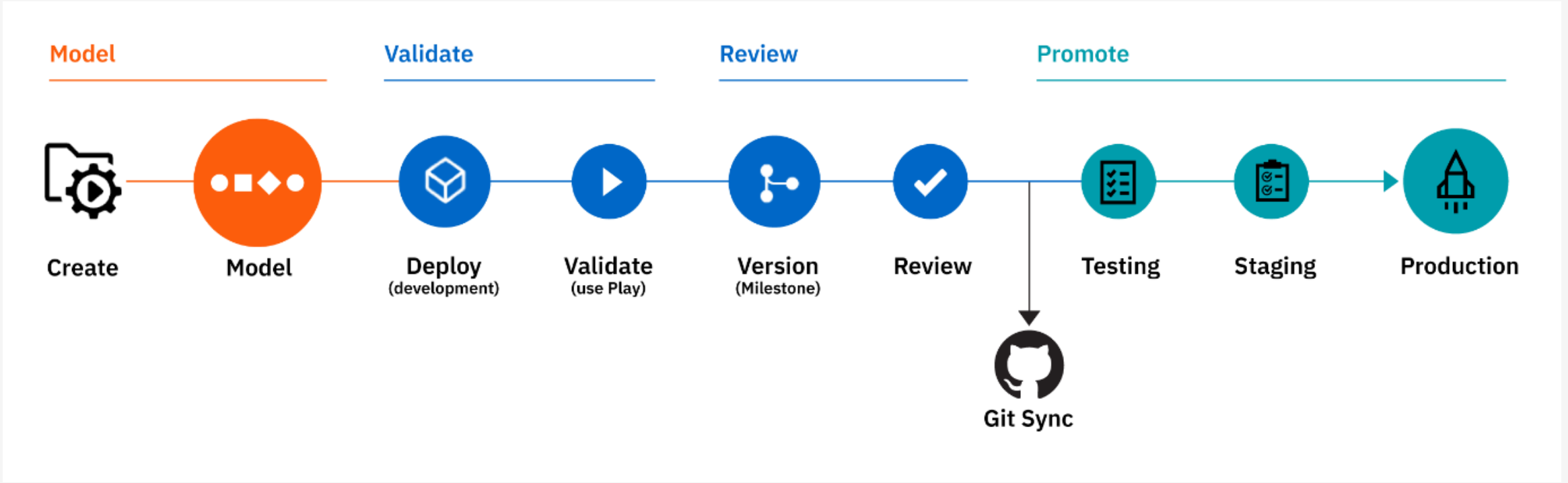
Camunda 8 - Web Modeler Overview

Process Application

You can use the Web Modeler development pipeline to quickly develop and progress low-risk process application releases through the stages of a standard development lifecycle.

Stages of the Development Lifecycle



Model

Create Process Application: Create a process application and select a default development cluster to deploy to.

Collaborate: Invite other users to collaborate on the process application.

Define Clusters and Stages: Define and set up the clusters and deployment stages you will use in your development pipeline.

Model Diagrams: Model your diagrams and associated resources, and fix errors shown in the modeler.

Token Simulation: Use token simulation to correct and optimize your process flow.

Validate

Deploy to Development Cluster: When your process application is ready for validation, you can deploy it to your development cluster.

Play Mode: Use Play mode to quickly validate the process behavior and play different scenarios.

Deployment Validation: Validate that all files and resources are correctly deployed.

Review

Versioning and Tracking: Use process application versioning to track and review changes across the files and assets in the process application.

Version Comparison: Compare versions to visually review changes between two versions of a BPMN file, or view code changes for other files.

Comments for Collaboration: Use comments to facilitate review collaboration.

Approval Indication: Approvers can add a comment to the main process diagram to indicate that a review is complete and that the process application is ready to be promoted to the next stage.

Promote

Promote to Next Stages: Promote the versioned process application to the next stages of the deployment pipeline, such as testing, staging, and finally production.

Git Sync: If desired, use Git Sync to deploy and promote the process application through your own pipeline after the review is complete.

Deployment Pipeline Stages

Development: Use to create and test new software features and changes.

Testing: Use for quality checks, ensuring software meets defined standards before release.

Staging: Use for controlled testing where changes are validated before deployment to production.

Production: The live system with the latest software. Only administrators and organization owners can deploy to this stage.

Differences Between Business Analysts, Developers, and System Administrators

Business Analysts

Focus on Requirements and Communication: Business analysts typically focus on gathering requirements and communicating with stakeholders to create the first draft of the models.

Strategic BPMN Diagrams: They create strategic BPMN diagrams and raise business processes from requirements.

Review and Guidelines: They review BPMN and DMN diagrams against guidelines and create BPMN modeling guidelines.

KPI Evaluation and Process Improvement: They evaluate KPIs based on automated processes, identify weak points in processes, and suggest improvements.

Developers

Technical Implementation: Developers add all technical details to make the process model executable, such as implementing script tasks using FEEL, configuring out-of-the-box connectors, and creating custom connectors.

Process Tests: They create process tests (unit tests) and set up the development environment.

System Architecture: They design and plan process solutions and system architecture, decide on deployment options, and plan the setup of Camunda 8 self-managed using various tools like Helm/Kubernetes or Docker.

Custom Tasklist: They create custom tasklists and manage the technical aspects of the process application.

System Administrators

Cluster and Stage Definition: System administrators define the clusters and deployment stages used in the development pipeline.

Deployment Privileges: Only system administrators and organization owners can deploy to production-tagged clusters.

Governance and Control: They ensure that deployments are made only to the pre-defined set of approved clusters and manage user privileges for deployment actions.

Logging and Monitoring: They log each deployment action with information on the user and stage it was deployed to, ensuring proper governance and control.

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Create

Create a project

Overview

Start by creating a project in the Web Modeler.

This project will contain all of the application configuration that you will be working with.

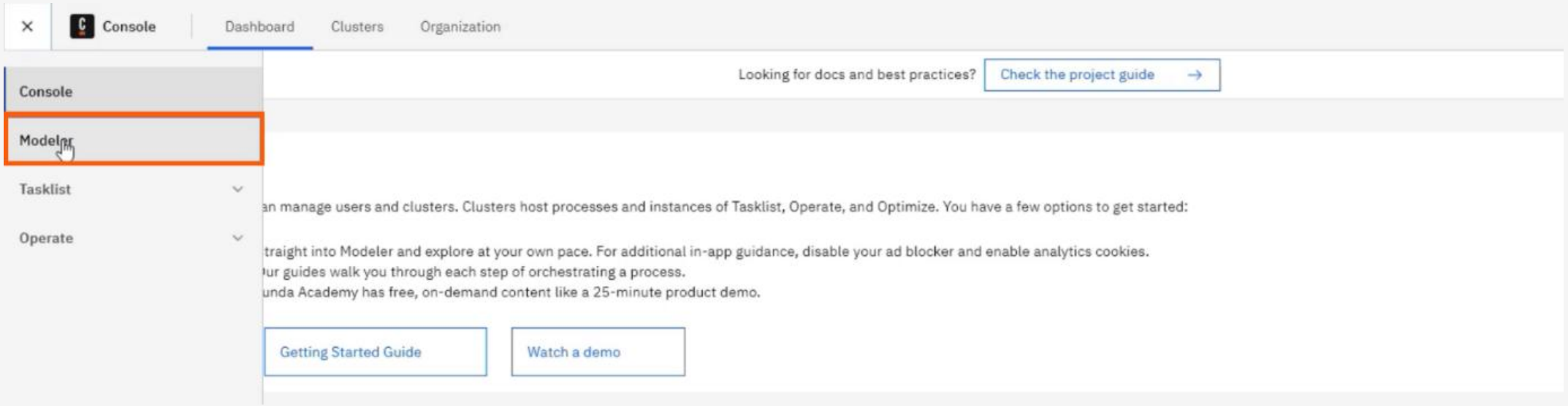
What is a project?

A project is a top-level organizational component for objects in Camunda. Projects group BPMN and DMN diagrams, forms, connector templates, process applications and folders into a logical project that represents a business process.

Create a project

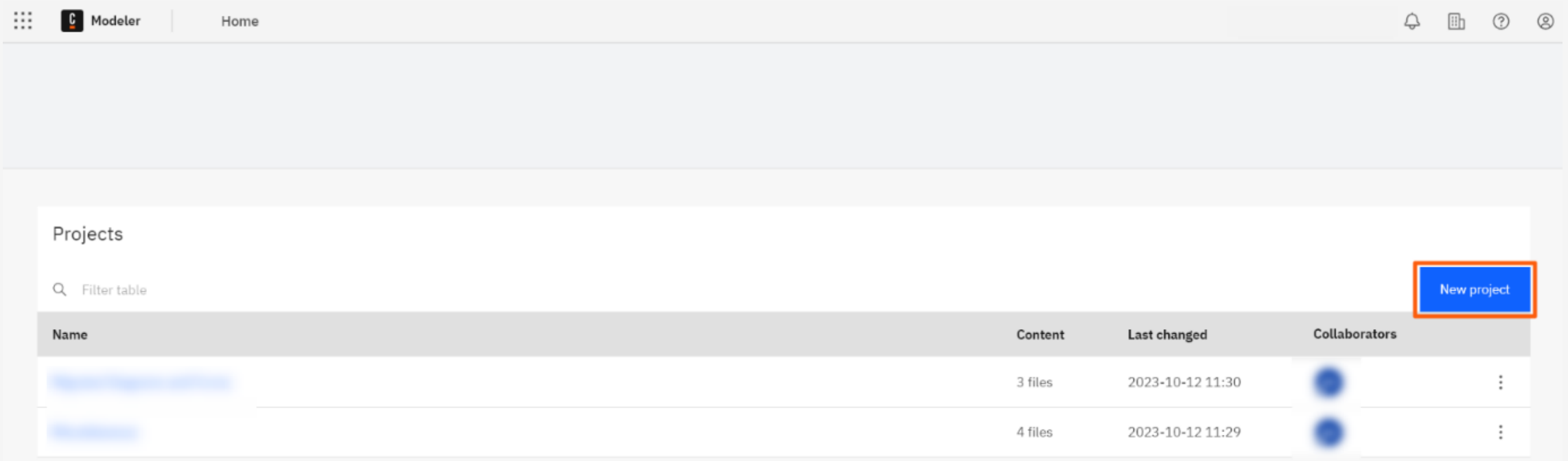
Create a new project by following the steps below:

From the Console, navigate to the Modeler.



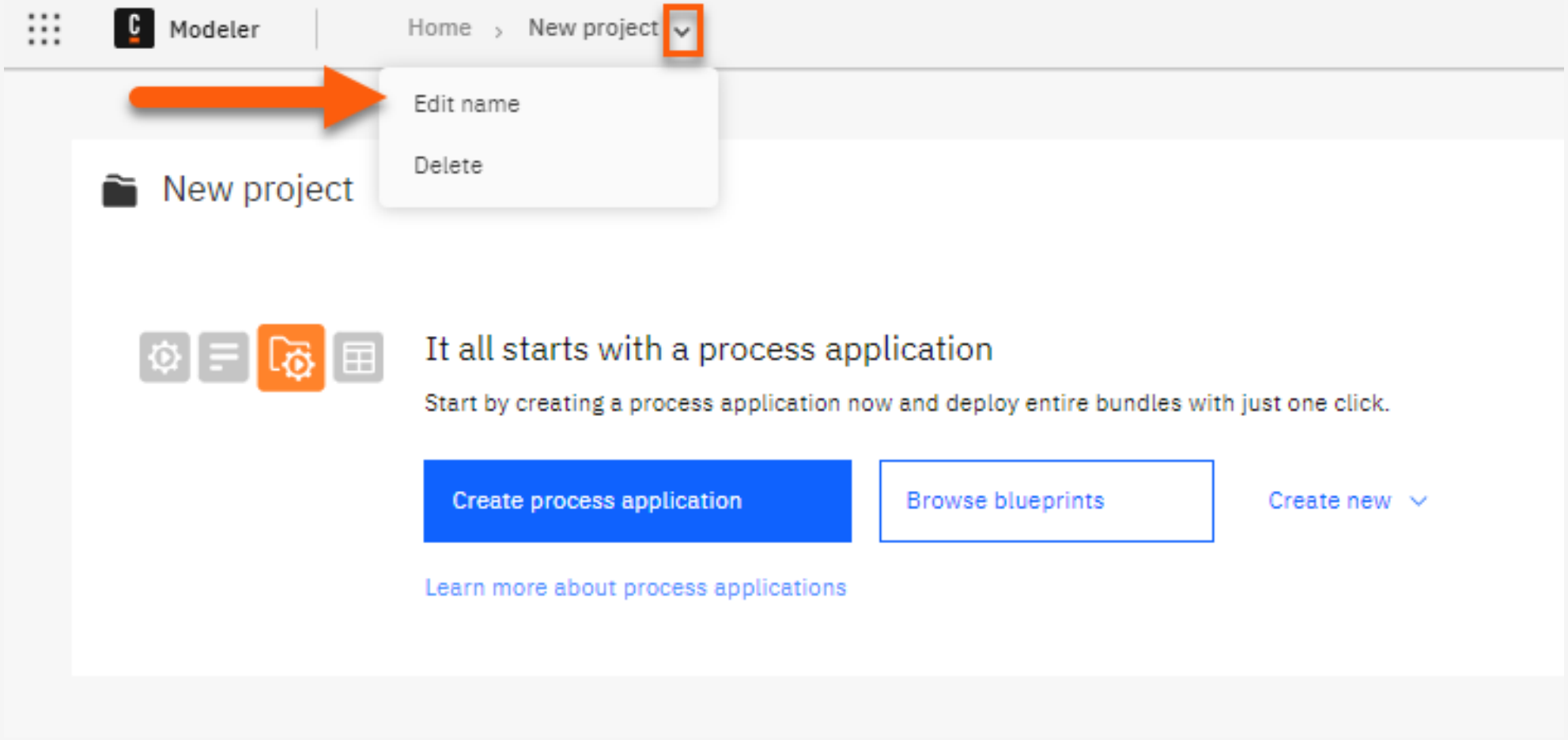
Create a project

From the Modeler, click **New project**.



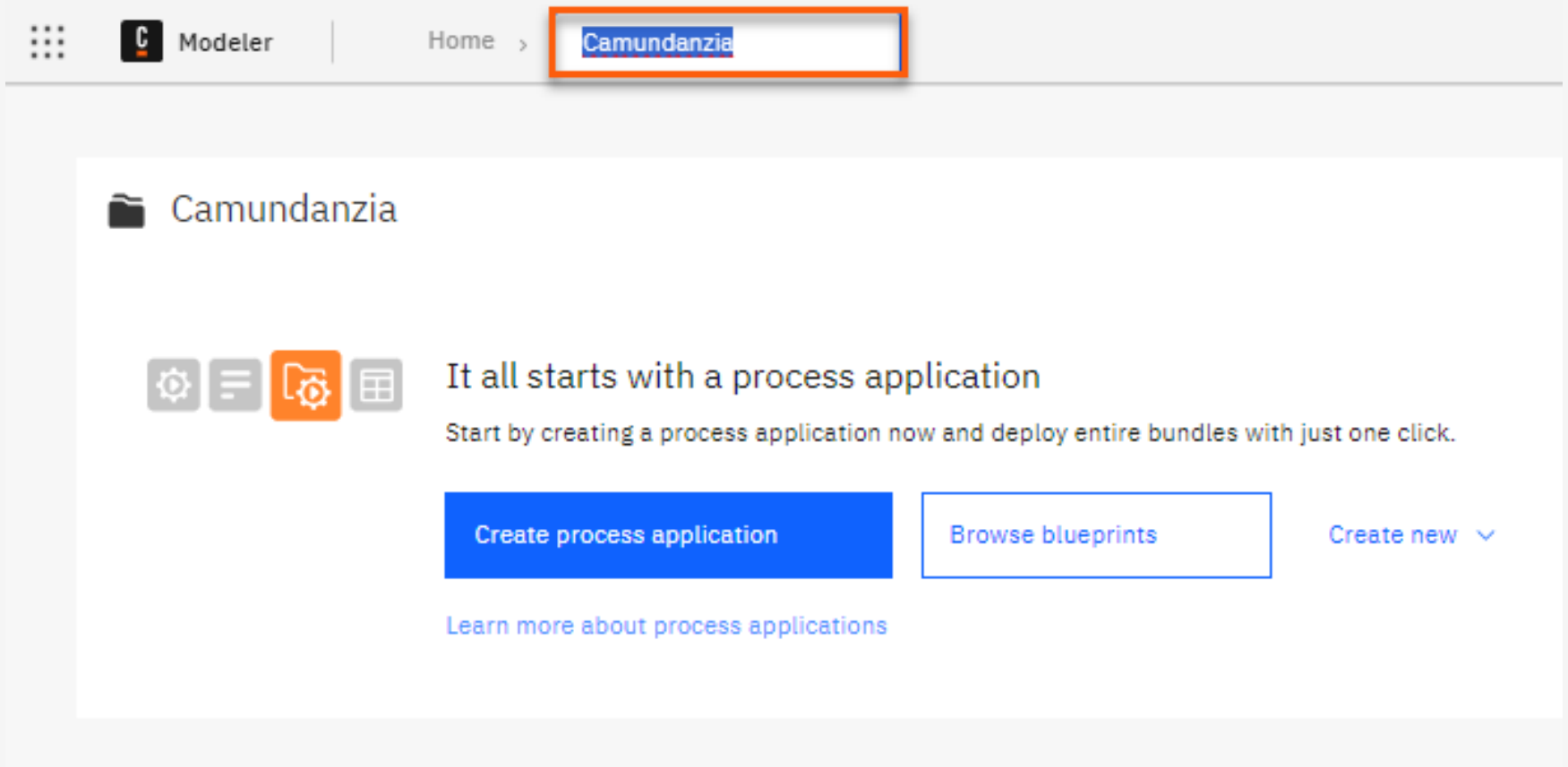
Create a project

In the project name field, click **Edit name**.



Create a project

Enter a new project name: **Camundanzia**.



Structure your project

Managing projects in Camunda Web Modeler is essential for organizing your business processes effectively.

Organizing your projects in Camunda Web Modeler helps in:

- **Streamlining Management**: Simplifies the management of multiple projects and processes.
- **Access Control**: You can set permissions and access controls at project level (Camundanzia) to ensure that only authorized users can view or edit the different components.
- **Collaboration**: Team members can easily find and collaborate on projects, improving efficiency and reducing the chances of working on the wrong project.

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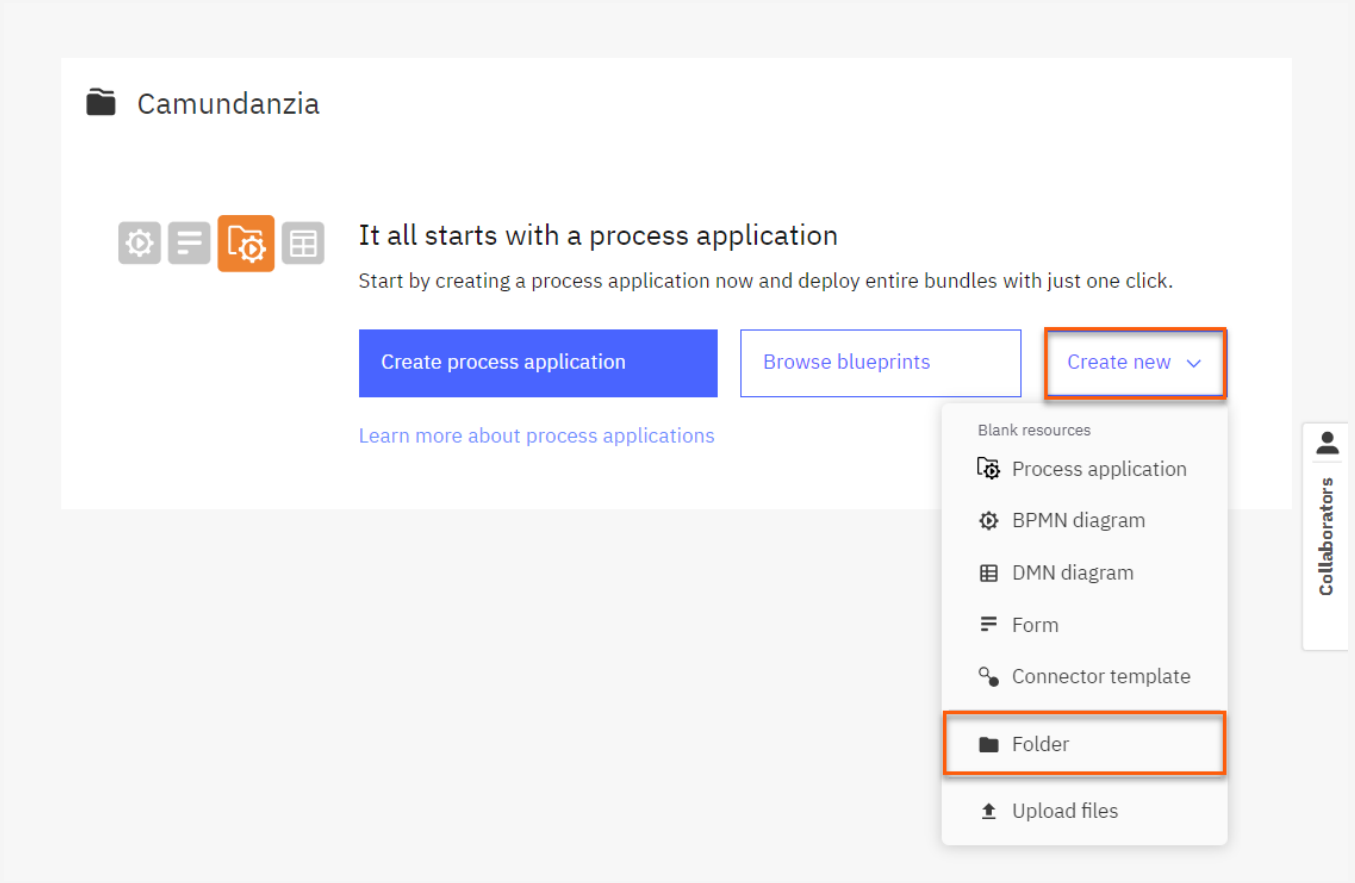
Creating Folders in Camunda Web Modeler

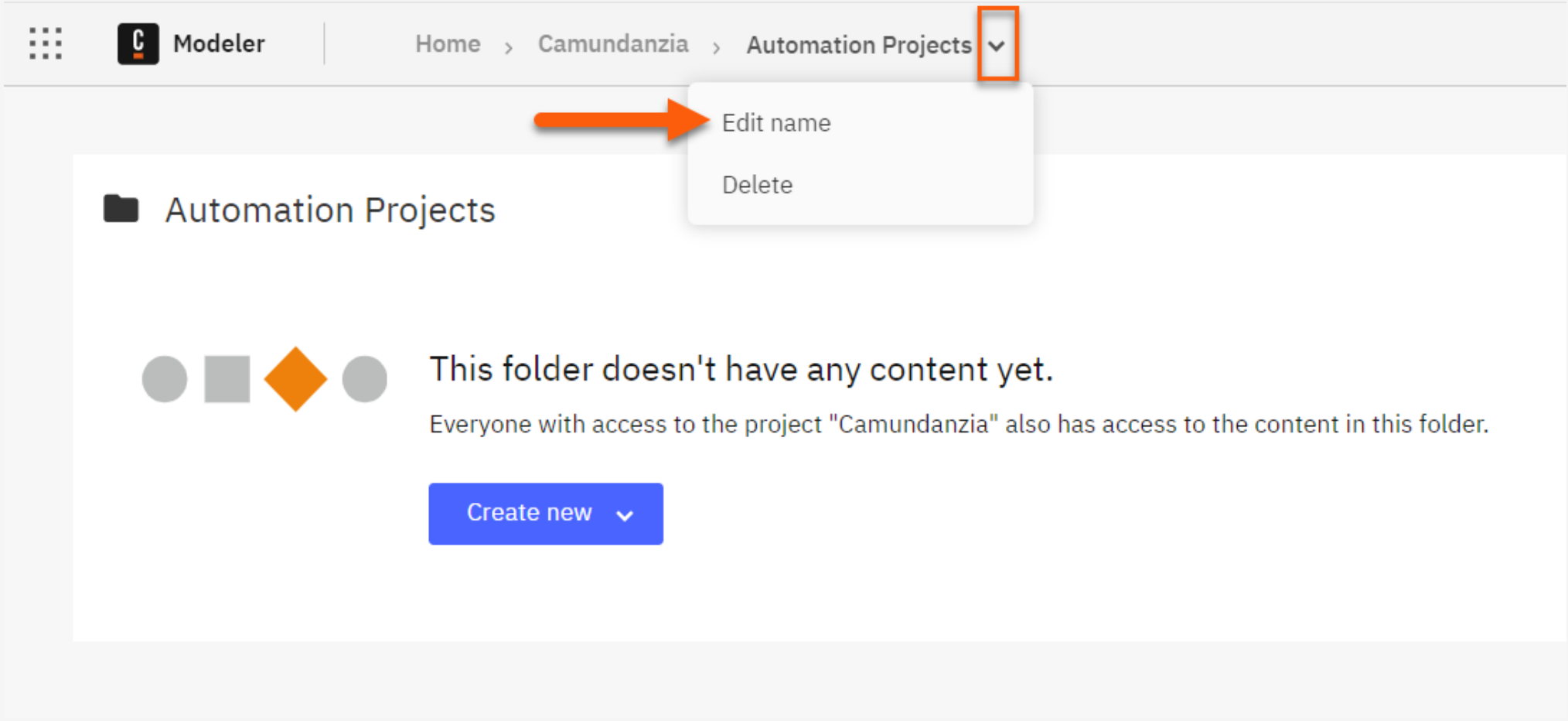
To organize your projects, you can create folders. Here's an example on how you can do it:

Click **Create new** > **Folder**



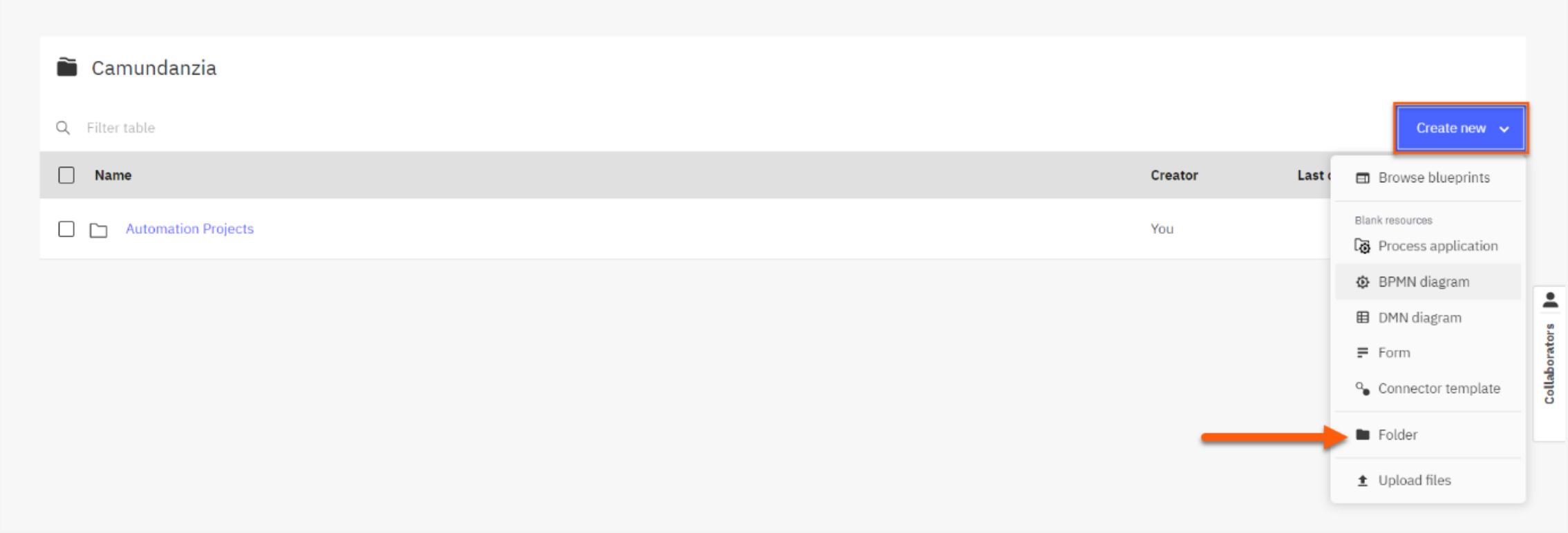
Creating Folders in Camunda Web Modeler

Name your folder **Automation Projects**



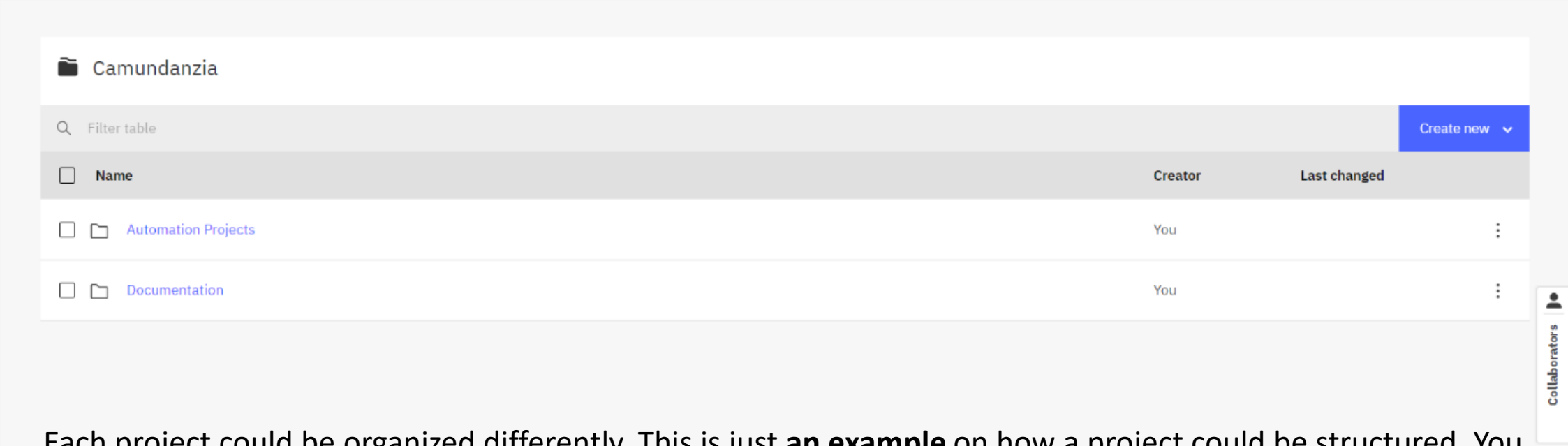
Creating Folders in Camunda Web Modeler

Create a second folder named **Documentation** from Camundanzia's project



Creating Folders in Camunda Web Modeler

At the end your project should look like this:



Each project could be organized differently. This is just **an example** on how a project could be structured. You should adapt the structure of your project accordingly.

After creating the folders, you can start organizing your project.

Automation Projects Folder

Purpose: This folder is for the components where the **process applications** live. These are the processes that are actively used in your business operations and are automated.

Contents: Include all the BPMN diagrams, decision tables, forms, and other artifacts related to the automation of business processes.

Examples: Order processing, customer onboarding, invoice management, etc.

Documentation Folder

Purpose: This folder is for components or single processes used for documentation purposes. These are not necessarily automated but are important for understanding and documenting business processes.

Contents: Include process models that serve as documentation, training materials, process descriptions, and any other relevant documentation.

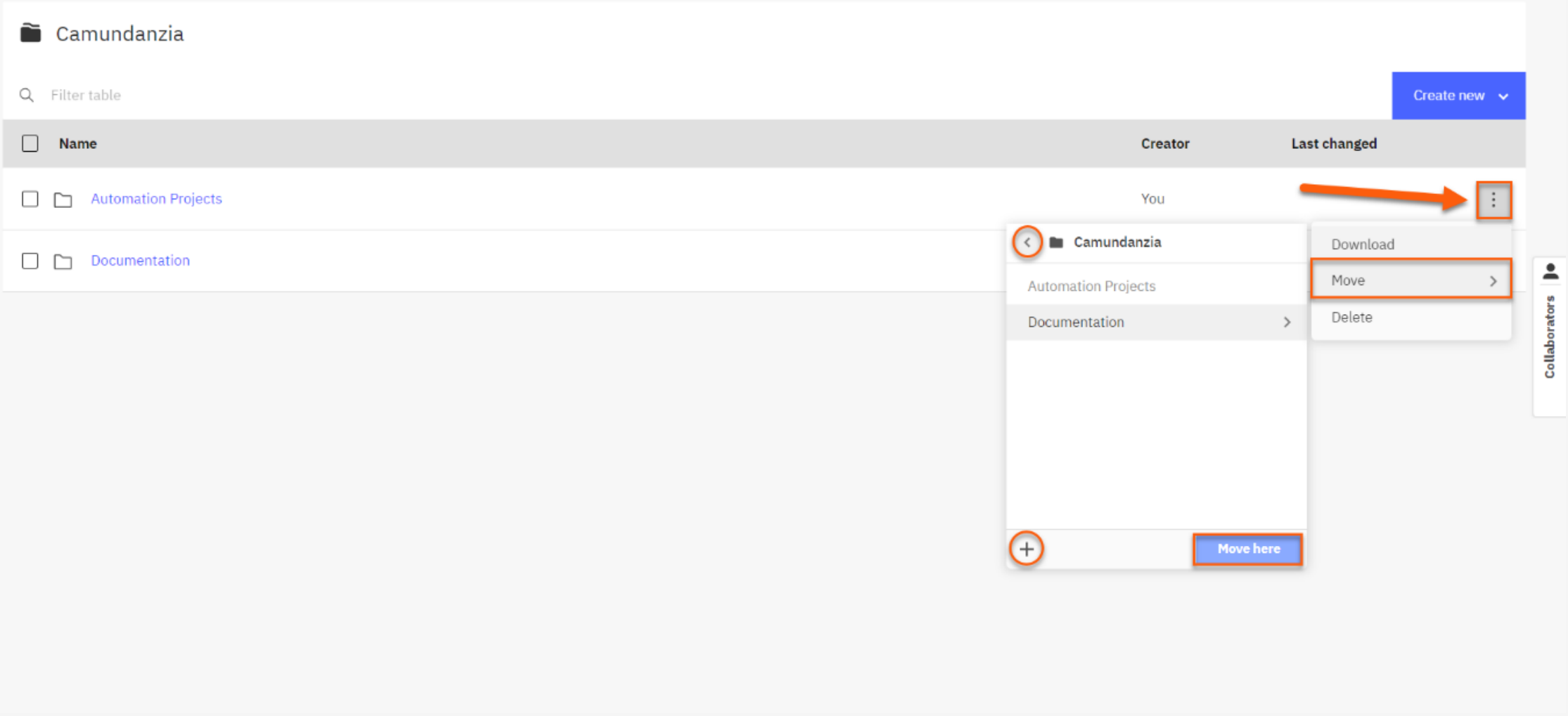
Examples: Process documentation for compliance, training process models, process improvement documentation, etc.

Managing and Using the Folders

Adding Components: When creating a new component, you can choose the appropriate folder to save it in. This ensures that your projects are categorized correctly from the start.

Moving Projects: If you have existing components, you can move them into the appropriate folders by selecting the component and choosing the “Move” option.

Managing and Using the Folders



Create

Sync with GitHub

Sync with GitHub

The **Sync with GitHub** feature allows you to synchronize your process models and related components (process application) with a **GitHub/GitLab** repository. This integration provides several benefits:

- **Collaboration**: Multiple team members can work on the same process models and merge their changes.
- **Version Control**: Despite it's included for some components in the Modeler by default, this is the common way developers share and track content changes over time.
- **CI/CD**: Automate the deployment of process applications using GitHub Actions or other CI/CD tools.

Use case

You are a new employee who has just joined a company that uses Camunda for managing their business processes.

Your company has an existing process application developed using the **Camunda Desktop Modeler**.

The team has decided to move their process models to the **Camunda Web Modeler** and **synchronize** them with a **GitHub repository**, so every change is properly reviewed and approved.

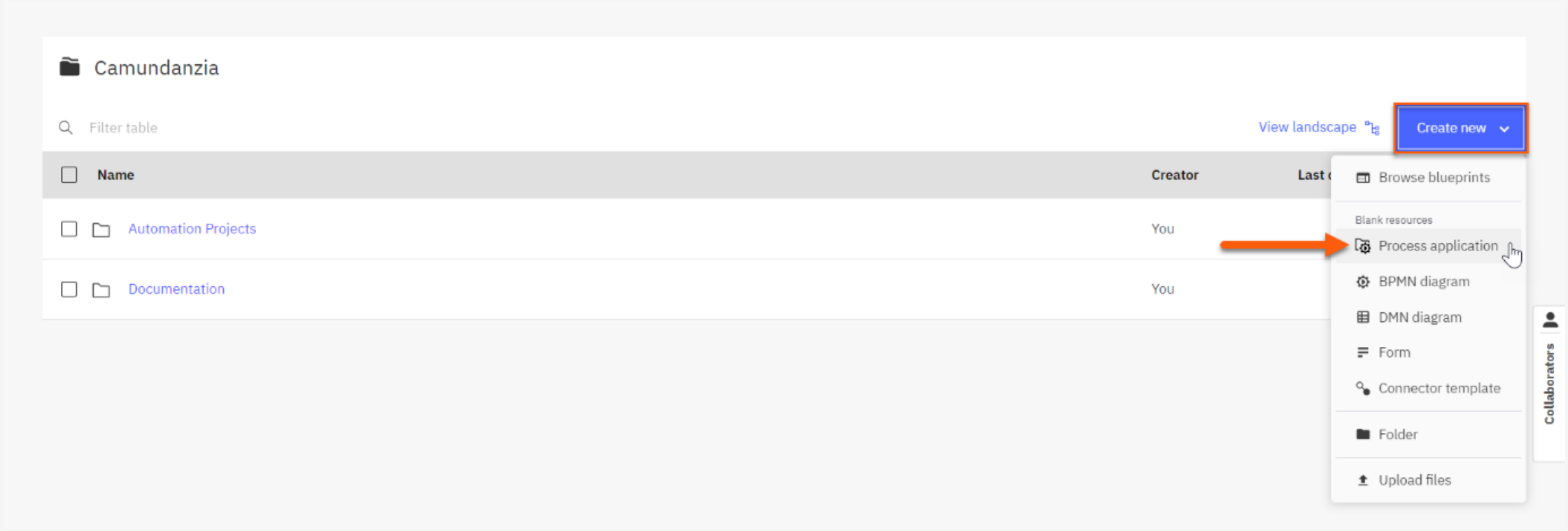
The **goal** is to get a **better collaboration and version control**.

Your task is to **synchronize the existing process application repository** using the **Sync. with Git feature** of the Camunda Web Modeler.

Connect with a repository

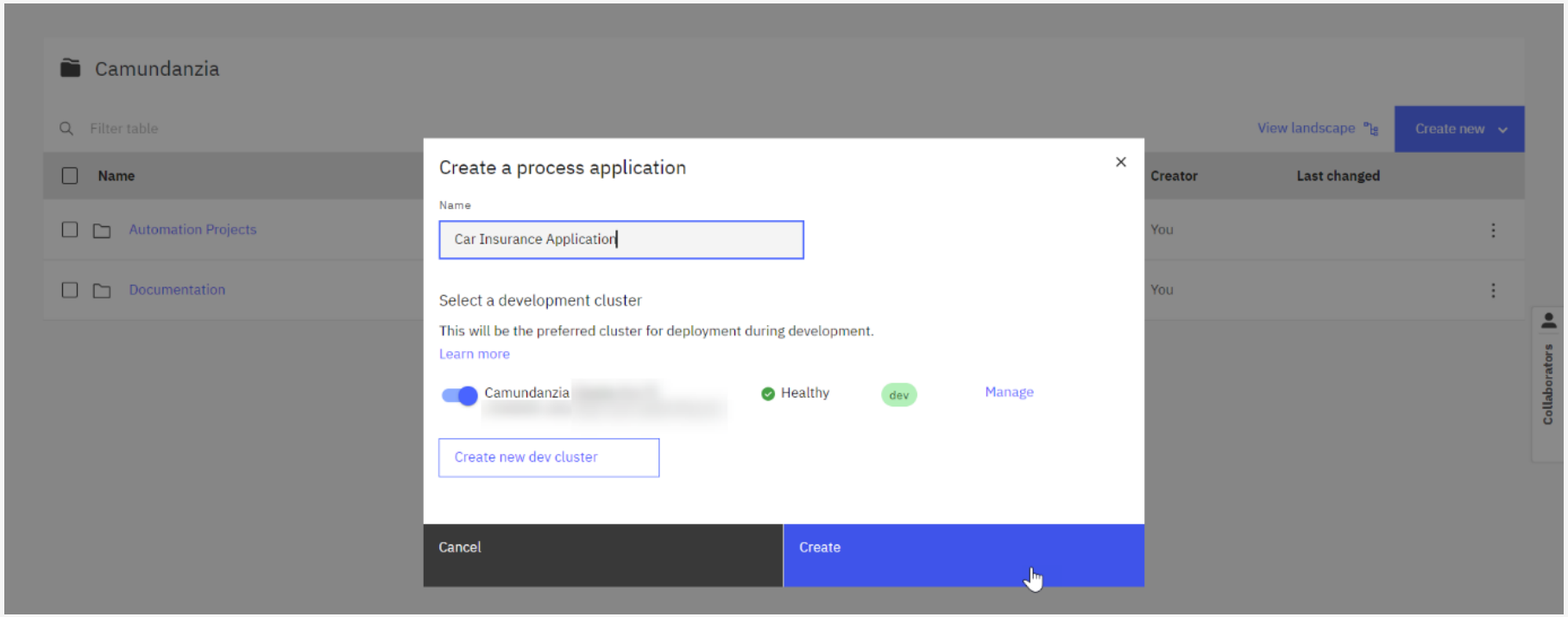
You need to create a new **Process application** into the Camundanzia's project.

- Create a new Process application



Connect with a repository

- Name the Process application: **Car Insurance Application**
- Select/Create your development cluster
- Click **Create**

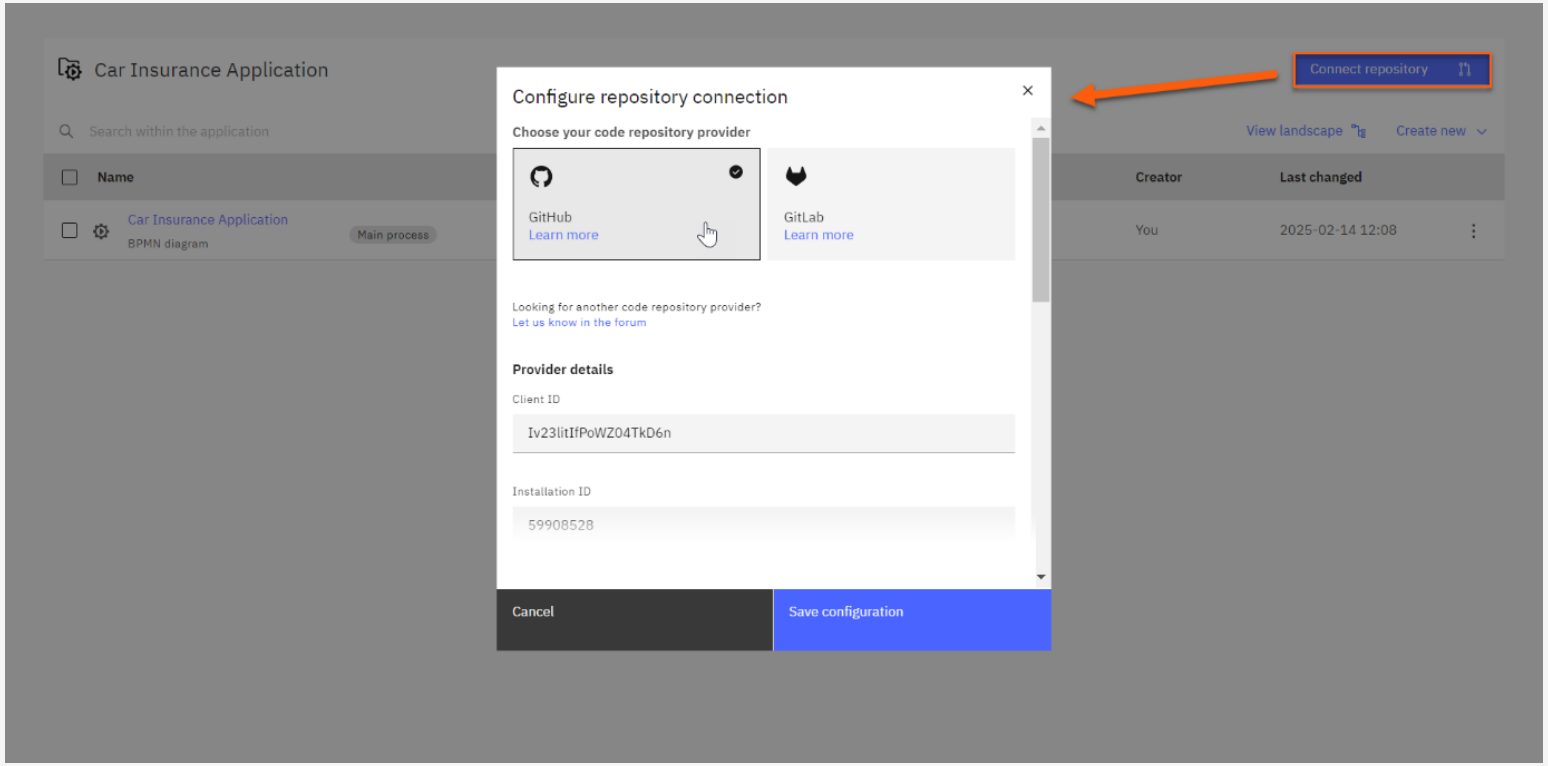


A Process application needs to have a **Main process**. It was automatically generated with the name of the Process application.

Connect with a repository

Now you can follow the steps to connect this Process application to a repository.

- Click **Connect repository**
- Select **GitHub**



Connect with a repository

Use these **Provider details**:

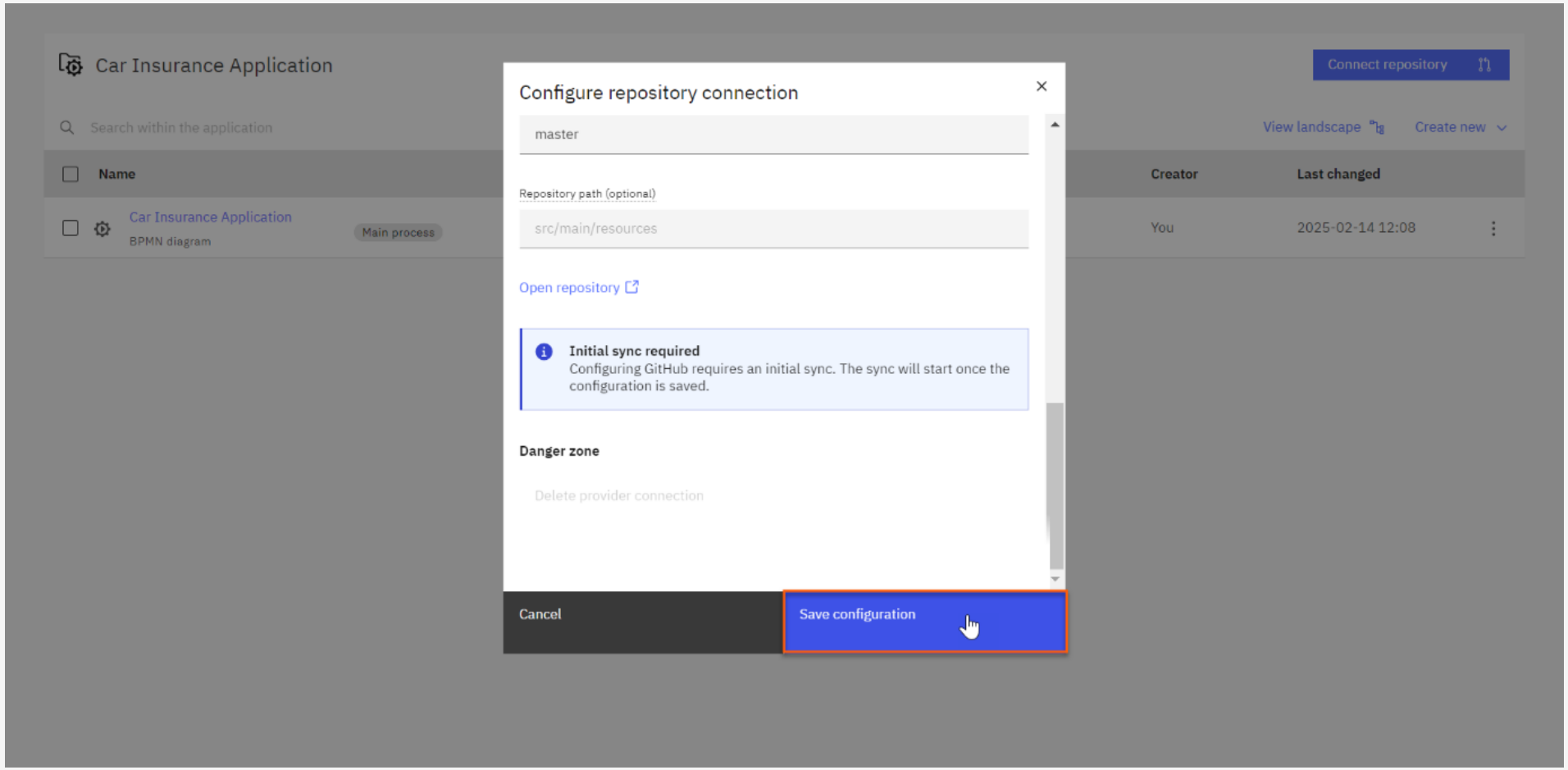
- **Client ID**: Iv23litIfPoWZ04TkD6n
- **Installation ID**: 59908528
- **Private key**:

And these **Repository details**:

- **URL**: https://github.com/camunda-academy/c8-getting-started
- **Branch**: master

Connect with a repository

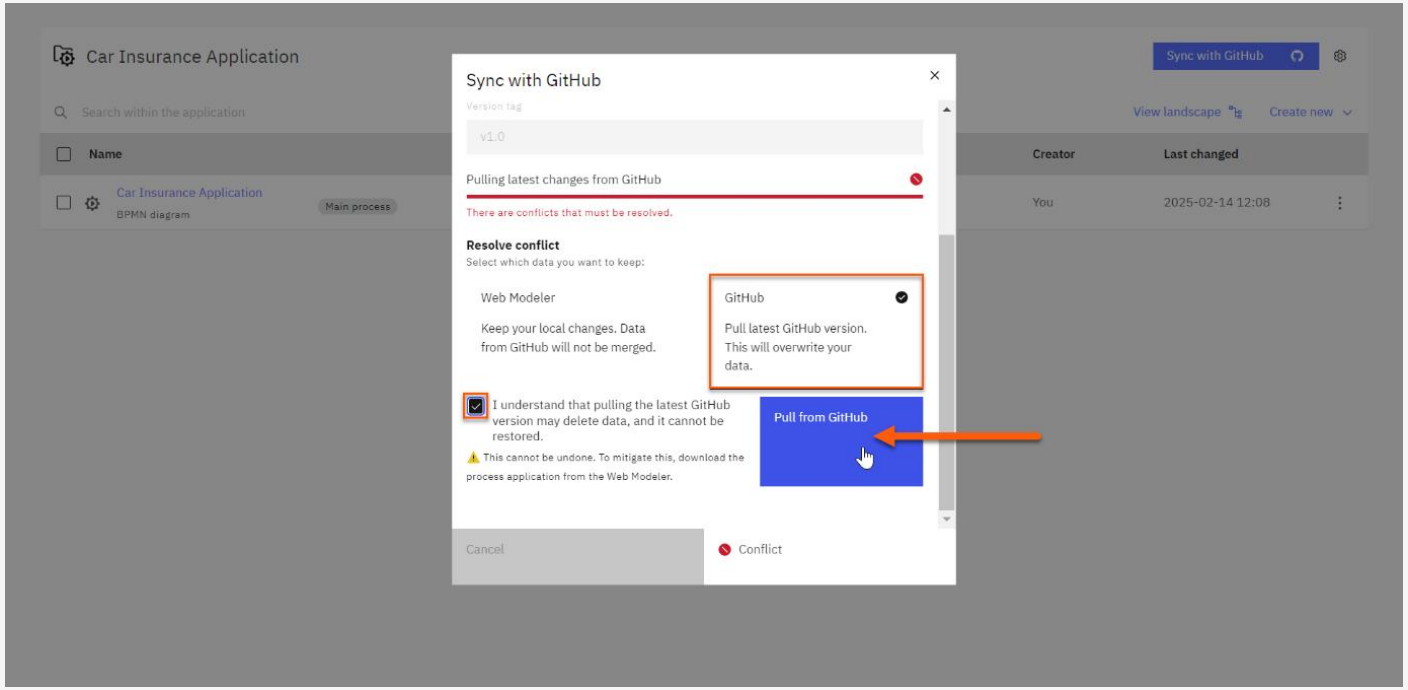
Click **Save configuration**



Connect with a repository

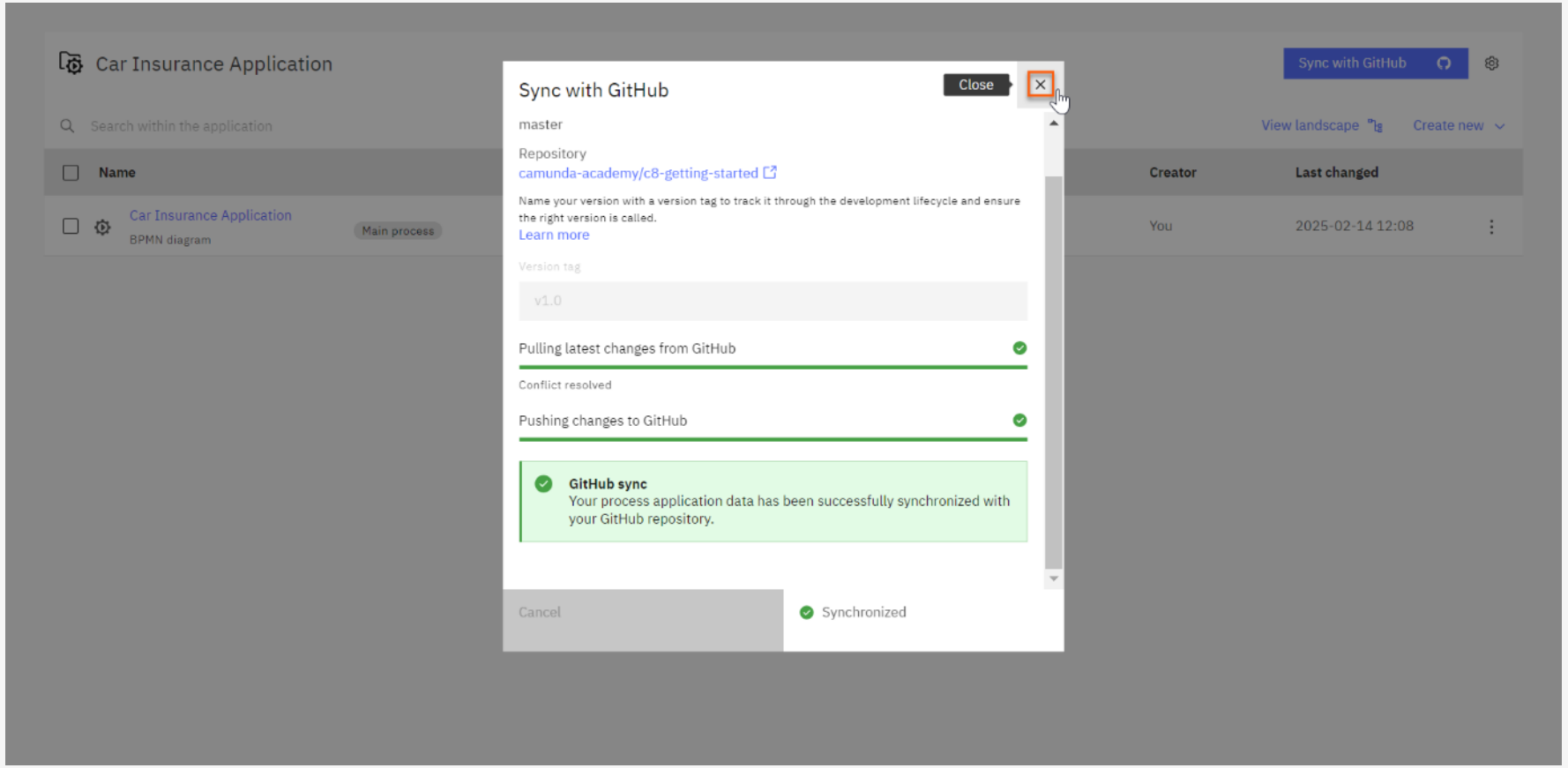
Now, the synchronizer will try to pull the latest changes from GitHub, but it will find a conflict.

1. Click **GitHub** to overwrite the existing process application content with the one provided.
2. **Check** the confirmation box
3. Click **Pull from GitHub**



Connect with a repository

The Process application is now synchronized.

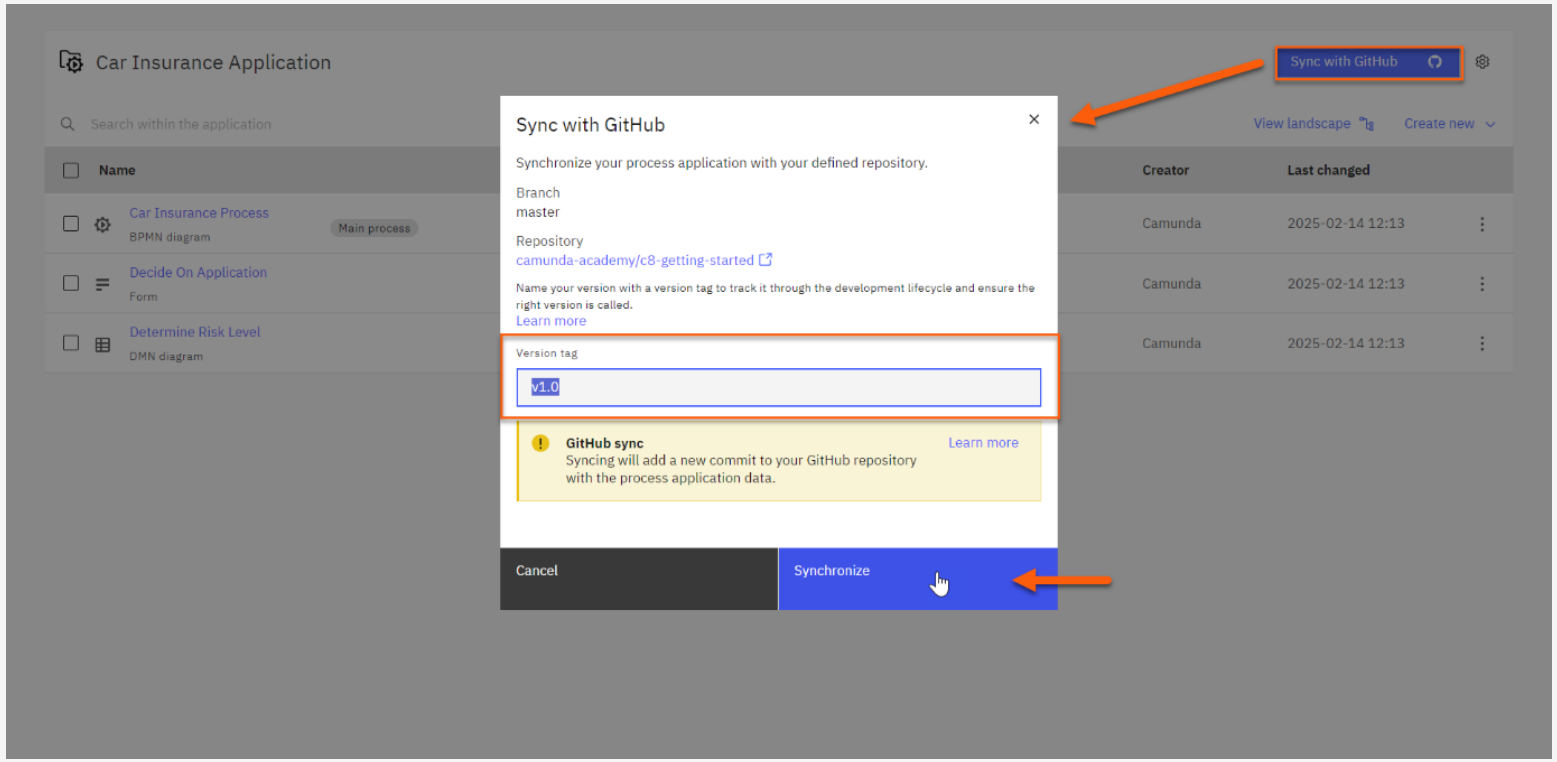


Close the modal window to update the content

Synchronize

When you make changes to your Process application components in Camunda Web Modeler, you can push these changes to the connected GitHub repository.

Just click **Sync with GitHub**, provide a **version tag**, and click **Synchronize** to push the changes to GitHub.



Synchronize

If changes have been made to the Process application components in the GitHub repository (e.g., by another team member), you can pull these changes into Camunda Web Modeler using the same approach.

Pull and Push commands are both executed while synchronizing

This will update your local copy of the process models with the latest changes from GitHub.

Conflicts resolution

If there are conflicts between the changes made in Camunda Web Modeler and the changes in the GitHub repository, you will need to resolve these conflicts.

The tool provides a conflict resolution interface where you can choose which changes to keep.

Browse blueprints

The 🔗 Camunda Marketplace is a platform where you can discover and leverage various **contributions** from the **Camunda community, trusted partners, and the Camunda team**.

It offers a wide range of resources, including **Connectors** and **blueprints**, which can be used to enhance your process modeling and automation projects.

In this lesson, you will be focusing on **blueprints**.

Blueprints are **pre-defined templates for BPMN, DMN, and Form** files that can be used as **starting points** for your projects.

You can filter blueprints by use case, industry, creator, or supported Camunda version.

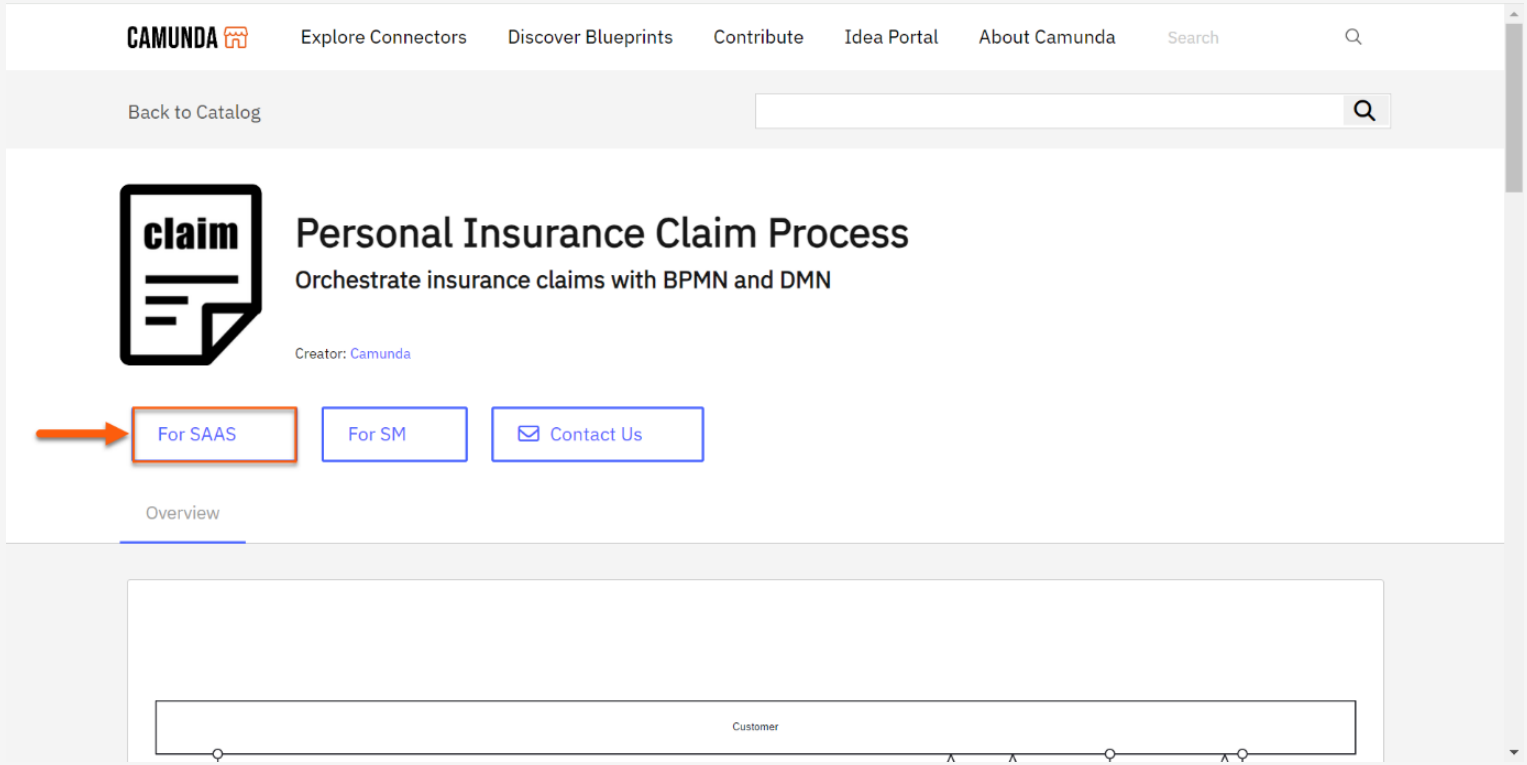
Once you find a desired blueprint, you can click "Use blueprint" to open it in the Web Modeler and start your work.

Add Blueprints from the Camunda Marketplace

Browse to 🔗 Personal Insurance Claim Process under the **Insurance** Industry, **Solution Accelerators** Category.

The blueprint displays the **process application** details and let you download it to your Web Modeler.

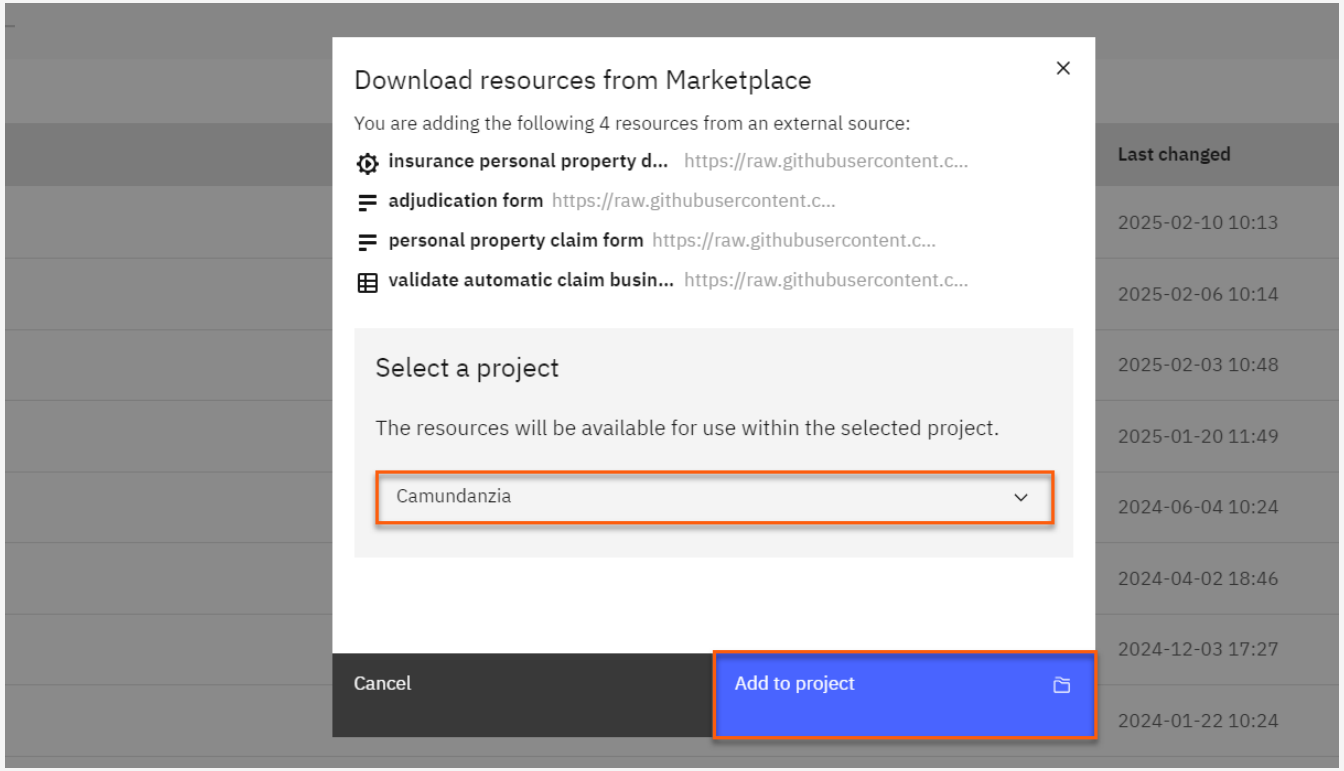
Click **For SAAS**



Add Blueprints from the Camunda Marketplace

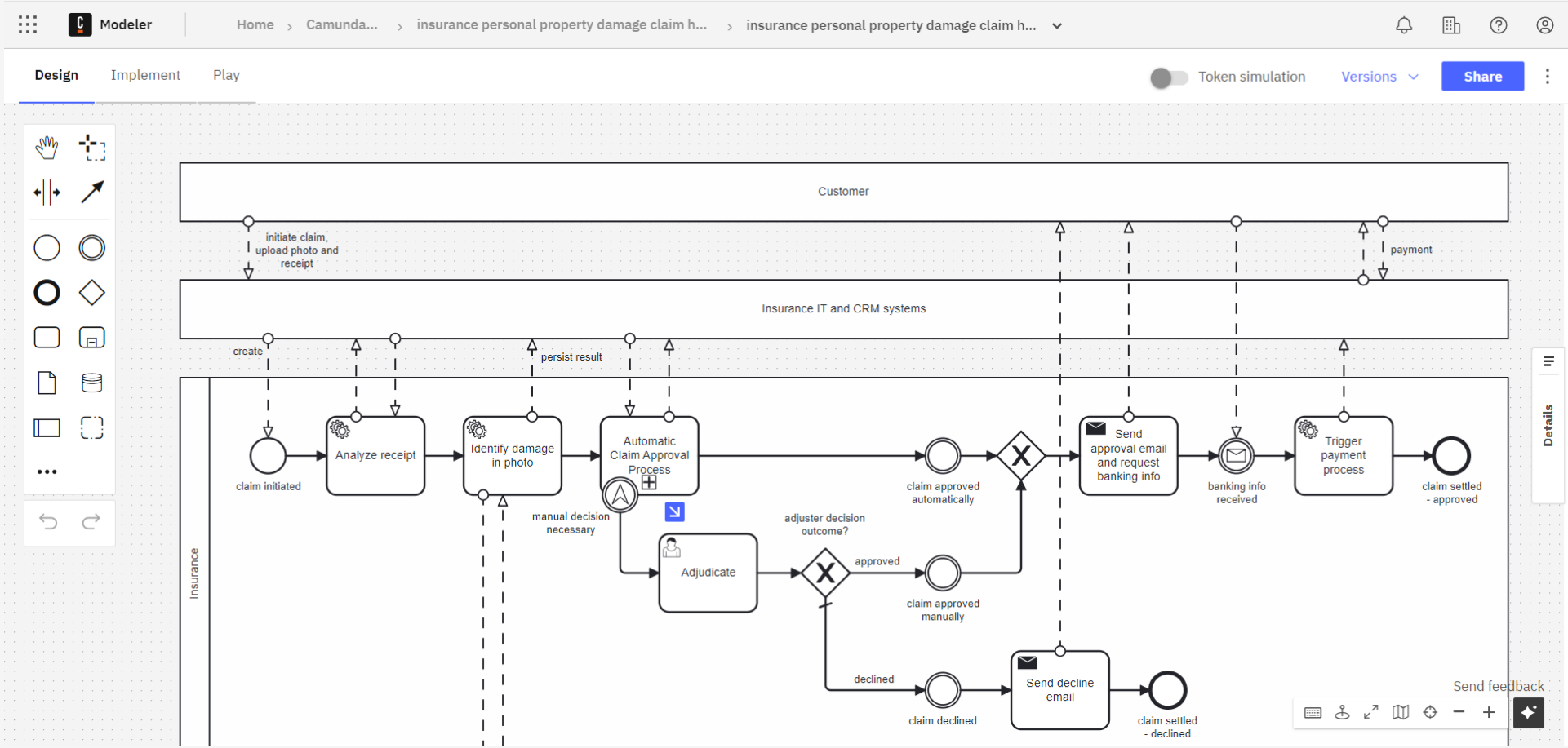
A pop-up window is displayed in your Web Modeler. It shows the list of resources that will be downloaded.

- Select your **Camundanzia** project
- Click **Add to project**



Add Blueprints from the Camunda Marketplace

A new **Process application** folder is created and the **main** BPMN diagram is opened.



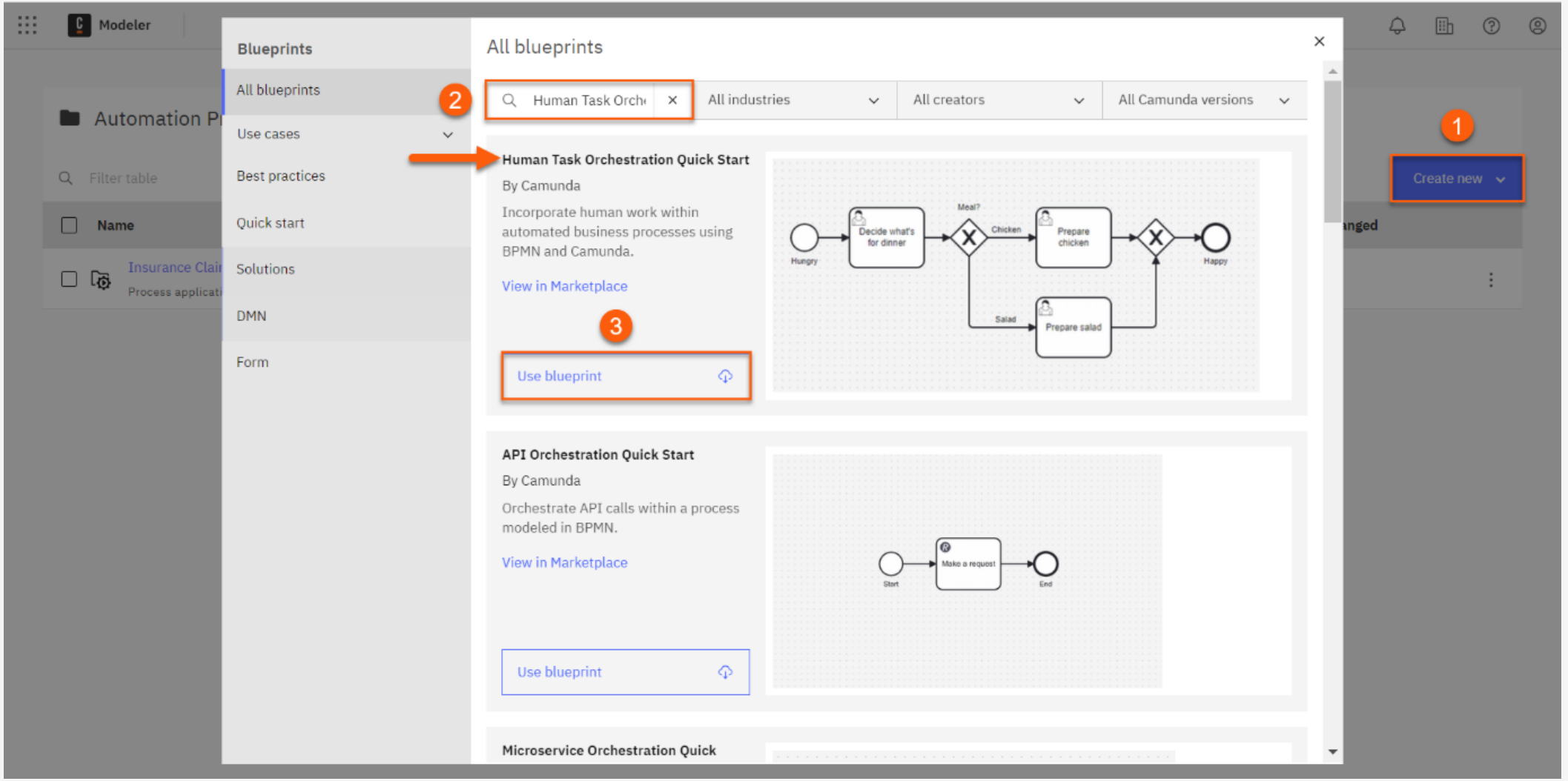
Add Blueprints from the Camunda Web Modeler

The "Browse blueprints" feature is particularly useful for **initiating projects with pre-defined structures**, saving time and providing a solid foundation for your modeling work.

You can access the Camunda Marketplace directly from the Web Modeler and follow similar steps to download a blueprint.

1. Click **Create new** > **Browse blueprints** under the **Automation Projects** folder
2. Use the search bar to find the **Human Task Orchestration Quick Start** blueprint
3. Click **Use blueprint**

Add Blueprints from the Camunda Web Modeler



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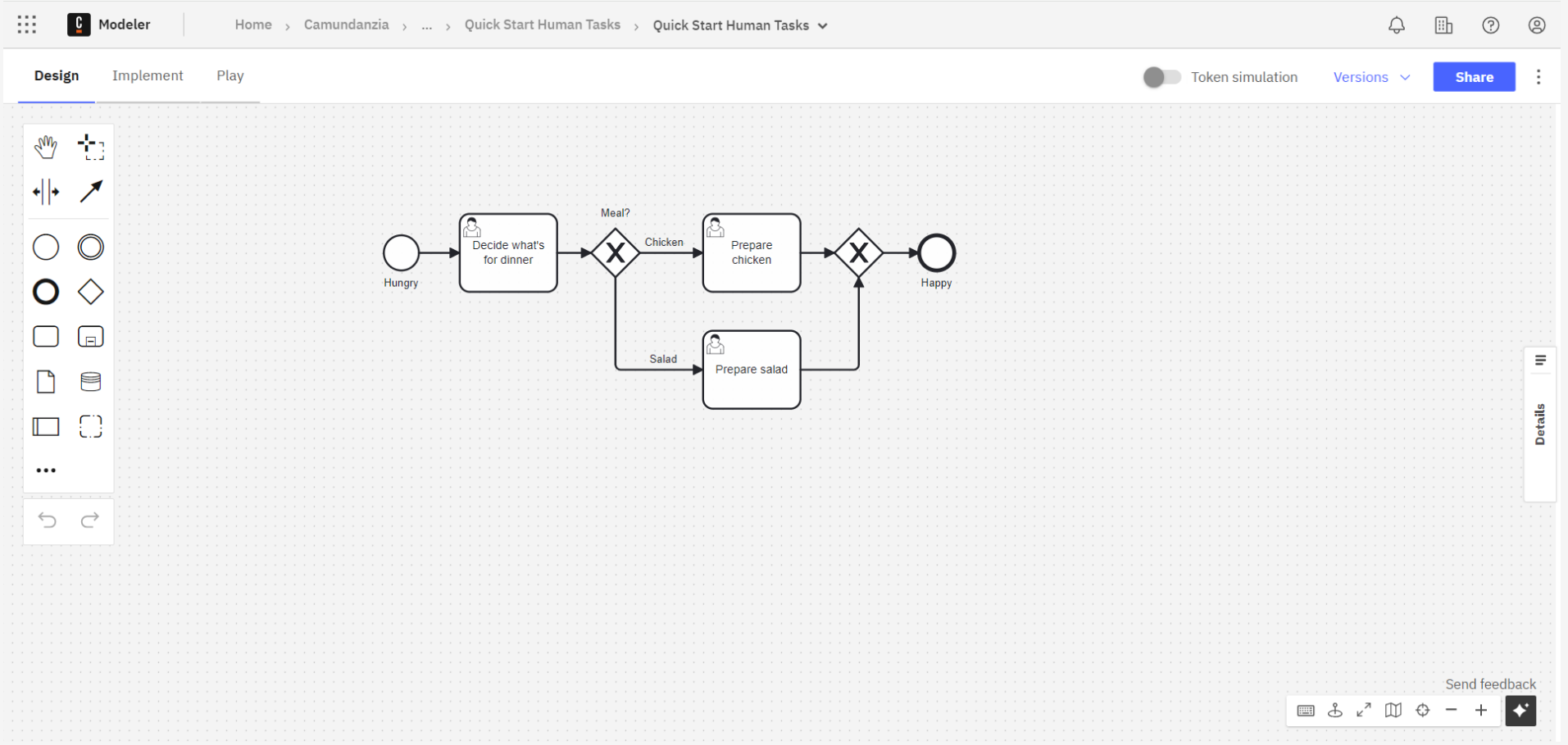


Contribution

You can 🔗 contribute your own **connectors** or **blueprints** to the Camunda Marketplace.

This allows you to share your integrations with the global Camunda community, collect feedback, and collaborate with other developers.

Also you can **submit your ideas** and **check what's planned** in the 🔗 Camunda Marketplace Idea Portal.

Model

Modes

Web Modeler Modes in Camunda

The Web Modeler in Camunda offers three distinct modes: Design, Implement, and Play.

Each mode is tailored to different stages of process development and caters to users with varying technical backgrounds.

Design Mode

Purpose: This mode is designed for **business users**.

It provides a simplified workspace with a reduced properties panel, showing only the documentation property and comments.

This decluttered interface allows business users to focus on modeling processes without dealing with technical complexities.

Features: Users can link decision models and process models via call activities.

The sidebar on the right-hand side is collapsed by default but can be expanded.

Linting is disabled, and problem annotations are discarded to avoid distractions.

Implement Mode

Purpose: This mode is intended for **developers**.

It provides all the necessary tools to define properties in the BPMN diagram, including helpful warnings to ensure smooth process deployments.

Features: Developers can hard-code example payloads in the task or event's Example data section in the properties panel.

This mode allows for detailed configuration of service tasks, connectors, and other technical elements.

Play Mode

Purpose: Play mode is a Zeebe-powered playground environment within Web Modeler for validating a process at any stage of development.

It is designed for **rapid validation and debugging**.

Features: Users can start a process by clicking the play button on a start event.

Play mode executes all logic of the process and its linked files, such as FEEL, forms, DMN tables, and outbound connectors.

It allows developers to debug their process logic, testers to manually test the process, and process owners to demo to stakeholders.

Play mode saves user inputs when completing user task forms and auto-fills the last response if the same form is opened later in the session.

It also provides options to reset the form to its defaults.

Create a new BPMN diagram

You can use the **Camunda Copilot** for assistance generating new BPMN process diagrams in Web Modeler based on a process description, using natural language prompts.

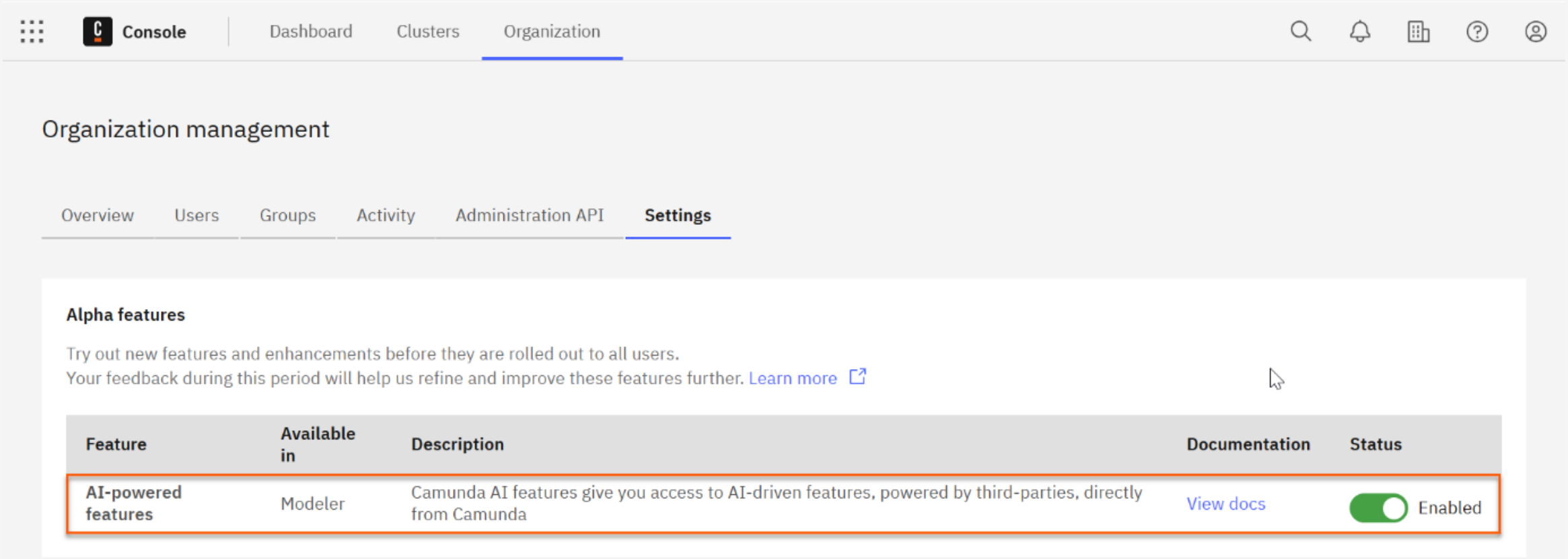
During this lesson you will explore different uses that could help you start a process.

Camunda Copilot access

Opt-In: Browse to **Console > Organization > Settings** and ensure that you have opted in to use this feature.

You can **disable the AI-powered features** from **Console > Organization > Settings**

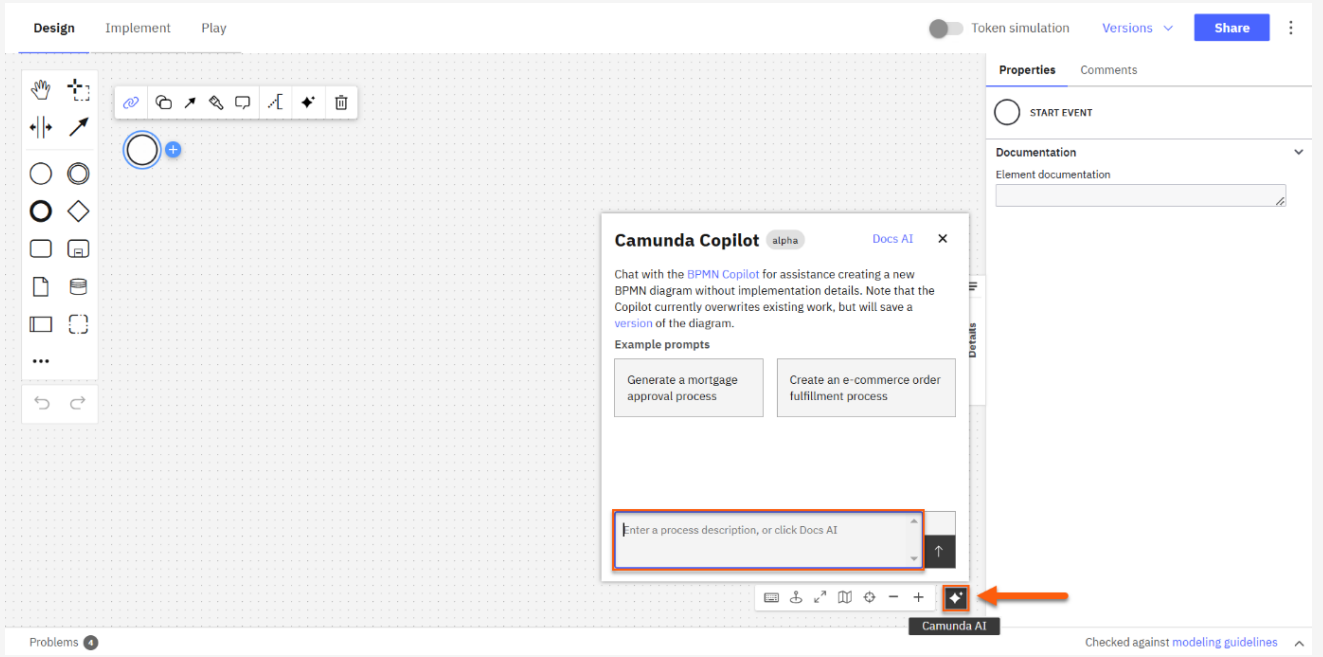
Create a new BPMN diagram



Create a new BPMN diagram

1. **Create a new project**: From your Camundanzia project, click **Create new > BPMN diagram**
2. **Click the Camunda AI** button to open the Camunda Copilot chat window, at the bottom-right corner of the BPMN diagram

Use the chat window: Enter a clear and concise prompt describing the BPMN diagram you wish to generate (e.g., "Generate a mortgage loan process diagram")



Limitations

The **Camunda Copilot is an Alpha feature**, and **does not support**:

- Modifying existing diagrams
- Pools, lanes, and collaborations.

Use cases

Overwrite

Creating a BPMN process diagram with the Camunda Copilot will **overwrite** existing work.

Different results

AI-powered features do not always create the same result from the same prompts.

The results we provide below are just an example.

Create a BPMN diagram from a log file

Prompt:

2025-02-21 09:00:01, User A logs into the system

2025-02-21 09:02:15, Order \#1234 created by User A

2025-02-21 09:05:20, Payment for Order \#1234 processed by User A

2025-02-21 09:10:45, Order \#1234 approved by Manager B

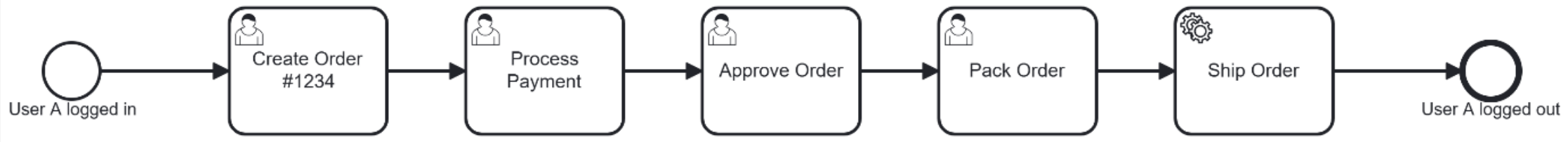
2025-02-21 09:15:30, Order \#1234 packed by Warehouse Staff C

2025-02-21 09:20:10, Order \#1234 shipped by Delivery Service D

2025-02-21 09:25:05, User A logs out of the system

Create a BPMN diagram from a log file

Result:



Create a BPMN diagram from a process documentation

Prompt:

Process Name: Purchase Order Approval Process

1. Employee initiates a purchase order (PO) request.

2. Department head reviews PO request:

- If approved, proceed to Step 3.

- If denied, send rejection notice to the employee.

3. Procurement reviews the PO:

- If approved and within budget, proceed to Step 4.

- If approved but over budget, escalate to Finance for additional approval.

- If discrepancies or issues, send back to the employee for correction.

Create a BPMN diagram from a process documentation

4. Finance reviews the PO (if escalated):

- If approved, proceed to Step 5.

- If denied, send back to the employee.

5. PO is finalized and purchase order is sent to the supplier.

6. Supplier acknowledges the PO:

- If acknowledged, proceed to Step 7.

- If issues, send notification to the procurement team.

7. Goods are received and inspected by the warehouse.

8. Invoice is received and matched against the PO and Goods Receipt Note (GRN).

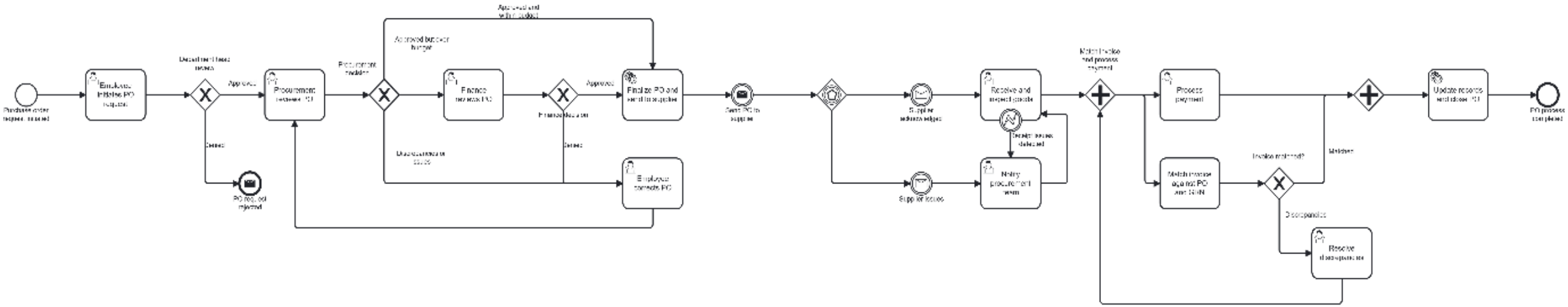
- If matched, process the payment.

- If discrepancies, resolve the issues with procurement and supplier.

9. Update records and close the PO.

Create a BPMN diagram from a process documentation

Result:



Create a BPMN diagram from common process

Prompt:

Submission of Requests:

- Employees must be able to submit their annual leave requests.
- The requests should be submitted to the employee’s Line Manager for review.

Review and Decision Making:

- Line Managers must be able to review the submitted annual leave requests.
- They should have the ability to approve, reject, or ask for more details on a request.

Create a BPMN diagram from common process

Prompt:

Additional Information and Resubmission:

- Employees should be able to provide additional information if requested and resubmit their leave requests.

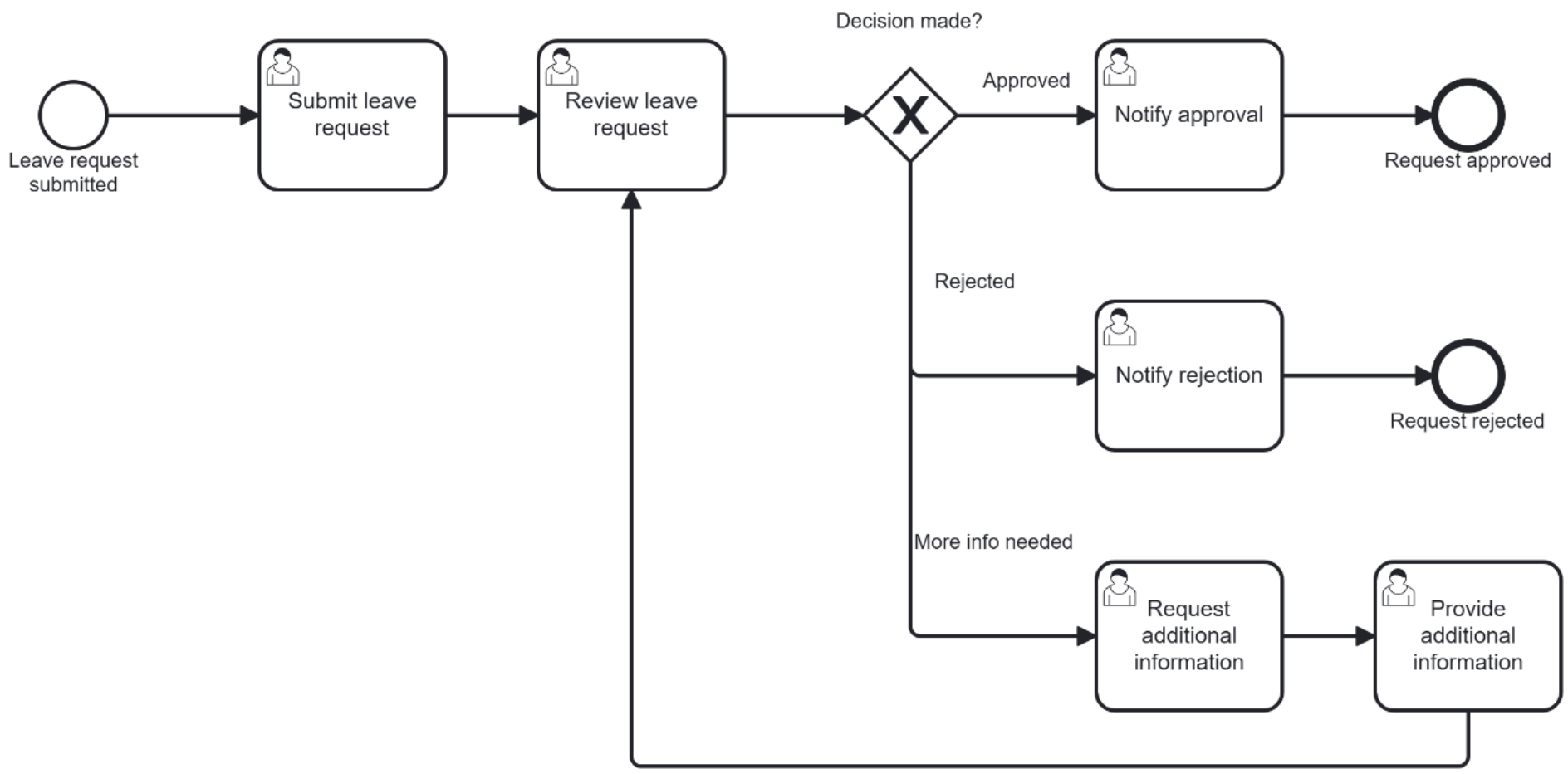
- Line Managers should be able to review the additional information before making a final decision.

Notification and Communication:

- Employees must receive an official response to their leave request, whether approved or rejected, with justification if necessary.

Create a BPMN diagram from common process

Result:



Create a BPMN process from the information gathered from interviews and workshops

Prompt:

Information Gathered from Interviews and Workshops

Participants:

- Customer Service Representatives (CSRs)
- Team Leads
- Quality Assurance (QA) Team
- Product Managers
- Legal Team
- IT Support Team

Create a BPMN process from the information gathered from interviews and workshops

Prompt:

Process Insights:

- Customer files a complaint via a contact form or customer service hotline.

CSR reviews the complaint and categorizes it:

- If categorized as high-priority, proceed to Step 3.
- If categorized as low-priority, proceed to Step 4.

Team Lead reviews high-priority complaints:

- If valid, escalate to the QA Team.
- If invalid, send rejection notice to the customer.

Create a BPMN process from the information gathered from interviews and workshops

Prompt:

CSR resolves low-priority complaints:

- If resolved, send resolution notice to the customer and close the case.

- If not resolved, forward to the appropriate department (Product Management or IT Support) and notify the customer.

QA Team investigates high-priority complaints:

- If actionable, implement corrective measures and escalate to the Product Manager.

- If not actionable, document findings and close the case.

Create a BPMN process from the information gathered from interviews and workshops

Prompt:

Product Manager reviews corrective measures:

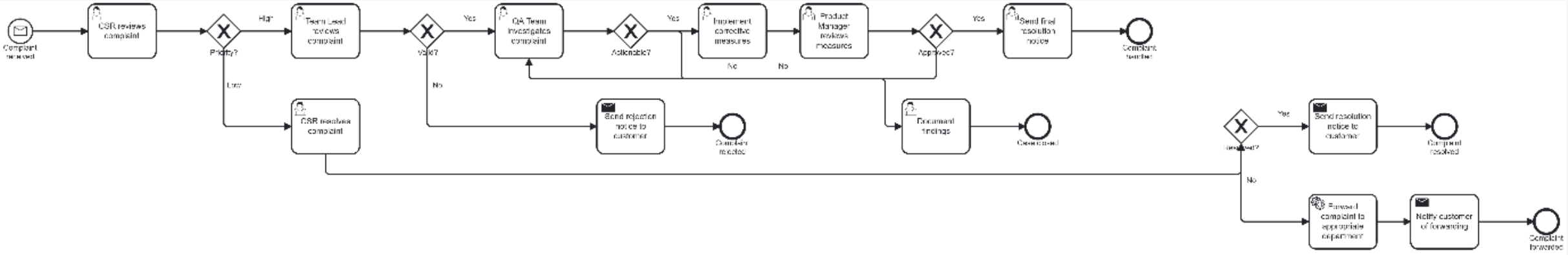
- If approved, proceed to Step 7.
- If further changes are needed, send back to QA Team for revision.
- IT Support assists in technical resolutions, if required.

Legal Team gets involved if there are potential legal implications:

- Review complaint and advise on further actions.
- CSR or Team Lead sends final resolution notice to customer and updates the CRM system.
- Periodically review closed complaints for process improvement and reporting purposes.

Create a BPMN process from the information gathered from interviews and workshops

Result:



Create a BPMN process from a summary Generated by Zoom AI Assistant

Prompt:

Workshop Summary: "Improving Customer Experience"

Date: February 21, 2025

Duration: 2 hours

Attendees: John Doe, Jane Smith, Michael Brown, Emily Clark

1. Introduction:

   Speaker: John Doe

   Overview of current customer experience challenges.

   Objective of the workshop: Identify actionable strategies to enhance customer satisfaction.

Create a BPMN process from a summary Generated by Zoom AI Assistant

Prompt:

2. Current Challenges:

Speaker: Jane Smith

Feedback from customer surveys indicating issues with response times and product usability.

Common themes: Slow technical support and complicated process for returns.

3. Brainstorming Solutions:

Led by: Michael Brown

Idea 1: Implement a chatbot for 24/7 customer support.

Support: John Doe, Emily Clark

Key Point: Can handle common inquiries and reduce wait times for support agents.

Create a BPMN process from a summary Generated by Zoom AI Assistant

Prompt:

3. Brainstorming Solutions:

   Idea 2: Streamline the return process with a simplified online form.

   Support: Jane Smith

   Key Point: Make it user-friendly and integrate with the inventory system.

4. Deciding on Actions:

   Decision: Proceed with the chatbot implementation.

   Assigned to: IT Support Team

   Deadline: March 31, 2025

Create a BPMN process from a summary Generated by Zoom AI Assistant

Prompt:

4. Deciding on Actions:

Decision: Revamp online return form.

Assigned to: Product Management Team

Deadline: April 15, 2025

5. Action Items:

Michael Brown: Research chatbot solutions from vendors and select the top 3 options by February 28, 2025.

Emily Clark: Draft a customer communication plan regarding the new return process changes by March 15, 2025.

Create a BPMN process from a summary Generated by Zoom AI Assistant

Prompt:

6. Questions and Responses:

Q: What metrics will we use to measure the success of these initiatives?

A: Customer satisfaction scores, reduction in support tickets, and feedback from follow-up surveys.

7. Closing Remarks:

Speaker: John Doe

Emphasized the importance of quick implementation and continuous evaluation.

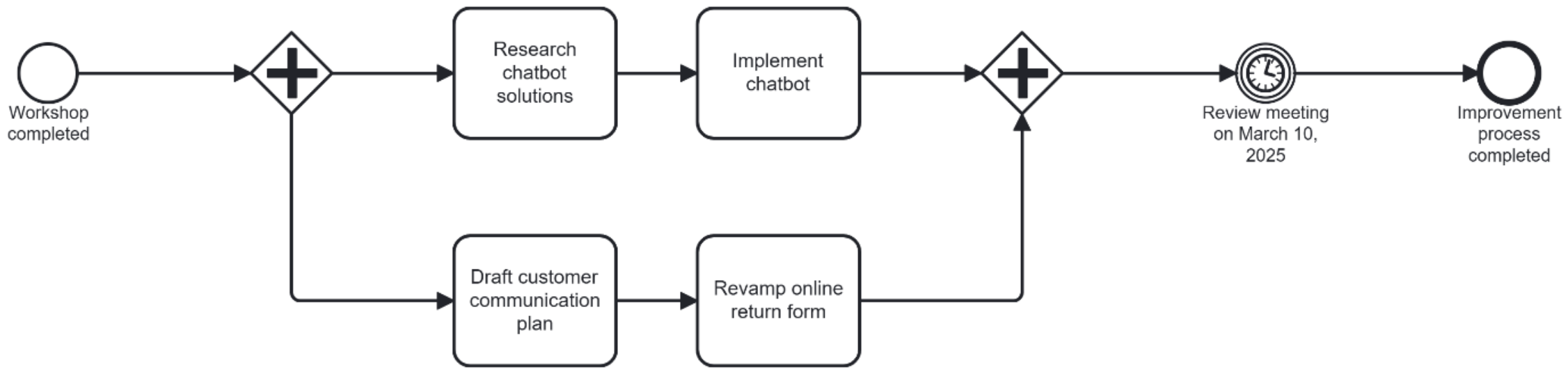
Next meeting scheduled for March 10, 2025, to review progress.

Generated by Zoom AI Assistant

Note: Action items will be added to the team's Trello board for tracking.

Create a BPMN process from a summary Generated by Zoom AI Assistant

Result:

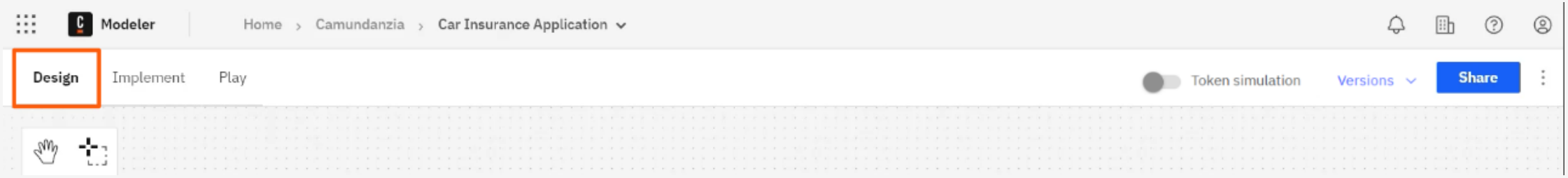


Simulate a process instance

You will now use the **Token Simulation** feature to validate the process that you modeled.

Simulate a process

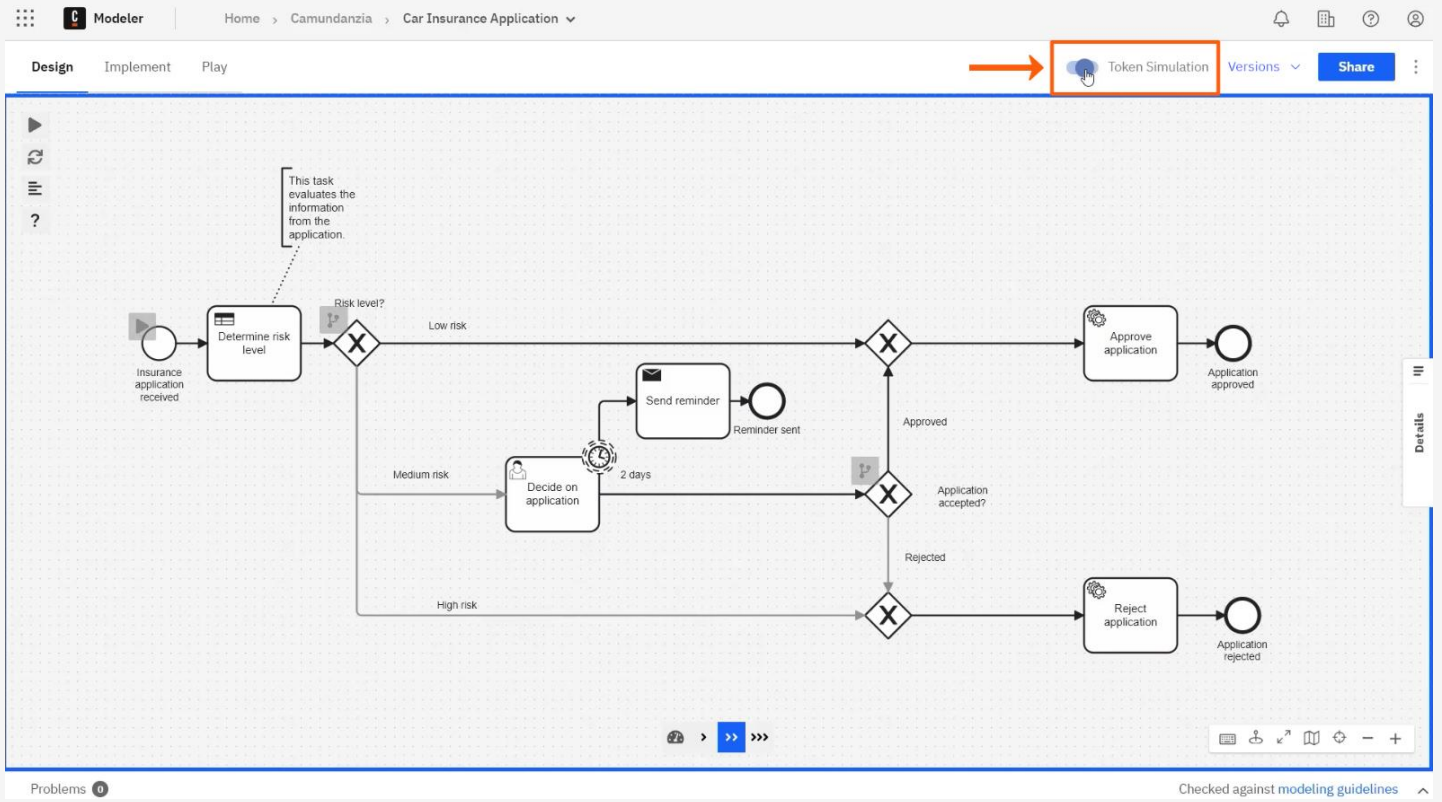
Make sure you are on the Design tab by checking your location at the top left corner of the screen.



Simulate a process instance

Validate that your process works by following the steps below:

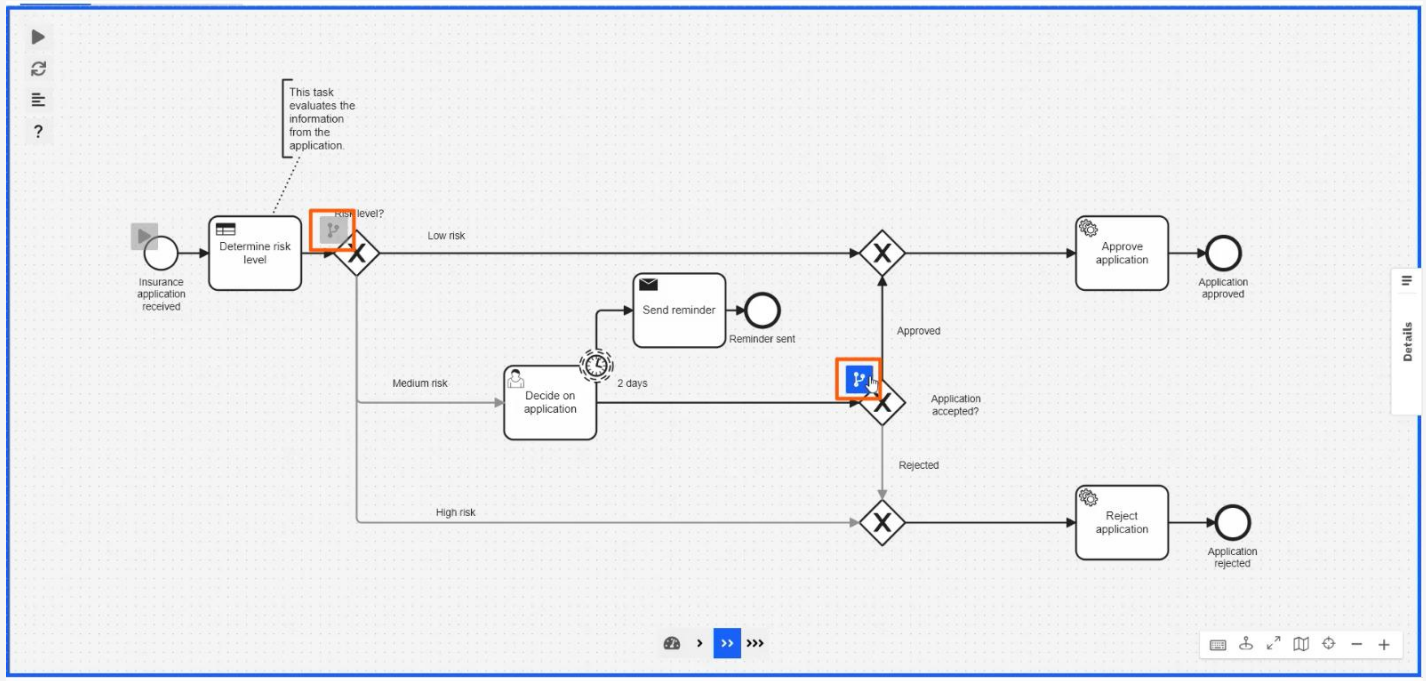
1. Click the **Token Simulator** toggle in the top right corner of the screen. Notice that the process is now outlined in blue.



Simulate a process instance

Validate that your process works by following the steps below:

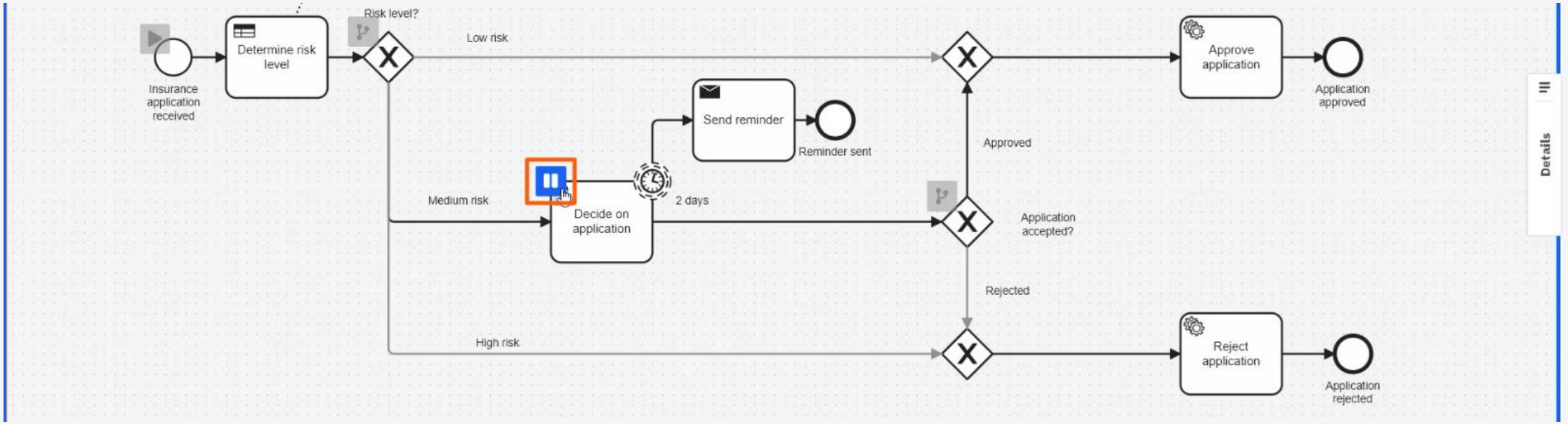
2. Notice the **Set sequence flow** icons near the XOR gateways. Clicking these will change the path the token takes through the process. Notice how the *Low risk*, *Medium risk*, and sequence *High risk* flows change from enabled (Black) to disabled (Grey) each time you click the icon. Start a simulation by clicking the **Start (play)** button at the left, and see how the token moves through the process differently, based on different criteria.



Simulate a process instance

Validate that your process works by following the steps below:

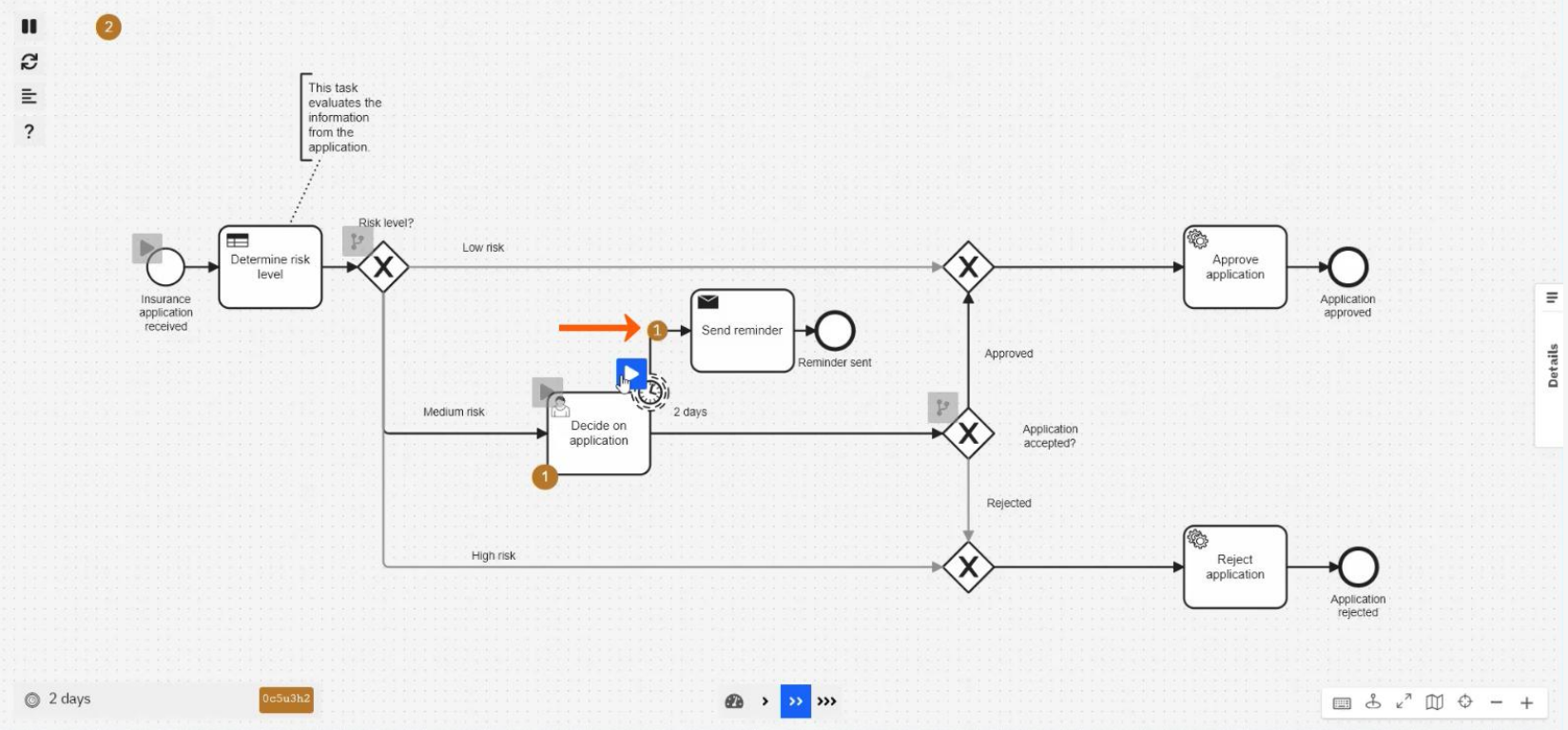
3. Test that the timer event works as expected. Hover over the *Decide on application* task. A pause button will appear. Click it. This will cause the token to pause at this task, simulating a user task being actively worked on.



Simulate a process instance

Validate that your process works by following the steps below:

4. Now, start the simulation again. After the token has paused at the *Decide on application* task, click the play button near the timer event to simulate it being triggered.



Try different simulation settings

Play around with each of the simulation settings.

- At the bottom middle of the screen you can use the arrows to change the speed of the token movement.
- At the top left of the screen:
  - The **Reset simulation** button clears any current tokens and reset back to the start state.
  - The **Toggle simulation log** opens/closes the simulation log.
  - **Info** button links you to the Camunda documentation for Token Simulation.

Deploy

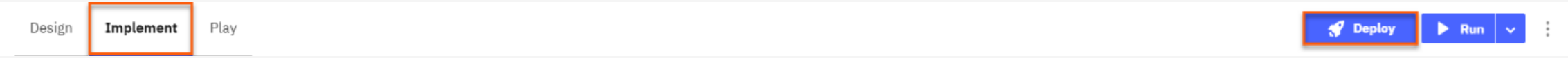
Deploy a process application

In the Web Modeler **Implement Mode** , the **deploy** and **run** buttons serve distinct purposes specifically helpful for different stages and roles in the process development lifecycle.

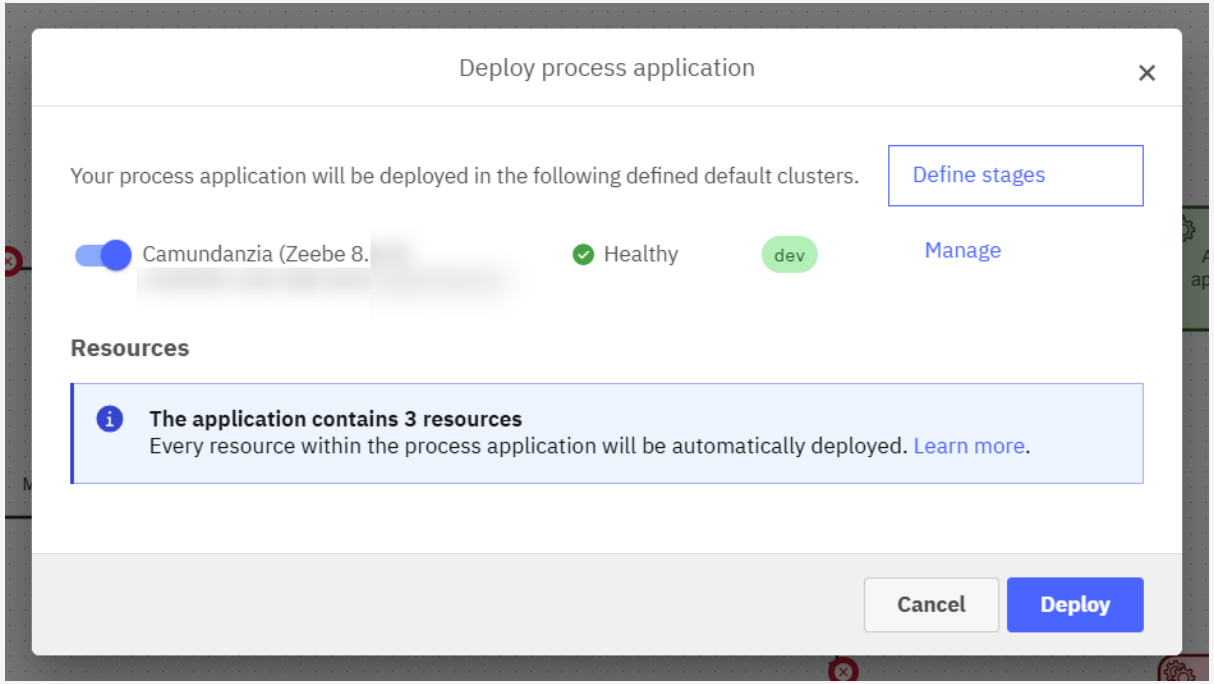
For a **business analyst**, while they might not directly use the **deploy** function, understanding its outcomes and verifying the process runs as expected using the **run** button would be key parts of their role.

Deploy

Think of the Deploy button as a key that takes your carefully crafted process designs and makes them come to life.



When you press the **Deploy** button, you're essentially publishing or uploading your process, along with its necessary components like DMN (Decision Model and Notation) diagrams and forms, onto a **selected cluster** (which is a collection of servers running the relevant components of Camunda).



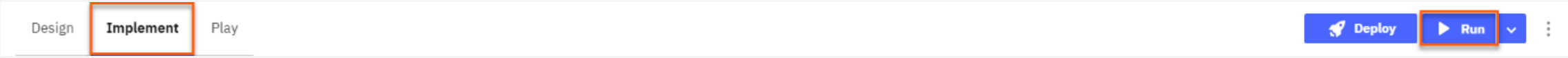
Deploy

This means your process is now ready to be used, tested, or even showcased in a real-world scenario.

However, this privilege is generally reserved for those with higher access levels, such as admins and organization owners, who ensure the deployment is smooth and without errors.

Run

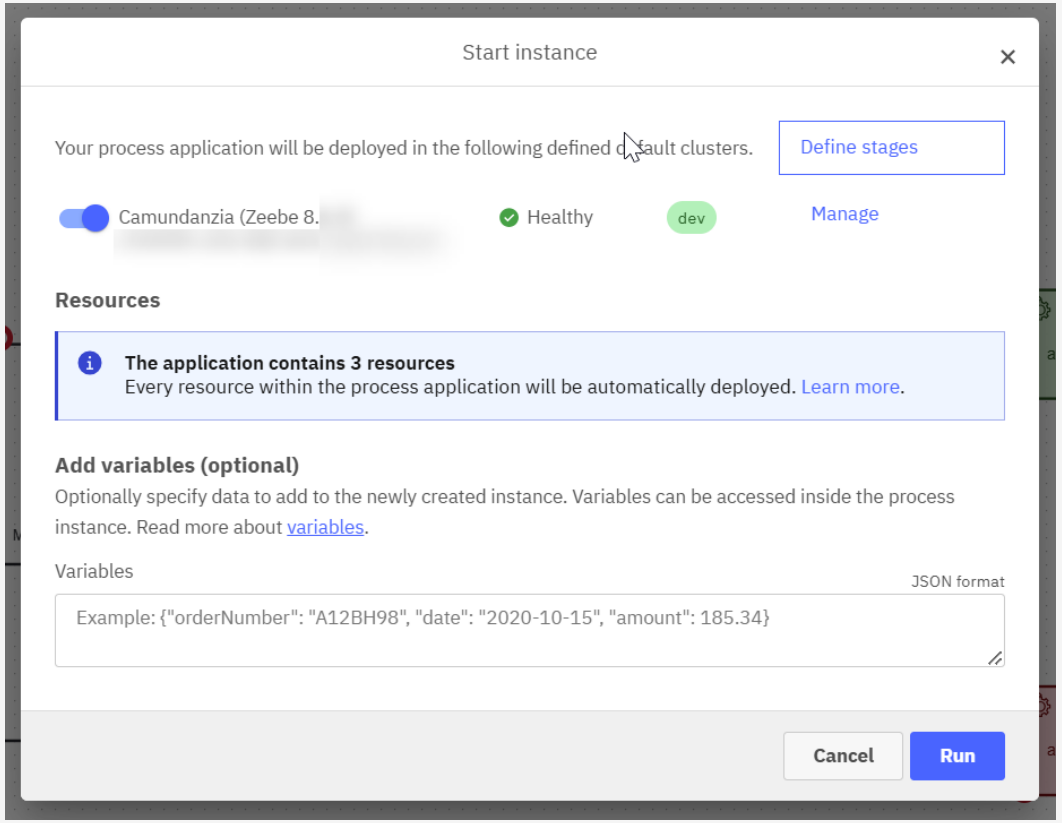
Once your process is deployed and ready, the Run button is what you use to start an instance of the process.



Run

Imagine a playwright who, after preparing an entire play, finally sees it come alive on stage – that's what the Run button accomplishes.

It initiates the process in the selected cluster, and you can interact with the process instances.



Run

This operation allows you to input startup variables, monitor the process execution, and ensure everything flows as planned.

Tools like **Camunda Operate** and **Tasklist** become indispensable at this stage, helping you observe and manage the life cycle of your process instances.

In essence, while **Deploy** is about setting up and making your process available, **Run** is about starting and experiencing the process in action.

These two buttons together form the backbone of executing your process automation tasks in Camunda.

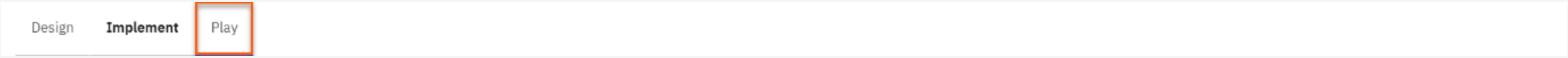
Validate

Using Play

Play mode is designed as a sandbox environment, allowing users to validate their process models interactively.

This environment provides vital tools for debugging, testing, and showcasing processes without deploying them to a live environment.

Essentially, it enables users to ensure that the process logic is functioning as intended before going live.



Play mode is beneficial for several scenarios such as validating process logic before deployment, demonstrating processes to stakeholders, and iterating on process designs swiftly by testing changes immediately.

It integrates well with other Camunda components like Operate for monitoring and debugging.

Version & Review

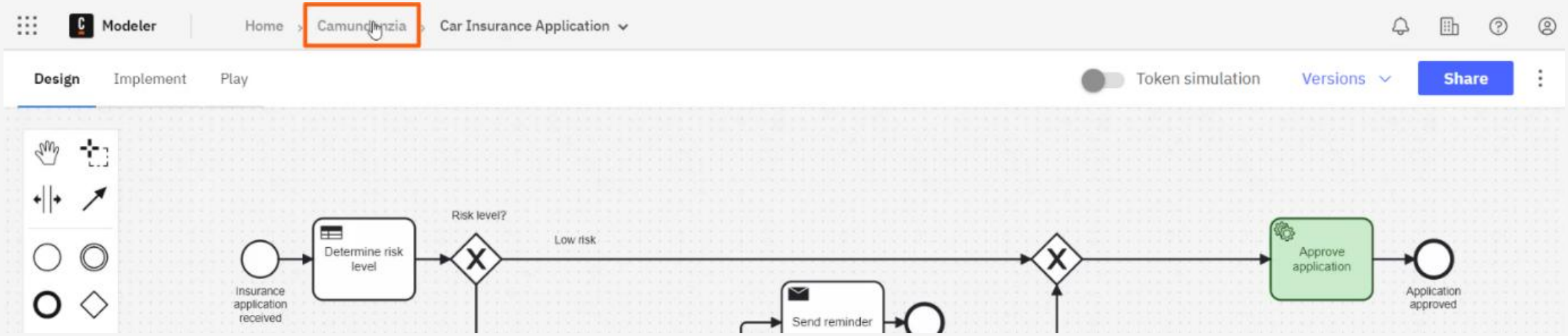
Use collaboration features

You will now learn how to add collaborators to your project, share and export your process definition, and use some of the collaboration and communication features in the Modeler, including **annotations**, **comments**, and **documentation**.

Learn how to add collaborators to the project

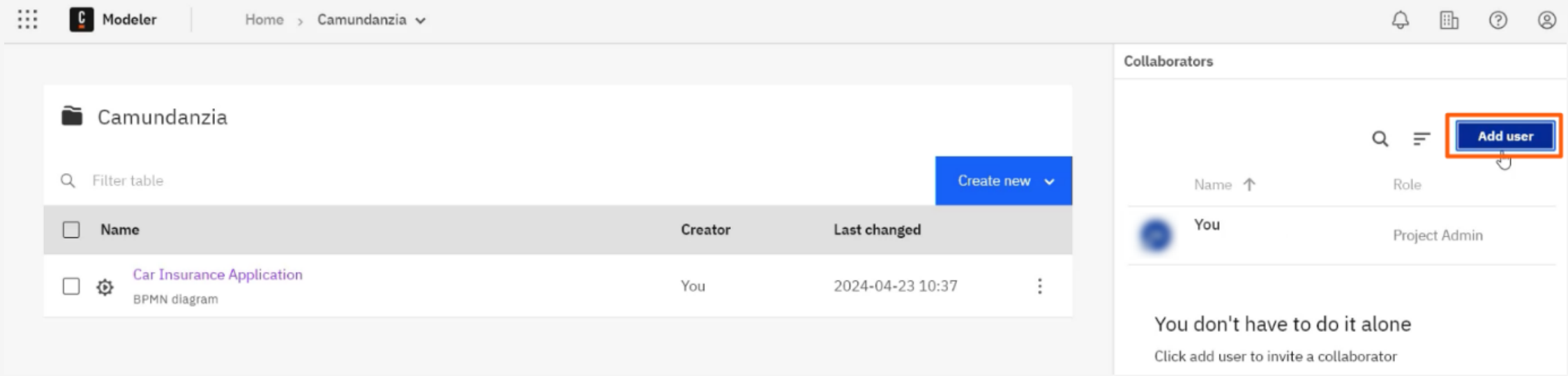
Familiarize yourself with the process for adding collaborators to your project.

Navigate back to the project view by clicking **Camundanzia** in the breadcrumb navigation at the top of the page.



Learn how to add collaborators to the project

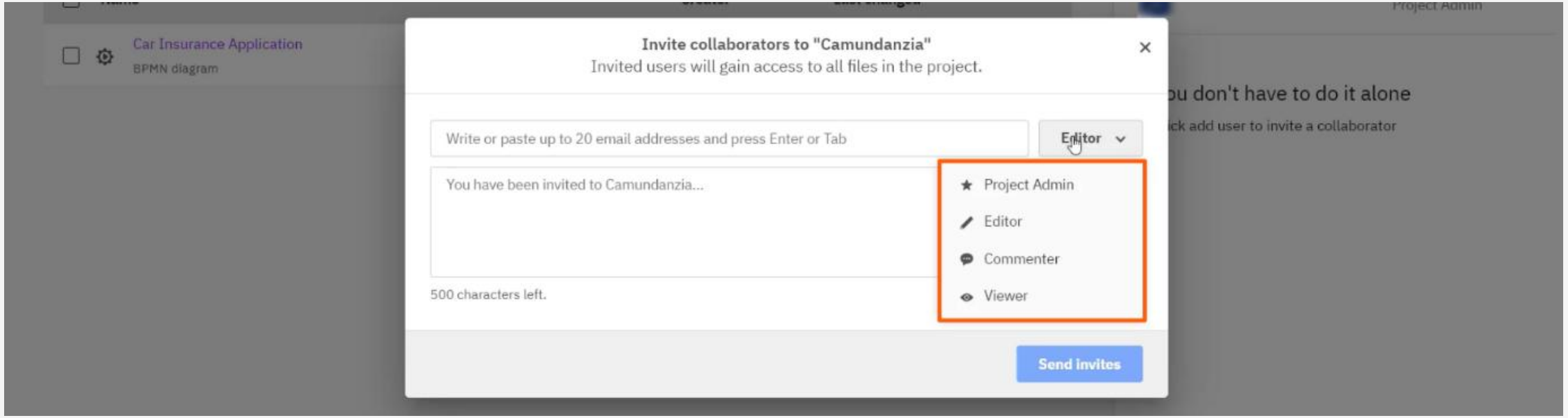
On the right side of the page, click **Collaborators** > **Add user**.



Learn how to add collaborators to the project

1. In the **Invite collaborators to Camundanzia** pop up that appears, notice the each of the following:
    - **Email field**: Enter up to 20 email addresses for the collaborators you'd like to add to your project. Recipients will receive an email with a link to the project.
    - **User permissions**: Choose what level of permissions you'd like the collaborators to have:
        - **Project Admin**: Allows making changes to the project and inviting others.
        - **Editor**: Allows adding new subfolders and diagrams, and editing existing process definitions.
        - **Commentor**: Only allows commenting on the process definitions.
        - **Viewer**: Only allows viewing the process definitions.
    - **Description field**: Enter an optional description about your project.
    - **Send invites button**: After entering the necessary user information, click this to invite collaborators.

Learn how to add collaborators to the project



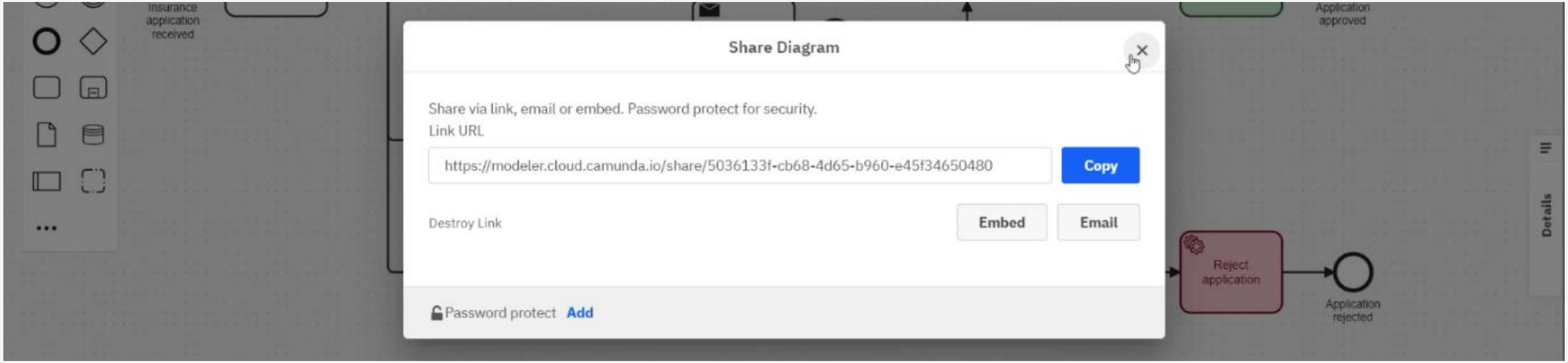
Adding collaborators

Learn how to share, download, and export the process definition

Familiarize yourself with the process for sharing, downloading, and exporting the process definition.

1. From the project view, click *Car Insurance Application* to return to the process definition.
2. In the top right corner, click the **Share** button. Then click **Create link**.
3. In the **Share diagram** pop up that appears, notice each of the following:
    - **Link URL**: A link to copy the process definition directly.
    - **Embed button**: Copies the embed code to your clipboard.
    - **Email button**: Opens an email prompt to share the diagram via email.

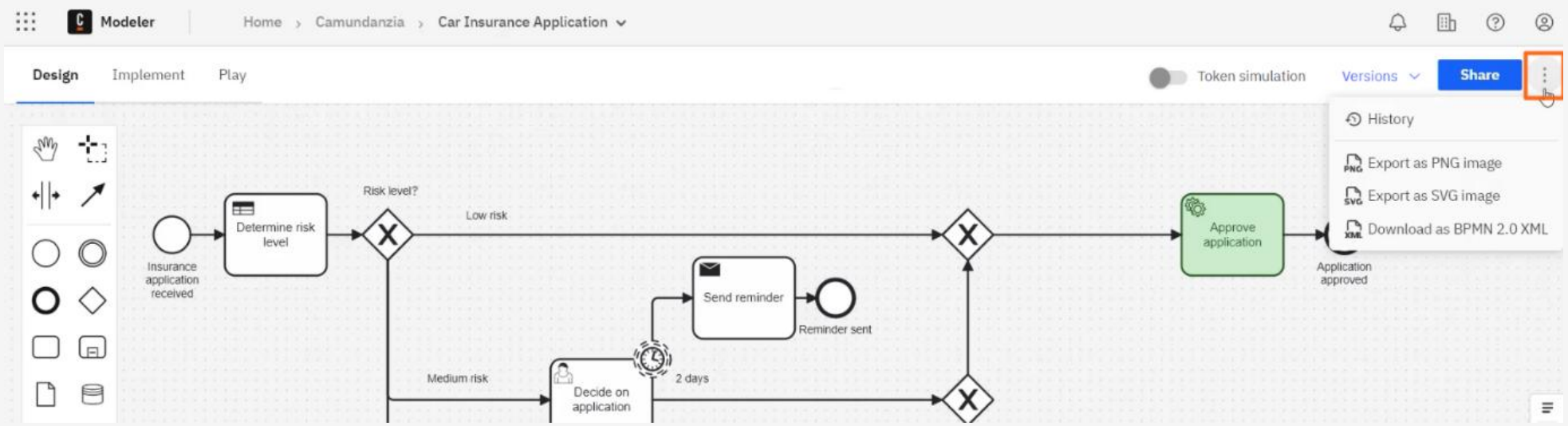
Adding collaborators



Adding collaborators

4. Close the prompt to return to the process diagram. Click on the three dots to the right of the share button and notice each of the following options:

- **Export as PNG**: Downloads a PNG of your diagram.
- **Export as SVG**: Downloads an SVG of your diagram.
- **Download as BPMN 2.0 XML**: Downloads the diagram XML. This can be re-uploaded to the Modeler, or any other BPMN tool.

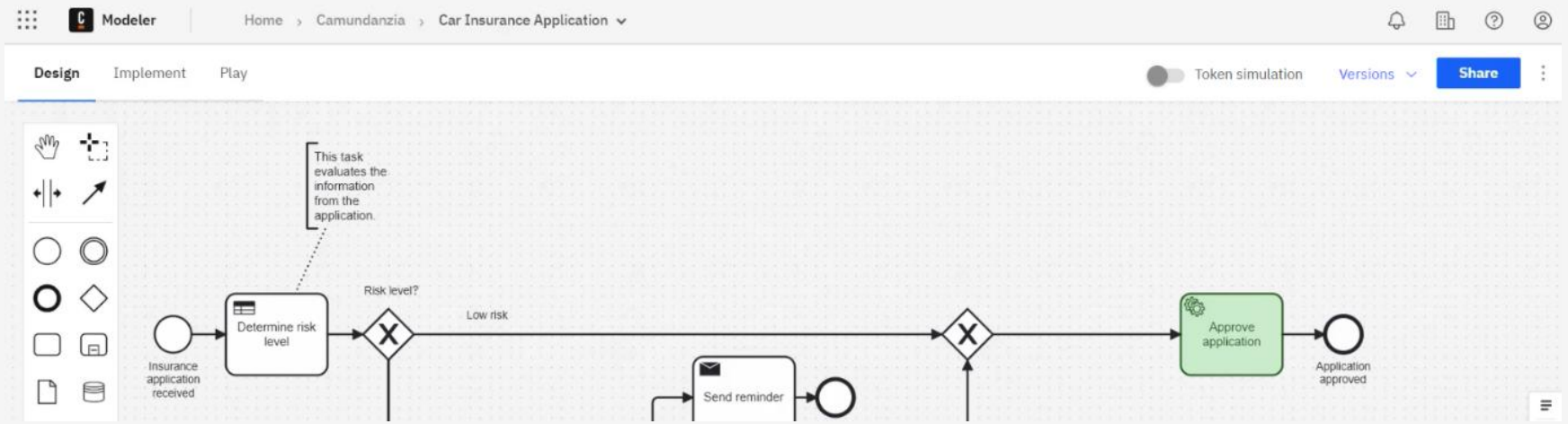


Sharing the process definition

Create an annotation

Annotations are like notes you can add to elements in your diagram to add additional context. Create an annotation by following the steps below:

1. Click the *Determine risk level* business rule task and then click the **Add text annotation** icon in the palette that appears.
2. Double-click into the text field and then update the text to: *This task evaluates the information from the application.*



Annotations

Annotations are a part of the BPMN 2.0 specification, so they become are a part of the process that you have modeled.

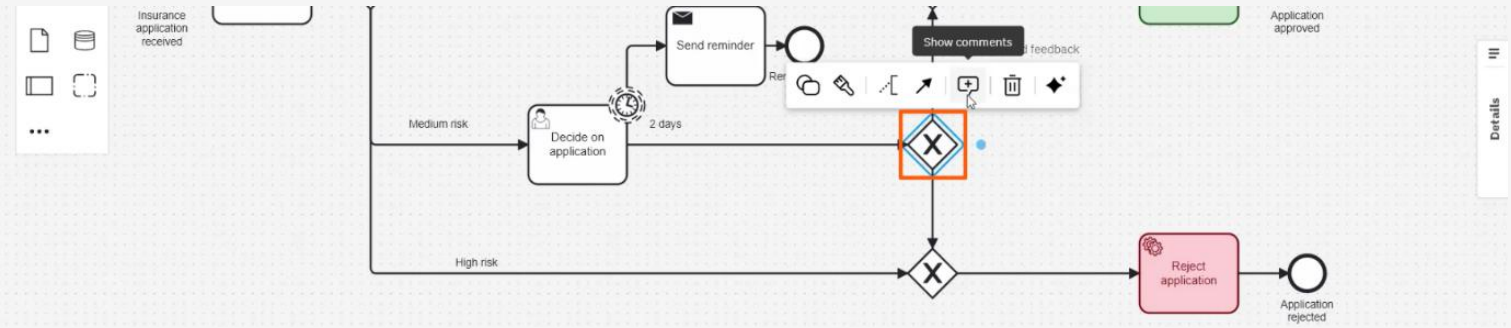
The annotation will be displayed in the model even if opened in a different (BPMN compliant) tool.

Add a comment

Comments can be used to communicate with collaborators directly in the process definition about specific parts of the diagram.

Create a new comment by following the steps below:

Click the **exclusive gateway** that follows the *Decide on application* task and then click the **Show comments** button from the palette that appears.



Annotations

The **Details** panel will open at the right, displaying all comments for that diagram element.

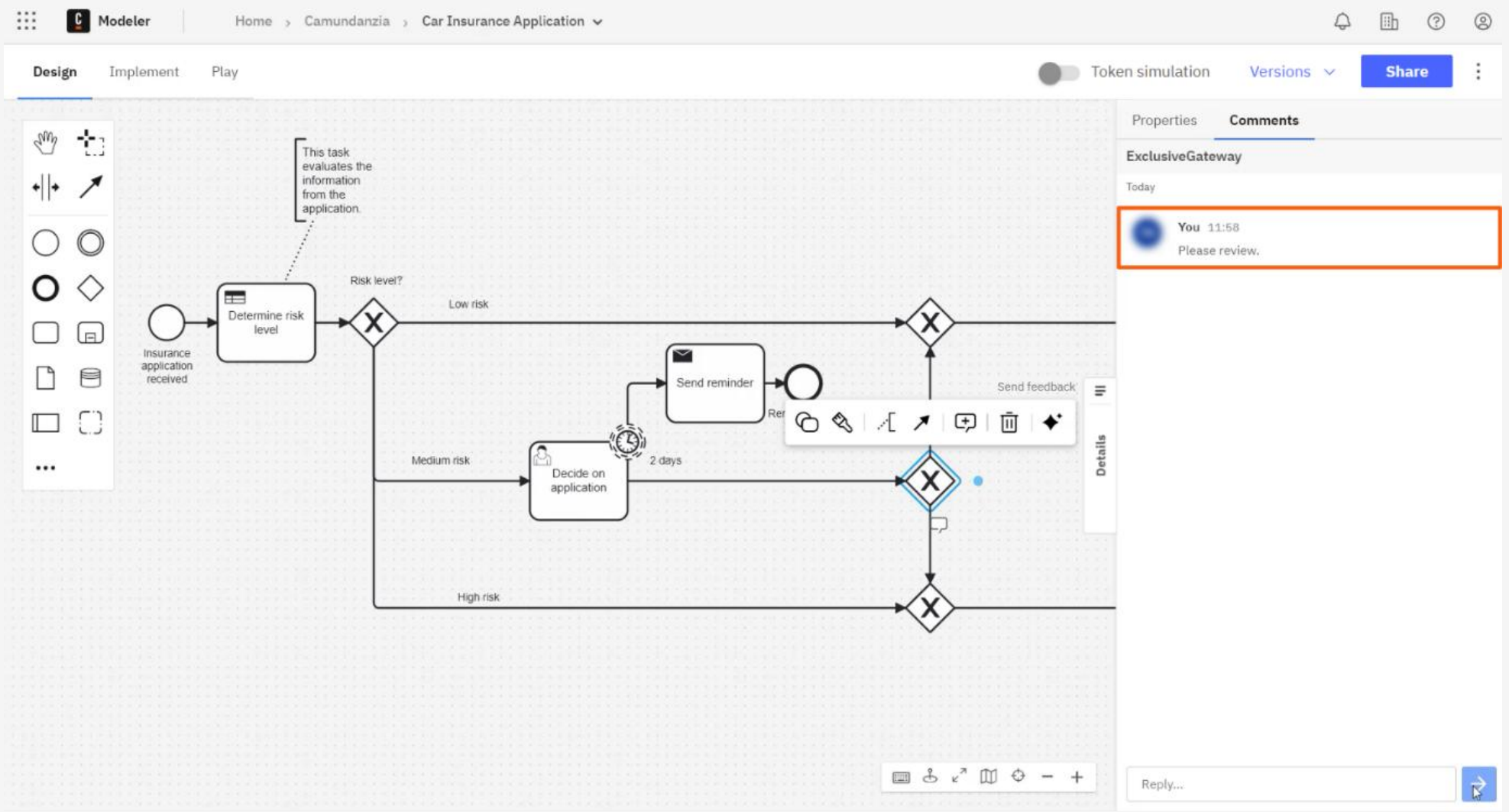
In the text field at the bottom, enter a comment: *Please review.*

Click the blue arrow button to save the comment.

You will now see the comment displayed at the top of the **Comments** panel.

To edit or delete the comment that was added, hover over the right of the comment and then click the three dots that appear.

Annotations



Annotations

A **comment icon** will also be shown beneath the exclusive gateway to indicate that a comment has been added.

Clicking this icon will toggle the **Comments** panel open or closed.

Comments

Comments are **NOT** a part of the BPMN 2.0 specification; they are a feature of Camunda.

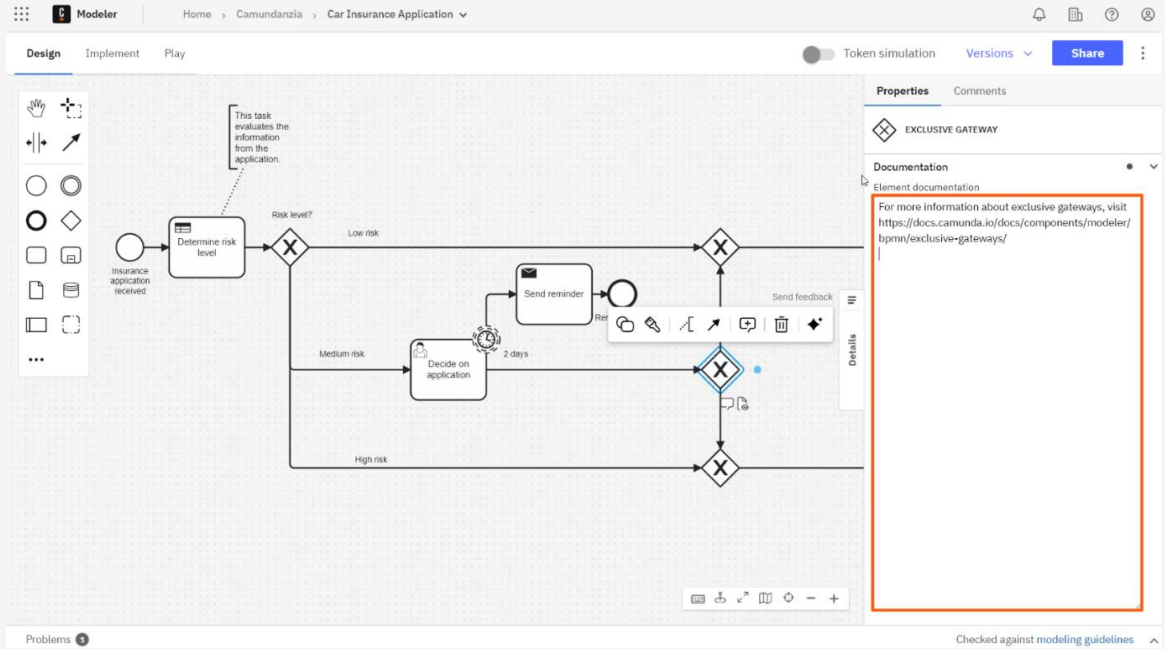
For that reason, they are not a part of the process definition and will not be included if you download the process as a BPMN 2.0 XML file.

Comments

Add documentation

Add additional information about your process definition by using the documentation field in the properties panel.

1. At the top of the **Details** panel, click the **Properties** tab.
2. In the documentation field, enter any additional information about your process definition that you like.



Manage versioning

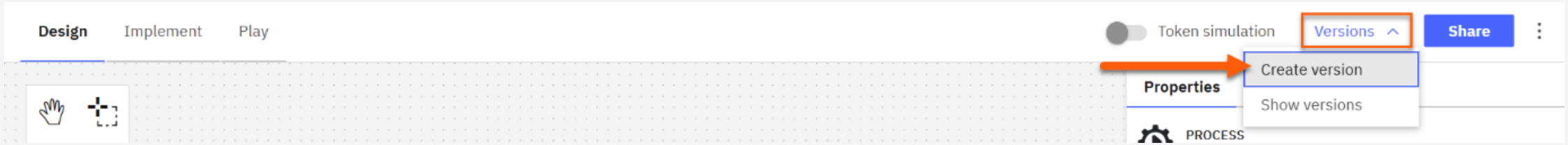
After sharing your process definition with collaborators, you received a comment with feedback to add missing sequence flow labels.

Before making changes to your process definition, save the current version by creating a new **version**.

Create a version

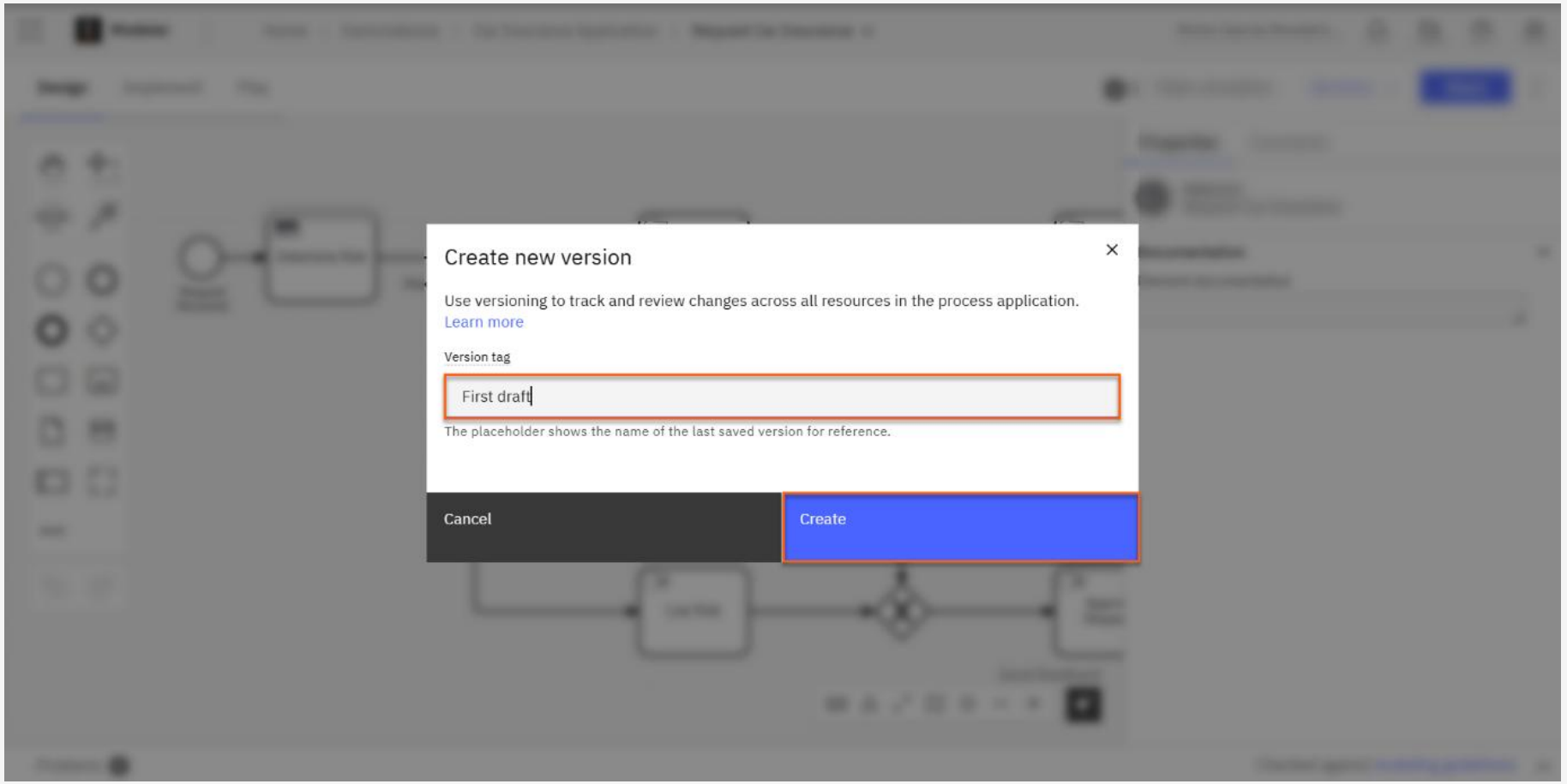
At the top right hand of the Modeler,

1. Click **Versions**, then **Create version**



Create a version

Name this version: *First draft*, and then click **Create** to save it



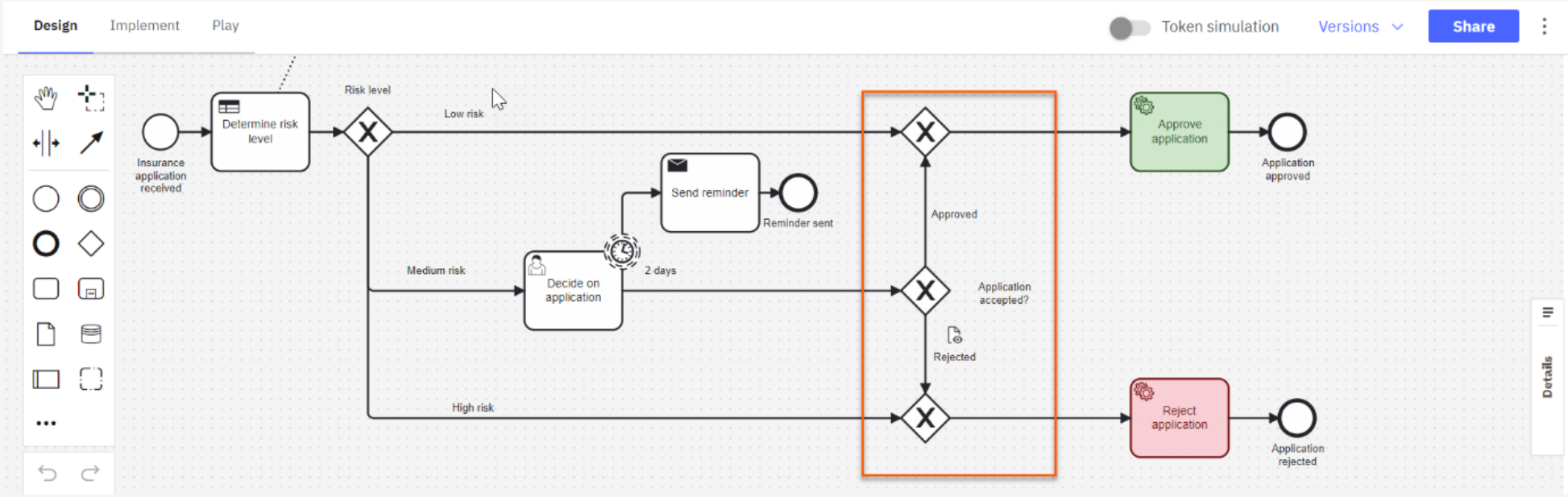
A popup will appear to confirm that the version was created.

Update the process definition

Update the process definition to address the feedback that was left by your colleague and add the missing sequence flow labels.

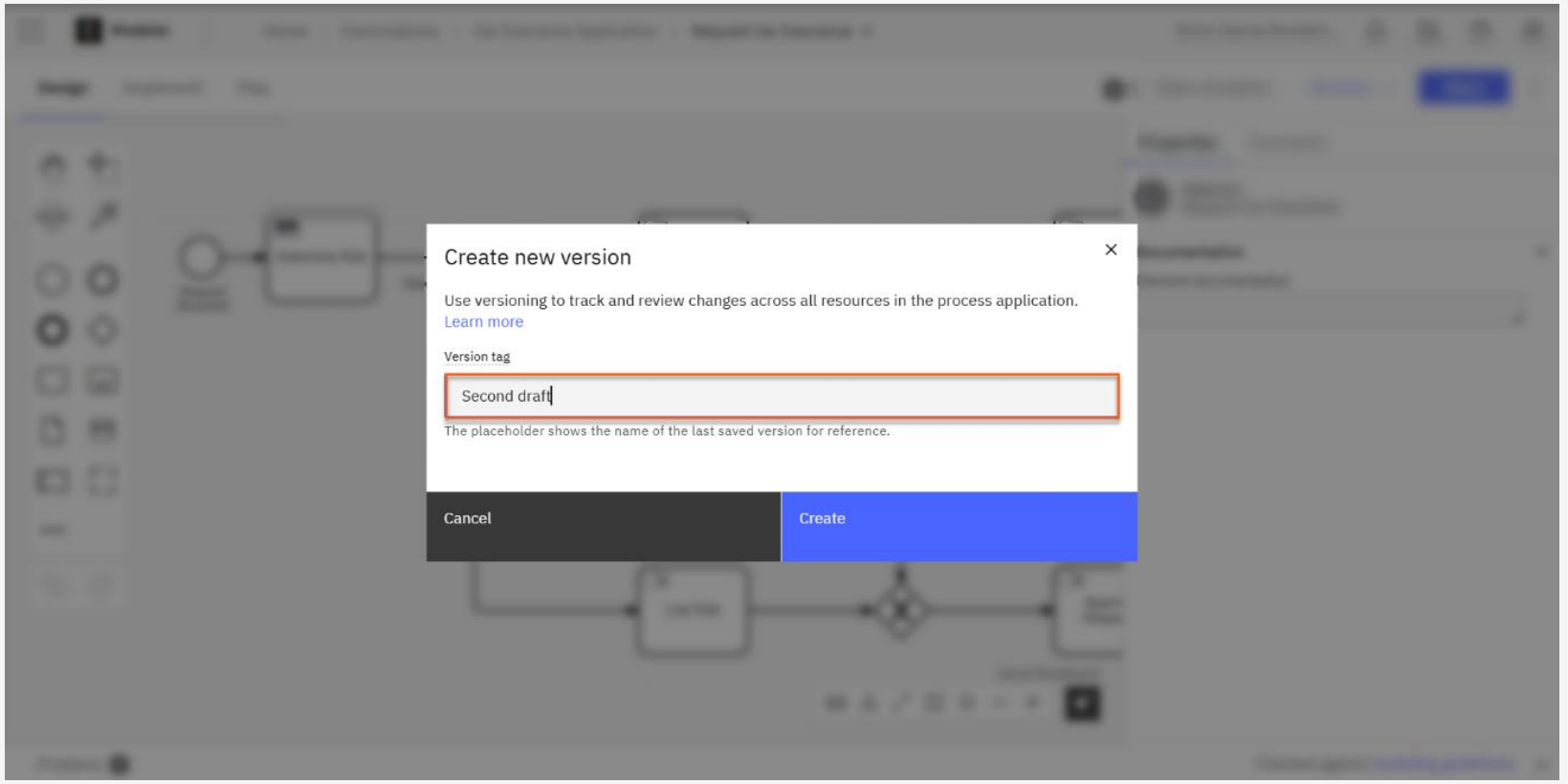
Double-click the **exclusive gateway** at the end of the medium risk path and name it: *Application accepted?*

Label the sequence flow leading to the low risk path *Approved* and label the sequence flow leading to the high risk path *Rejected*.



Update the process definition

Save the updated process definition by creating a new version. Follow the same steps as before, and name this version: *Second draft*.



Update the process definition

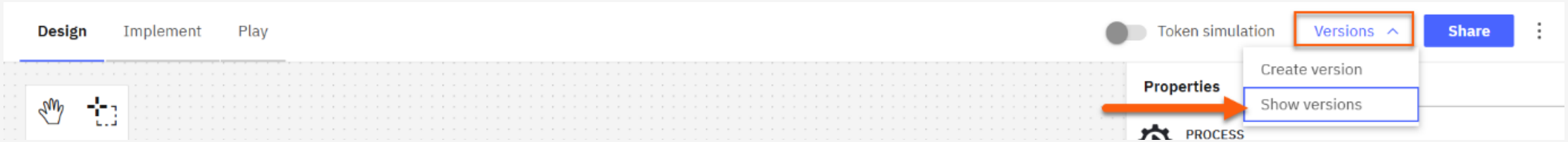
Now that you have implemented the feedback and saved the new version, you can delete the comment left by your colleague, if you like.

To do so, click on the comment icon beneath the exclusive gateway, then click the three dots next to the comment, and click **Delete Comment**.

Compare the versions

Now that you have different versions of your process saved, compare them in the version history.

Click **Versions**, then **Show versions**.

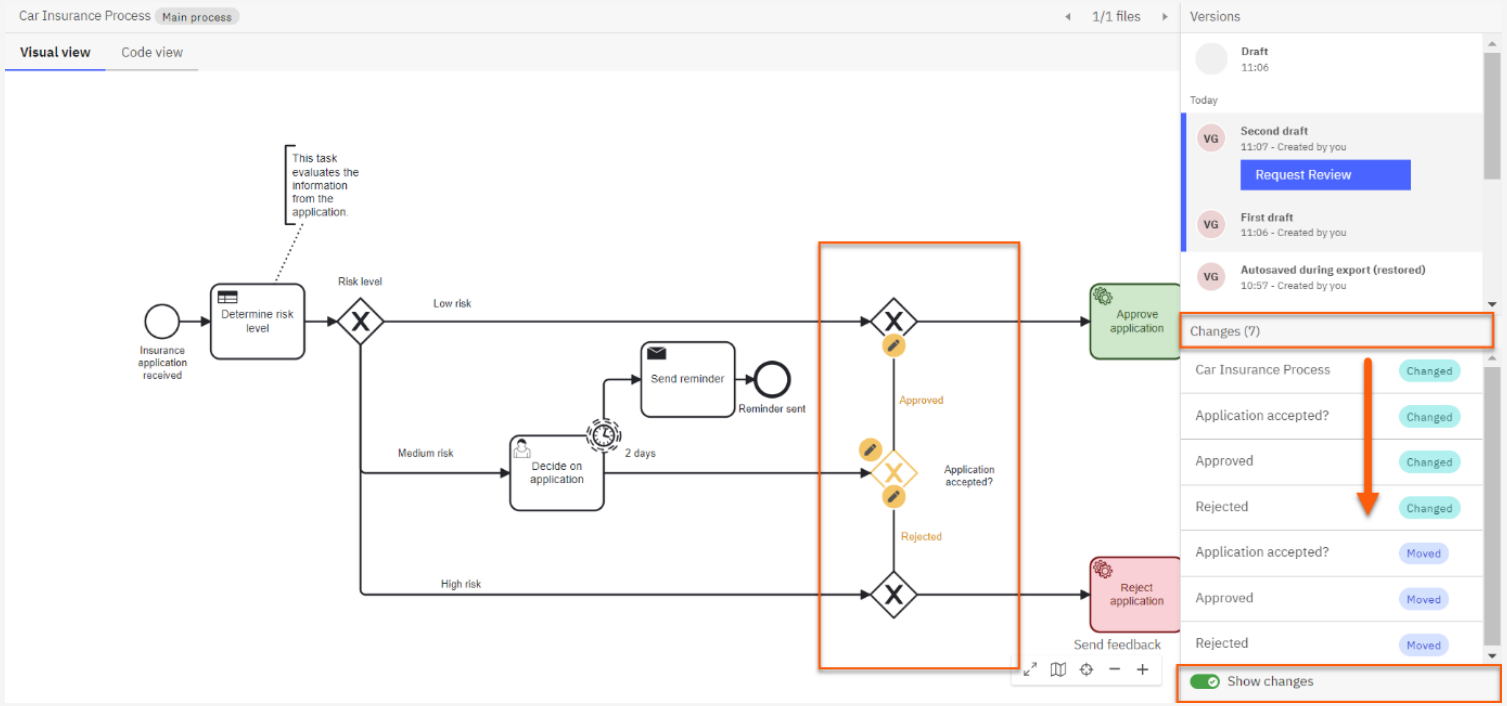


Compare the versions

In the version history at the right, click on the different versions of the version that you saved.

Notice how the process preview window updates to show the changes made to each version.

Show changes must be enabled.



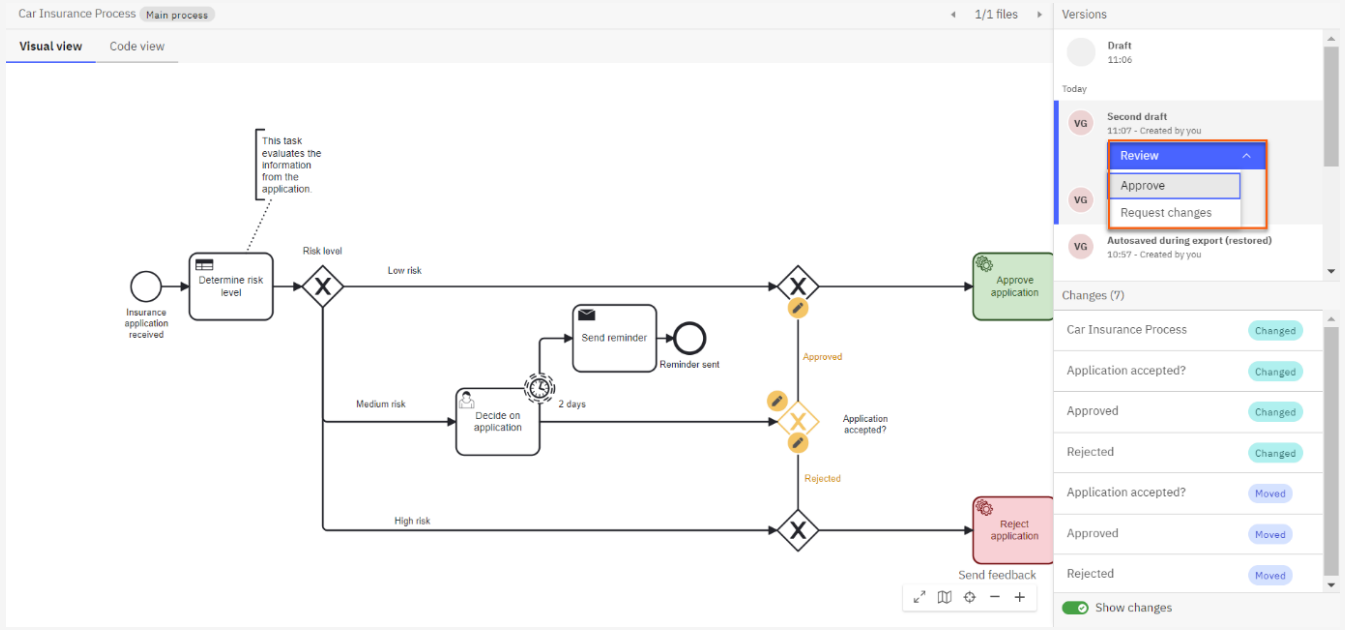
Request a review

You can request the review of any version. Then, the reviewer will **approve** or **request changes** to the version, adding some comments.

1. Click **Request review**. Then, a colleague would review the changes.

In this lesson, **you are the reviewer**. Suppose that you verified the changes and then you approve them.

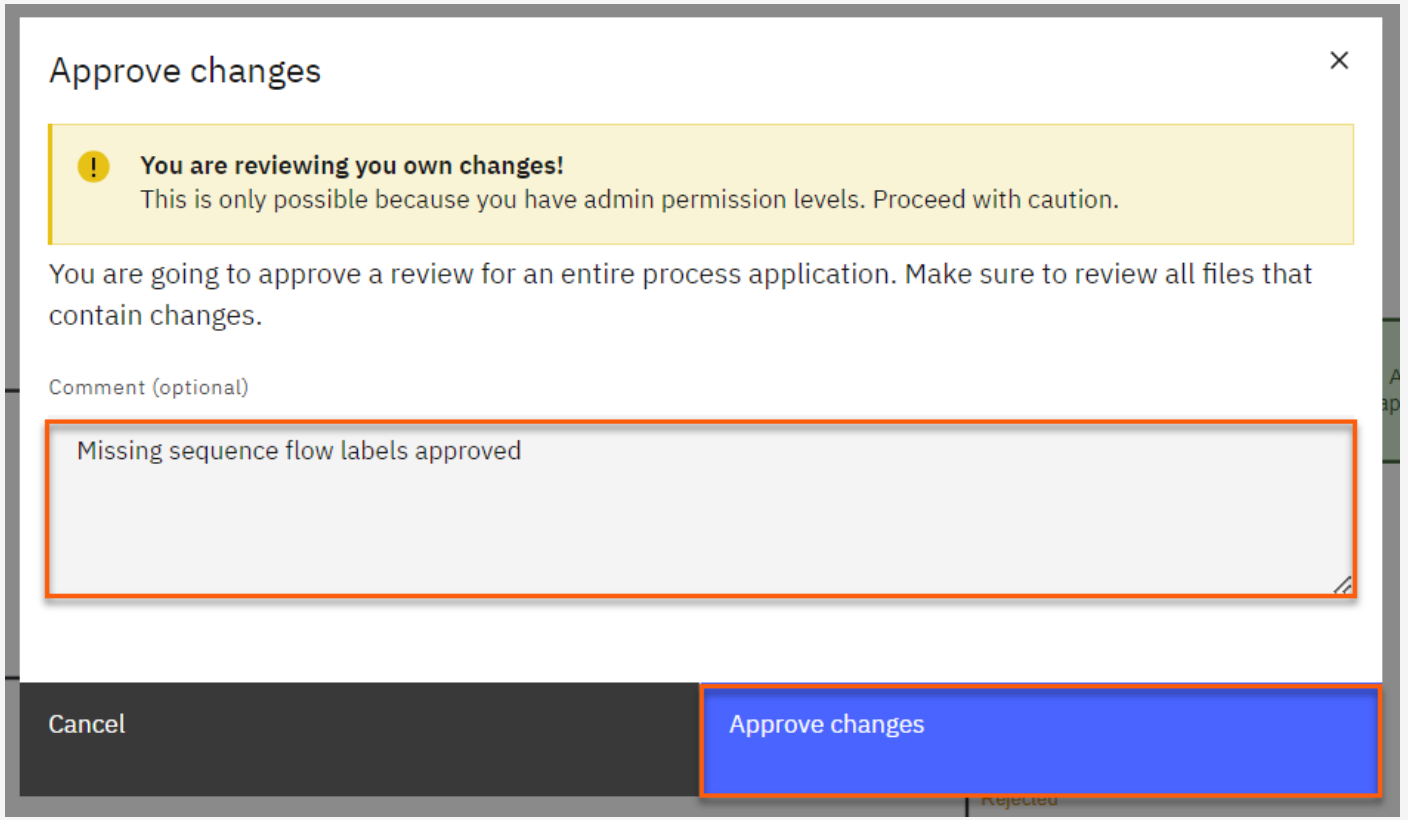
1. Click **Review** > **Aprove**



Request a review

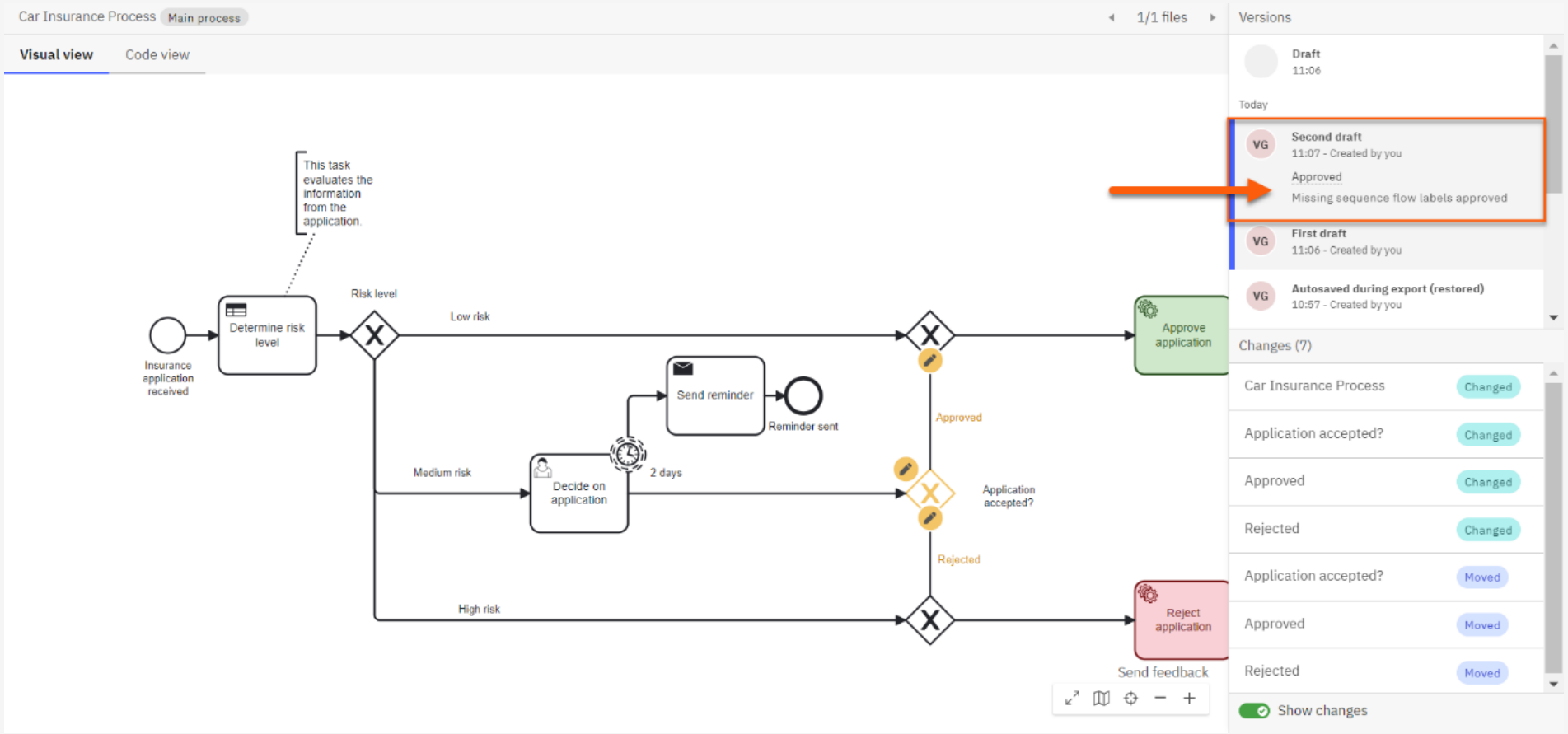
Add this comment: *Missing sequence flow labels approved*

Click **Approve changes.**



Request a review

Now, the version history displays the status **approved** with the comments.

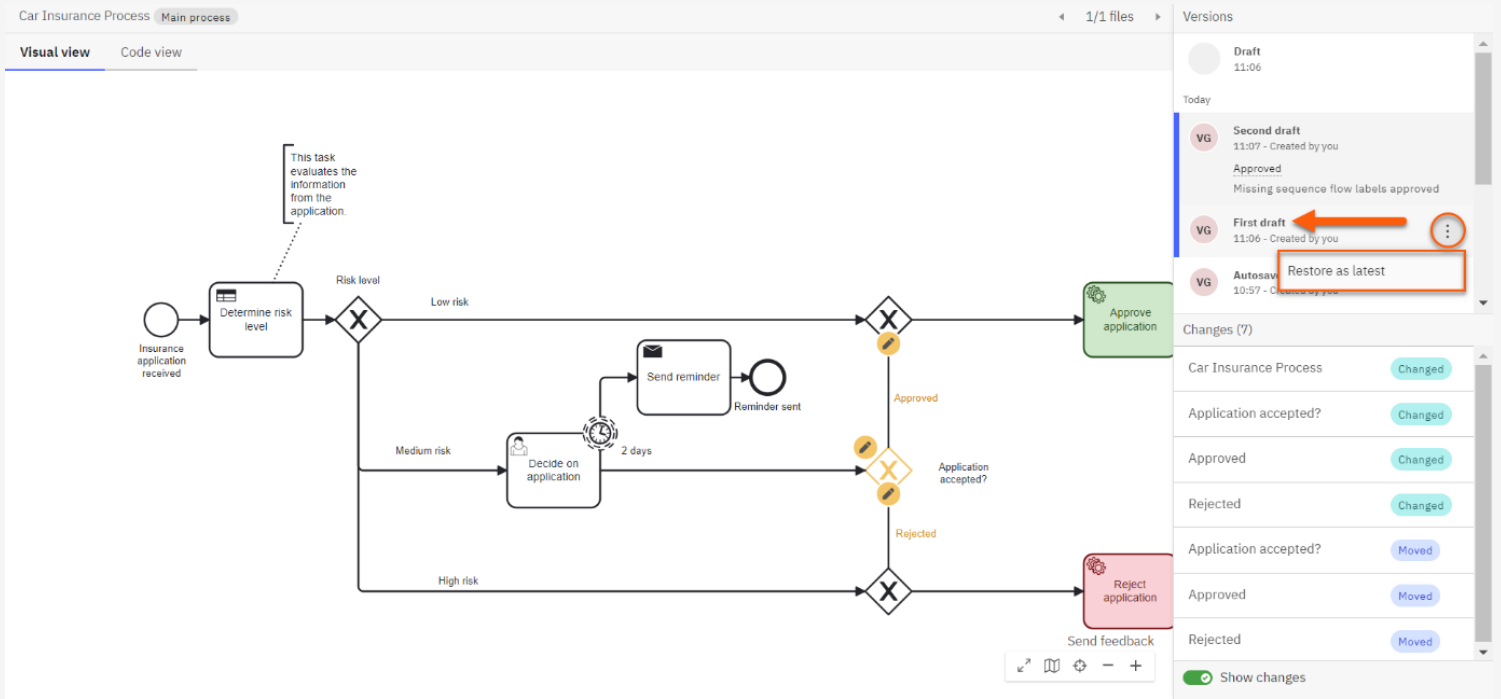


Restore a version

Restore a previous version of the process definition.

To the right of the *First draft* version, click the three dots, and then click **Restore as latest**.

Notice that a new version is created at the top of the version history panel, which is a copied version of the *First draft* version, called *First draft (restored)*.



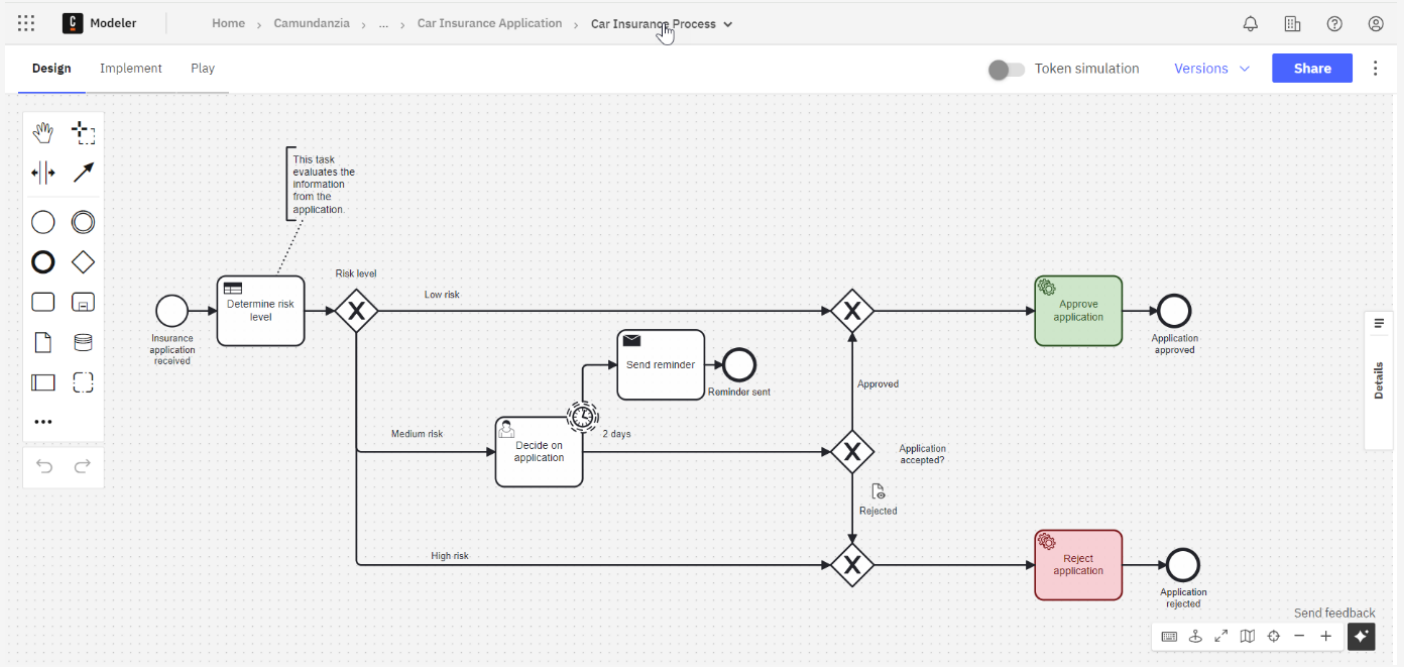
Restore a version

After reviewing the restored version, you would like to revert back to the second draft of the version.

To the right of *Second draft*, click the three dots, and then click **Restore as latest**.

You have now restored the second draft of your process definition.

Return to the process definition by clicking *Car Insurance Process* in the navigation at the top.



What you learned

You should now be able to:

- Recognize the Web Modeler development lifecycle
- Manage projects, process applications, and folders in Web Modeler
- Manage resources
  - Synchronize your project with GitHub
  - Upload resources
  - Find available templates in Marketplace
- Comprehend the different Web Modeler Modes
- Create a BPMN diagram using AI features for an improved modelling experience
- Launch process instances using the Token Simulation tool
- Deploy a process application
- Validate a process using Play

What you learned

You should now be able to:

- Collaborate
  - Add collaborators to a project
  - Share and export a process definition
  - Add annotations, comments, and documentation to your process definition
  - Manage process versioning
  - Request version review