action to a node

We use actions to add business decisions to the

The fallback content to display on prerendering

or link the process to custom integrations and

The fallback content to display on prerendering

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

The screenshot shows the FLOWX.AI Designer application. On the left is a sidebar with navigation links: Processes (Definitions, Active process), Content Management (Enumerations, Substitution tags, Content models, Languages, Source systems), Plugins (Task Manager, All tasks, Hooks, Stages), General Settings (Generic Parameters), Platform status, and Logout. The main area is titled "Process Definitions" and contains two tables: "Drafts / In progress" and "Published".

**Drafts / In progress**

Name	Version	Edited at	Edited by	Actions
demo_5	1	19 May 2022, 5:16 PM	Dragos Caravasile	
deleteActionsParentBug	1	19 May 2022, 4:31 PM	Ciprian Forcos	
tibi_test_gap	1	19 May 2022, 3:59 PM	QA FlowX	
tibi_testMandatoryKey	1	19 May 2022, 12:19 PM	QA FlowX	
ccc_mex_proces_principal...	1	19 May 2022, 10:32 AM	serban chiricescu	

**Published**

Name	Version	Published at	Published by	Actions
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	
testVlad6	1	09 May 2022, 5:06 PM	QA FlowX	
Vlad_Process	1	02 May 2022, 12:20 PM	QA FlowX	
silviu_update_user	1	08 Apr 2022, 10:40 AM	silviu grigore	

## !(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.

The screenshot shows the FLOWX.AI Designer application. On the left is a sidebar with navigation links: Processes (Definitions, Active process), Content Management (Enumerations, Substitution tags, Content models, Languages, Source systems), Plugins (Task Manager, All tasks, Hooks, Stages), General Settings (Generic Parameters), and Platform status. At the bottom of the sidebar is a Logout link. The main area is titled "Process Definitions" and contains two tables: "Drafts / In progress" and "Published".

**Drafts / In progress**

Name	Version	Edited at	Edited by	Actions
gateway_decisions_docs	1	23 May 2022, 11:11 AM	Dragos Caravasile	
demo_5	1	19 May 2022, 5:16 PM	Dragos Caravasile	
deleteActionsParentBug	1	19 May 2022, 4:31 PM	Ciprian Forcos	
tibi_test_gap	1	19 May 2022, 3:59 PM	QA FlowX	
tibi_testMandatoryKey	1	19 May 2022, 12:19 PM	QA FlowX	

**Published**

Name	Version	Published at	Published by	Actions
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	
testVlad6	1	09 May 2022, 5:06 PM	QA FlowX	
Vlad_Process	1	02 May 2022, 12:20 PM	QA FlowX	
silviu_update_user	1	08 Apr 2022, 10:40 AM	silviu grigore	

» Exclusive Gateway Node

Was this page helpful?

# FLOWX.AI DESIGNER / Managing a process flow / Adding more flow

# branches

To split the

The fallback content to display on prerendering 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

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 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**.

The screenshot shows the FLOWX.AI Designer application. On the left is a sidebar with the following navigation:

- Processes**
  - Definitions** (selected)
  - Active process
- Content Management**
  - Enumerations
  - Substitution tags
  - Content models
  - Languages
  - Source systems
- Plugins**
  - Task Manager
  - All tasks
  - Hooks
  - Stages
  - Notification templates
  - Document templates
- General Settings**
  - Generic Parameters
- Platform status
- Logout

The main content area is titled "Process Definitions". It contains two tables:

### Drafts / In progress

Name	Version	Edited at	Edited by	Actions
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	Actions
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

Was this page helpful?

# FLOWX.AI DESIGNER / Managing a process flow / Creating a user

# interface

## Creating a stepper structure

To create a stepper structure:

1. Go to

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**.
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**.

The screenshot shows the FLOWX.AI Designer application. On the left is a sidebar with the following navigation:

- Processes
  - Definitions (selected)
  - Active process
- Content Management
  - Enumerations
  - Substitution tags
  - Content models
  - Languages
  - Source systems
- Plugins
  - Task Manager
  - All tasks
  - Hooks
  - Stages
  - Notification templates
  - Document templates
- General Settings
  - Generic Parameters

The main area is titled "Process Definitions". It has two sections: "Drafts / In progress" and "Published".

**Drafts / In progress:**

Name	Version	Edited at	Edited by	Actions
Stepper Structure	1	24 May 2022, 11:41 AM	Dragos Caravasile	
TA_ActionProcess_v1	23	24 May 2022, 8:59 AM	QA FlowX	
Andratestgateway	1	23 May 2022, 11:32 AM	andra popazu	

**Published:**

Name	Version	Published at	Published by	Actions
AutoTestProcess-147...	1	23 May 2022, 8:53 PM	QA FlowX	
AutoTestProcess145...	1	23 May 2022, 8:49 PM	QA FlowX	
AutoTestProcess212...	1	23 May 2022, 3:10 PM	QA FlowX	

## Configuring the UI

- All the UI elements are configured via the `uiConfig`. The fallback content to display on prerendering
- 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

The screenshot shows the FLOWX.AI Designer application. On the left is a sidebar with the following navigation items:

- Processes
  - Definitions
  - Active process
- Content Management
  - Enumerations
  - Substitution tags
  - Content models
  - Languages
  - Source systems
- Plugins
  - Task Manager
  - All tasks
  - Hooks
  - Stages
  - Notification templates
  - Document templates
- General Settings
  - Generic Parameters
  - Licensing
  - Access management

The main content area is titled "Process Definitions". It has a search bar at the top right and two sections: "Drafts / In progress" and "Published".

**Drafts / In progress:**

Name	Version	Edited at	Edited by	Actions
stepper structure	1	24 May 2022, 12:13 PM	Dragos Caravasile	
swimlane_drag_docs	1	24 May 2022, 10:24 AM	Dragos Caravasile	
AutoTestProcess-801144746	1	23 May 2022, 9:00 PM	QA FlowX	
AutoTestProcess1667954254	1	23 May 2022, 8:58 PM	QA FlowX	

**Published:**

Name	Version	Published at	Published by	Actions
AutoTestProcess273667156	1	24 May 2022, 12:07 PM	QA FlowX	
AutoTestProcess-116652463	1	23 May 2022, 8:59 PM	QA FlowX	
AutoTestProcess-1433671545	1	23 May 2022, 8:56 PM	QA FlowX	
AutoTestProcess-1599143931	1	23 May 2022, 7:24 PM	QA FlowX	

## 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.

The screenshot shows the FLOWX.AI Designer application. On the left is a sidebar with navigation links: Processes (Definitions, Active process), Content Management (Enumerations, Substitution tags, Content models, Languages, Source systems), Plugins (Task Manager, All tasks, Hooks, Stages), and Notification templates. The main area is titled "Process Definitions" and contains two sections: "Drafts / In progress" and "Published".

**Drafts / In progress:**

Name	Version	Edited at	Edited by	Actions
Test Process	5	26 May 2022, 4:49 PM	John Doe	▶ ⚒ ⋮
Test Process 1	1	25 May 2022, 4:40 PM	QA FlowX	▶ ⚒ ⋮

**Published:**

Name	Version	Published at	Published by	Actions
Test Process 3	4	26 May 2022, 12:49 PM	Jane Doe	▶ ⚒ ⋮
stepper structure	1	24 May 2022, 12:13 PM	John Doe	▶ ⚒ ⋮

## 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:
  - o Configure the **key** - you can use the key to retrieve the data form saved on that element
  - o Configure a **label**

The screenshot shows the FLOWX.AI Designer application. On the left is a sidebar with the FLOWX.AI logo at the top. Below it are several sections: 'Processes' (with 'Definitions' selected), 'Content Management' (with 'Enumerations', 'Substitution tags', 'Content models', 'Languages', and 'Source systems' listed), 'Plugins' (with 'Task Manager' listed), and 'All tasks'. The main area is titled 'Process Definitions' and contains two tables. The first table, 'Drafts / In progress', has one row: 'AutoTestProc...' (Version 1, Edited at 24 May 2022, 12:26 PM, Edited by QA FlowX). The second table, 'Published', also has one row: 'stepper struct...' (Version 1, Published at 24 May 2022, 12:13 PM, Published by Dragos Caravasile). A search bar and a more options button are at the top right of the main area.

Name	Version	Edited at	Edited by
AutoTestProc...	1	24 May 2022, 12:26 PM	QA FlowX

Name	Version	Published at	Published by
stepper struct...	1	24 May 2022, 12:13 PM	Dragos Caravasile

## Testing our first input

1. Start one more time the process that you just configured.
2. The input is displayed.
3. Test the input.

The screenshot shows the FLOWX.AI Designer application. On the left, there is a sidebar with the following navigation items:

- Processes
  - Definitions (highlighted in blue)
  - Active process
- Content Management
  - Enumerations
  - Substitution tags
  - Content models
  - Languages
  - Source systems
- Plugins
  - Task Manager
    - All tasks
  - Hooks
  - Stages

The main content area is titled "Process Definitions". It contains two sections: "Drafts / In progress" and "Published".

**Drafts / In progress:**

Name	Version	Edited at	Edited by	Actions
AutoTestProcess1667954254	1	23 May 2022, 8:58 PM	QA FlowX	▶ ⚒ ⋮
AutoTestProcess-1295228711	1	23 May 2022, 8:57 PM	QA FlowX	▶ ⚒ ⋮

**Published:**

Name	Version	Published at	Published by	Actions
stepper structure	1	24 May 2022, 12:13 PM	Dragos Caravasile	▶ ⚒ ⋮
AutoTestProcess273667156	1	24 May 2022, 12:07 PM	QA FlowX	▶ ⚒ ⋮

## 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).

The screenshot shows the FLOWX.AI Designer application. On the left is a sidebar with the following navigation:

- Processes
  - Definitions**
  - Active process
- Content Management
  - Enumerations
  - Substitution tags
  - Content models
  - Languages
  - Source systems
- Plugins
  - Task Manager
  - All tasks
  - Hooks

The main content area is titled "Process Definitions". It contains two sections: "Drafts / In progress" and "Published".

**Drafts / In progress:**

Name	Version	Edited at	Edited by	Actions
AutoTestProcess-115163...	1	24 May 2022, 12:26 PM	QA FlowX	
AutoTestProcess-410150...	1	24 May 2022, 12:13 PM	QA FlowX	

**Published:**

Name	Version	Published at	Published by	Actions
stepper structure	1	24 May 2022, 12:13 PM	Dragos Caravasile	
AutoTestProcess2736671...	1	24 May 2022, 12:07 PM	QA FlowX	

This screenshot is identical to the one above, but with a cursor hovering over the edit icon for the first row in the "Drafts / In progress" section.

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

The fallback content to display on prerendering 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

Was this page helpful?

# FLOWX.AI DESIGNER / Managing a process flow / Exporting / importing a process definition

To copy

The fallback content to display on prerendering 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

The fallback content to display on prerendering

:

The screenshot shows the FLOWX.AI Designer application. On the left is a sidebar with the following navigation items:

- Processes
  - Definitions (highlighted in blue)
  - Active process
- Content Management
  - Enumerations
  - Substitution tags
  - Content models
  - Languages
  - Source systems
- Plugins
- Task Manager

The main content area is titled "Process Definitions". It includes a search bar and a table header for "Drafts / In progress". The table has columns for Name, Version, Edited at, and Edited by. Two entries are listed:

Name	Version	Edited at	Edited by
AutoTest...	1	23 May 2022, 8:57 PM	QA FlowX
AutoTest...	2	23 May 2022, 8:57 PM	QA FlowX

Below this is another table header for "Published". The table has columns for Name, Version, Published at, and Published by. One entry is listed:

Name	Version	Published at	Published by
Autofest...	1	23 May 2022, 8:59 PM	QA FlowX

## 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

The fallback content to display on prerendering

The screenshot shows the FLOWX.AI Designer application. On the left is a sidebar with the following categories and sub-options:

- Processes**
  - Definitions**
  - Active process
- Content Management**
  - Enumerations
  - Substitution tags
  - Content models
  - Languages
  - Source systems
- Plugins**
  - Task Manager
  - All tasks
  - Hooks

The main content area is titled "Process Definitions". It has two sections: "Drafts / In progress" and "Published".

**Drafts / In progress**

Name	Version	Edited at	Edited by
AutoTestPro...	1	27 May 2022, 11:42 AM	QA FlowX
TA_ActionP...	39	27 May 2022, 9:23 AM	QA FlowX

**Published**

Name	Version	Published at	Published by
AutoTestPro...	1	24 May 2022, 2:59 PM	QA FlowX
AutoTestPro...	1	23 May 2022, 8:53 PM	QA FlowX

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.

**Was this page helpful?**

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

The fallback content to display on prerendering  
in

The fallback content to display on prerendering  
can be edited with ease. To keep track of updates and changes, each definition is assigned a version number and state.

### Process Definitions

Search by process definition name:

Drafts / In progress				
Name	Version	Edited at	Edited by	
Test 1	1	27 May 2022, 12:03 PM	John Doe	
Test 2	5	26 May 2022, 4:49 PM	Jane Doe	

Published				
Name	Version	Published at	Published by	
Test 3	4	26 May 2022, 12:49 PM	John Doe	
Test 4	1	24 May 2022, 12:13 PM	Jane Doe	

A Process Definition is unique and can be identified by its name and version number. It can have one of the following states:

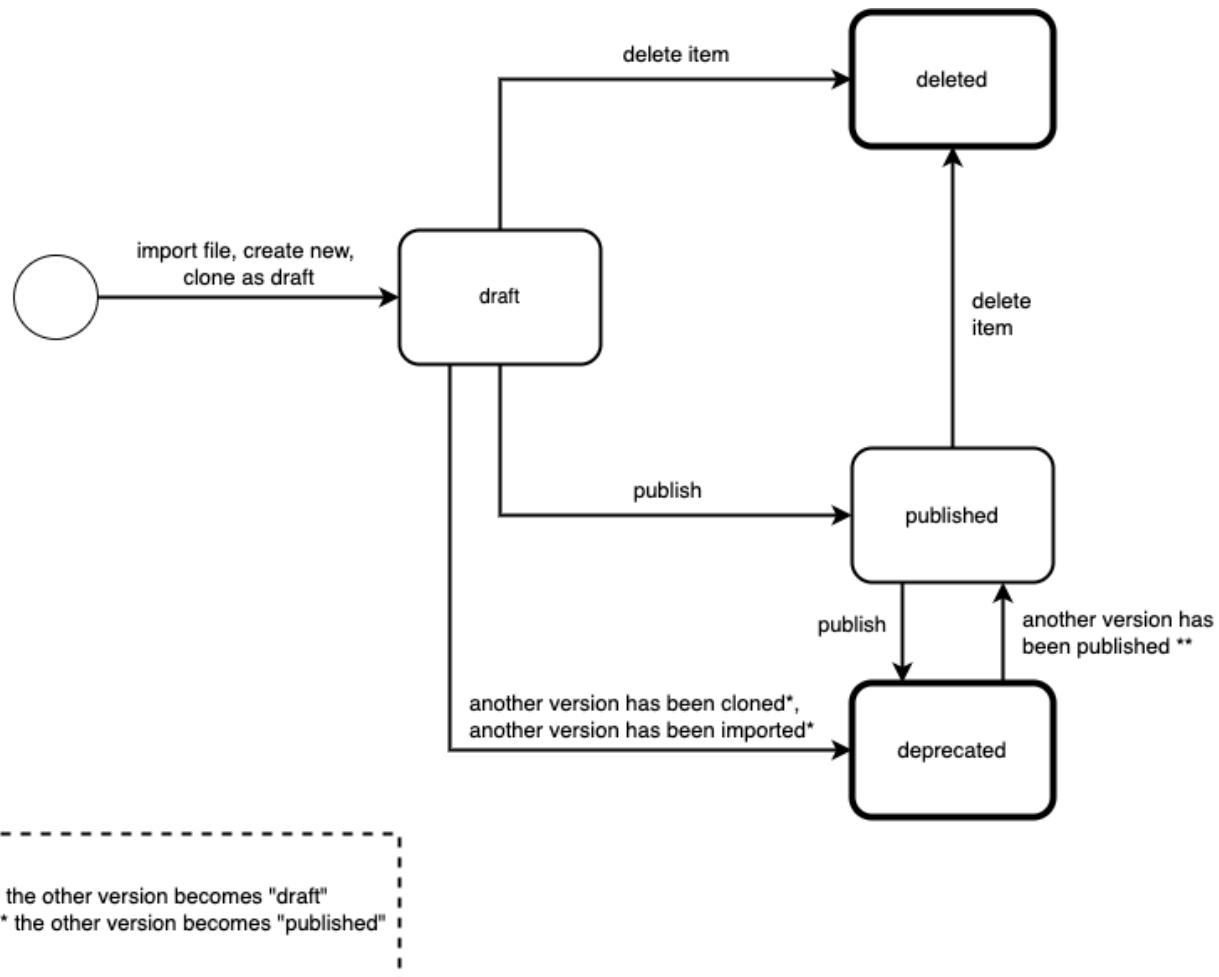
- **draft** - in progress and can't be used to create  
The fallback content to display on prerendering  
, can only be started in test mode
- **published** - only one version can be published at a time, and it will be used to  
instantiate new processes; published versions can be edited
- **deleted** - 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

The fallback content to display on prerendering  
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`

Was this page helpful?

# FIOWX.AI DESIGNER / Designer setup guide / Configuring access rights for Admin

Granular access rights can be configured for restricting access to the Admin component.

Access authorizations are provided, each with specified access scopes:

## 1. Manage-platform - for configuring access for managing platform details

Available scopes:

- **read** - users are able to view platform status
- **admin** - users are able to force health check scan

## 2. Manage-processes - for configuring access for managing process definitions

Available scopes:

- **import** - users are able to import process definitions and process stages
- **read** - users are able to view process definitions and stages
- **edit** - users are able to edit process definitions
- **admin** - users are able to publish and delete process definitions, delete stages, edit sensitive data for process definitions

## 3. Manage-configurations - for configuring access for managing generic parameters

Available scopes:

- **import** - users are able to import generic parameters
- **read** - users are able to view generic parameters
- **edit** - users are able to edit generic parameters
- **admin** - users are able to delete generic parameters

#### 4. **Manage-users** - for configuring access for access management

Available scopes:

- **read** - users are able to read all users, groups and roles
- **edit** - users are able to create/update any user group or roles
- **admin** - users are able to delete users, groups or roles

#### 5. **Manage-integrations** - for configuring integrations with adapters

Available scopes:

- **import** - users are able to import integrations
- **read** - users are able to view all the integrations, scenarios and scenarios configuration(topics/ input model/ output model/ headers)
- **edit** - users are able to create/update/delete any values for integrations/scenarios and also scenarios configuration (topics/input model/ output model/ headers)
- **admin** - users are able to delete integrations/scenarios with all children

The Admin service is configured with the following default users roles for each of the access scopes mentioned above:

- **manage-platform**

- read:
    - ROLE\_ADMIN\_MANAGE\_PLATFORM\_READ
    - ROLE\_ADMIN\_MANAGE\_PLATFORM\_ADMIN
  - admin:
    - ROLE\_ADMIN\_MANAGE\_PLATFORM\_ADMIN

- **manage-processes**

- import:
    - ROLE\_ADMIN\_MANAGE\_PROCESS\_IMPORT
    - ROLE\_ADMIN\_MANAGE\_PROCESS\_EDIT
    - ROLE\_ADMIN\_MANAGE\_PROCESS\_ADMIN
  - read:
    - ROLE\_ADMIN\_MANAGE\_PROCESS\_READ
    - ROLE\_ADMIN\_MANAGE\_PROCESS\_IMPORT
    - ROLE\_ADMIN\_MANAGE\_PROCESS\_EDIT
    - ROLE\_ADMIN\_MANAGE\_PROCESS\_ADMIN
  - edit:
    - ROLE\_ADMIN\_MANAGE\_PROCESS\_EDIT
    - ROLE\_ADMIN\_MANAGE\_PROCESS\_ADMIN
  - admin:
    - ROLE\_ADMIN\_MANAGE\_PROCESS\_ADMIN

- **manage-configurations**

- import:
    - ROLE\_ADMIN\_MANAGE\_CONFIG\_IMPORT
    - ROLE\_ADMIN\_MANAGE\_CONFIG\_EDIT
    - ROLE\_ADMIN\_MANAGE\_CONFIG\_ADMIN

- read:
  - ROLE\_ADMIN\_MANAGE\_CONFIG\_READ
  - ROLE\_ADMIN\_MANAGE\_CONFIG\_IMPORT
  - ROLE\_ADMIN\_MANAGE\_CONFIG\_EDIT
  - ROLE\_ADMIN\_MANAGE\_CONFIG\_ADMIN
- edit:
  - ROLE\_ADMIN\_MANAGE\_CONFIG\_EDIT
  - ROLE\_ADMIN\_MANAGE\_CONFIG\_ADMIN
- admin:
  - ROLE\_ADMIN\_MANAGE\_CONFIG\_ADMIN
- **manage-users**
  - read:
    - ROLE\_ADMIN\_MANAGE\_USERS\_READ
    - ROLE\_ADMIN\_MANAGE\_USERS\_EDIT
    - ROLE\_ADMIN\_MANAGE\_USERS\_ADMIN
  - edit:
    - ROLE\_ADMIN\_MANAGE\_USERS\_EDIT
    - ROLE\_ADMIN\_MANAGE\_USERS\_ADMIN
  - admin:
    - ROLE\_ADMIN\_MANAGE\_USERS\_ADMIN
- **manage-integrations**
  - import:
    - ROLE\_ADMIN\_MANAGE\_INTEGRATIONS\_IMPORT
    - ROLE\_ADMIN\_MANAGE\_INTEGRATIONS\_EDIT
    - ROLE\_ADMIN\_MANAGE\_INTEGRATIONS\_ADMIN
  - read:

- ROLE\_ADMIN\_MANAGE\_INTEGRATIONS\_READ
  - ROLE\_ADMIN\_MANAGE\_INTEGRATIONS\_IMPORT
  - ROLE\_ADMIN\_MANAGE\_INTEGRATIONS\_EDIT
  - ROLE\_ADMIN\_MANAGE\_INTEGRATIONS\_ADMIN
- edit:
    - ROLE\_ADMIN\_MANAGE\_INTEGRATIONS\_EDIT
    - ROLE\_ADMIN\_MANAGE\_INTEGRATIONS\_ADMIN
  - admin:
    - ROLE\_ADMIN\_MANAGE\_INTEGRATIONS\_ADMIN

### DANGER

These roles need to be defined in the chosen identity provider solution. It can be either kycloak, RH-SSO, or other identity provider solution.

In case other custom roles are needed, you can configure them using environment variables. More than one role can be set for each access scope.

To configure access for each of the roles above, adapt the following input:

**SECURITY\_ACCESSAUTHORIZATIONS\_AUTHORIZATIONNAME\_SCOPES\_SCOPENAME\_ROLESALLOWED: NEEDED\_ROLE\_NAMES**

Possible values for **AUTHORIZATIONNAME**: **MANAGEPLATFORM**,  
**MANAGEPROCESSES**, **MANAGECONFIGURATIONS**, **MANAGEUSERS**.

Possible values for **SCOPENAME**: import, read, edit, admin.

For example, if you need to configure role access for read, insert this:

SECURITY\_ACCESSAUTHORIZATIONS\_MANAGEPROCESSES\_SCOPES\_READ\_ROLES  
ROLE\_NAME\_TEST

**Was this page helpful?**