



**FIOWX.AI DESIGNER / overview**

# Contents

- **FIOWX.AI DESIGNER / Overview**
  - Managing process definitions
  - Viewing active process instances
  - Managing CMS
  - Managing tasks
  - Managing notification templates
  - Managing document templates
  - Managing generic parameters
  - Managing users access
  - Managing integrations
  - Checking platform status

## FIOWX.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

# FLOWX.AI

-  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.

**FLOWX.AI**

Processes

Definitions

Active process

Content Management

Enumerations

Substitution tags

Content models

Languages

Source systems

Plugins

Task Manager

All tasks

Hooks

Stages

Process Definitions

Search by process definition name

Drafts / In progress

Name	Version	Edited at	Edited by	
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	
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.

FLOWX.AI

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

Active processes

Filter by process definition

Search by uuid or key identifier

Process uuid	Definition name	Status	Current Node Name	Start date	
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.

FLOWX.AI

Processes

Content Management

Plugins

General Settings

Platform status

Logout

Process Definitions

Search by process d

Drafts / In progress

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

Published

Na	Version	Published at	Published by
	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.



FLOWX.AI

Processes

Content Management

Enumerations

Substitution tags

Content models

Languages

Source systems

Plugins

Task Manager

All tasks

Hooks

Stages

Notification templates

Document templates

General Settings

Platform status

Activities

StatusStages · 2Search

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

.

Notifications Template - ExampleTemplate

**Body** Data model

Type  
MAIL

☐ Forward on Kafka

Language  
Romanian (Romania)-ro-RO

Romanian (Romania)-ro-RO subject  
Contract [\$(firstInput)]

Source

Logout

Test

Save Publish

» 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.

FLOWX.AI

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

Logout

Documents Templates - ExampleTemplate

Body

Data model

Language

Romanian (Romania) - ro-RO

Source

Cut Copy Paste Undo Redo Bold Italic Underline Strikethrough Link Unlink Bulleted List Numbered List Indent Outdent Quote Styles Normal Help

Template generated for the FLOWX.AI Academy by  
  
#firstInput  
  
#secondInput  
  
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  
body p

Test

Save

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.

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











Users

Roles

Groups

Generic Parameters

New parameter

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

FLOWX.AI

Processes

Content Management

Plugins

General Settings

Generic Parameters

Licensing

Access management

Users











Roles

Groups

Platform status

Users

Search users

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

Content management

Enumerations

Substitution tags

Content models

Languages

Source systems

🔌 Plugins

⚙️ General Settings

Generic Parameters

Integration management

Licensing

Access management

JD John Doe

Integrations

New integration

	Name	Identifier	System name		
>	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.

Content models

Languages

Source systems

⚙️ Plugins

Task Manager

All tasks

Hooks

Stages

Notification templates

Document templates

⚙️ General Settings

Generic Parameters

Licensing

Access management

Users

Roles

Groups

🔍 Platform status

Platform Status 2.7.0

Force rescan

Flowx Components

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	👁

Other Components

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?