# ecmarchitect.com

Alfresco Developer Series Advanced Workflows 2<sup>nd</sup> Edition February, 2012 Jeff Potts



This work is licensed under the Creative Commons Attribution-ShareAlike 3.0 Unported License. To view a copy of this license, visit http://creativecommons.org/licenses/by-sa/3.0/ or send a letter to Creative Commons, 444 Castro Street, Suite 900, Mountain View, California, 94041, USA.

Alfresco Developer Series Advanced Workflows 2<sup>nd</sup> Edition February, 2012 Jeff Potts

#### About the Second Edition

This tutorial was originally written in November of 2007. Since then, Alfresco has added the Share web client and the Activiti workflow engine, so, at first glance you could say that a lot has changed. On the other hand, if you've already worked through the Custom Content Types and Custom Actions tutorials, you'll already be comfortable with configuring the form service for Alfresco Share. And, although Activiti is an entirely new workflow engine, it was built by the same guys that built jBPM, after all, so it is similar enough in concept that people already familiar with building Alfresco workflows using jBPM should have a pretty easy transition moving to Activiti.

The original version of this tutorial spent a little too long on details up front, which I tried to fix when this tutorial was used as the basis of the workflow chapter in the Alfresco Developer Guide. So, for this edition of the tutorial, I cut down on theory and moved into some Hello World examples as quickly as I could.

I also did a little bit of rearranging to provide two distinct parts to the tutorial so that the first part covers everything you need to know, from concepts to deploying and running processes, with the focus being on the steps and tools using simple processes. The second part focuses on using those tools for a more complex example.

In the 2<sup>nd</sup> edition of the content types and custom actions tutorials, I kept the Alfresco Explorer steps and moved them to the Appendix of those documents. At over 45 pages, this tutorial is long enough, so if you want the jBPM with Alfresco Explorer example, refer to the 1<sup>st</sup> edition. If you want jBPM with Share, you should be able to combine what you learn in the 1<sup>st</sup> edition about jBPM with what you learn about Share configuration in this and other updated tutorials to figure it out. The high-level steps of configuring Activiti for the Share interface are the same for jBPM.

As always, please let me know if you found this helpful. Any and all feedback is welcome on my blog at <a href="http://ecmarchitect.com">http://ecmarchitect.com</a>.

Have fun!

Jeff



### **Table of Contents**

About the Second Edition.	
<u>Introduction</u>	5
Part 1: A Gentle Introduction.	5
What is a workflow?	5
Workflow options.	<i>6</i>
Alfresco workflow	7
Activiti concepts.	
Why two advanced workflow engines?	9
BPMN 2.0.	
Process definitions.	10
What is Activiti?	
Activiti Process Designer.	12
The helloWorld process.	12
<u>Deploying processes</u> .	
<u>Using the workflow console</u> .	
Process Variables.	19
<u>Tasks</u>	19
Task Assignment	
Pooled Assignments	
Wiring a process to the Alfresco UI.	
Add logic to the process definition.	22
Define a workflow-specific content model	23
Configure the web client	
Externalize the strings	
<u>Implementation summary</u> .	
Part 2: SomeCo Whitepaper submission example	
Business process description.	
<u>High-level steps</u> .	
Step 1: Implement the basic flow and workflow user interface.	
<u>Layout the process</u>	
Configure User Tasks with Assignments.	
Add decision logic.	
Workflow content model, UI config, and localization.	
Deploy and test.	
Step 2: Implement web scripts and actions.	
Call the set-web-action in the Approved node	
Implement the external third-party review	
Implement the Web Script.	41

# ecmarchitect.com

Create a custom task listener.	41
Deploy and test.	43
Step 3: Add a timer to the third-party task.	
Deploy and test	45
Conclusion	
Deploying and testing.	45
Where to find more information.	
About the author	47

#### Introduction

This article is about the advanced workflow functionality available in Alfresco through its embedded Activiti workflow engine. First, because "workflow" can mean different things to different people, I'll talk about my definition of the term. Then, I'll introduce some Activiti concepts that will help you understand how processes are defined and how the workflow engine actually works. Once that foundation is in place, I'll walk through some examples that features many of the different concepts.

This tutorial builds upon the "SomeCo" examples covered in earlier tutorials. In it, I'll implement a business process that helps SomeCo route whitepapers for review and approval by internal as well as external parties.

### Part 1: A Gentle Introduction

This section starts out with a brief description of what workflow is, then moves on to describe the workflow implementation within Alfresco. I'll take you through a few Hello World examples so you can get your feet wet by learning how to create very simple process definitions, deploy them to Alfresco, and use the workflow console. Then, in Part 2, I'll take you through a more realistic example.

#### What is a workflow?

When Alfresco released version 1.4 of the product, they made a huge leap forward in enterprise readiness. That was the release when Alfresco embedded the JBoss jBPM engine into the product which meant that enterprises could route Alfresco repository content through complex business processes. A content repository without the ability to facilitate business processes that produce, consume, or transform the content within it is little more than a glorified file server, so this was a welcome addition.

But before I geek out on the wonders of graph based execution languages let's agree on what the term *workflow* means. Generically, a workflow is "a reliably repeatable pattern of activity enabled by a systematic organization of resources...that can be documented and learned". The term has been around since people started studying the nature of work in the early 20<sup>th</sup> century in an effort to streamline manufacturing processes.

In fact, in the world of ECM, it is sometimes helpful to think of an assembly line or manufacturing process when thinking about how content flows through an organization. Content is born of raw material (data), shaped and molded by one or more people (collaboration) or machines (systems), reviewed for quality, and delivered to consumers. Content may go through a single process or many sub-processes. Content may take different routes through a process based on certain aspects of that content. The output of an organization or department of knowledge workers is essentially the content

<sup>1</sup> http://en.wikipedia.org/wiki/Workflow



that comes rolling off the assembly line (the collection of workflows that define that organization's business processes).

Although not always formalized or automated, almost everyone in modern society has been involved in a workflow in some way:

- When you submit an insurance claim, you are initiating a workflow.
- If you witness drunk and disorderly conduct on an airline flight and are asked to provide a statement to the airline, you are participating in a workflow. (Seriously, it happens more often than you'd think).
- When you check on the status of your loan application, you are asking for metadata about a running workflow.
- When someone brings you a capital request that requires your approval because it is over a certain dollar amount, a characteristic of that request (the dollar amount) has triggered a decision within the workflow that routes the capital request to you.
- When you give the final approval for a piece of web content to be published, it is likely you are completing a workflow.

As varied as these examples are, all of them have a couple of things in common that make them relevant to ECM: (1) They are examples of human-to-human and, in some cases, human-to-machine interaction and (2) They are content- or document-centric.

These are two very important characteristics that help clarify the kind of workflow we're talking about. There are standalone workflow engines (in fact, Activiti is one of them) that can be used to model and execute all sorts of "repeatable patterns of activity", with or without content, but in the ECM space, the patterns focused on most often are those that involve humans working with content.<sup>2</sup>

### **Workflow options**

Some of you are saying, "You're right. Workflows are everywhere. I could really streamline my organization by moving processes currently implemented with email, phone calls, and cubical drivebys into a more formalized workflow. What are my options?" Let's talk about three: Roll your own, Standalone workflow engines, and Embedded workflow engines.

**Roll your own**. People are often tempted to meet their workflow requirements with custom code. Very basic systems might be able to get by with a single flag on a record or an object that declares the status of the content like "Draft" or "In Review" or "Approved". But flags only capture the "state" of a piece of content. If you want to automate *how* content moves from state to state, the coding and maintenance becomes more complex. Sure, you can write code as part of your application that knows that once Draft documents are submitted for review, they need to go to Purchasing first and then to Finance, if and only

<sup>2</sup> Of course document-centric workflows may include fully automated steps and machine-to-machine interactions—the point is that document-centric workflows in which humans review, approve, or collaborate in some way are in the scope of the discussion while processes which run lights-out system-to-system orchestration or integration are not.

if the requested cash outlay is more than \$10m but do you really want to?

People intent on rolling their own workflow often realize the maintenance problem this creates, so they create an abstraction used to describe the flow from state-to-state that keeps them from embedding that logic in compiled code. Once they've done that, though, they've essentially created their own proprietary workflow engine that no one else in the world knows how to run or maintain. And with all of the open source workflow engines available, why would you want to do that? So the "roll your own" option is really not recommended for any but the most basic workflow requirements.

**Standalone engines**. There are a number of standalone workflow engines—sometimes more broadly referred to as BPM (Business Process Management)—both open source and proprietary. These are often extremely robust and scalable solutions that can be used to model, simulate, and execute any process you can think of from high-volume loan processing to call center queue management. Often, these workflow engines are implemented in conjunction with a rules engine which lets business users have control over complicated if-then-else decision trees.

Standalone engines are most appropriate for extremely high volume or exceedingly complex solutions involving multiple systems. Another good use for standalone engines is when you are developing a custom application that has workflow requirements. Standalone engines can usually talk to any database or content management repository you might have implemented, but they won't be as tightly integrated into the content management system's user interface as the workflow engine built-in to the CMS. For this reason, for content-centric solutions that operate mostly within the scope of the CMS, it is usually less complicated (and less costly) to use the workflow engine embedded within the CMS, provided it has enough functionality to meet the business' workflow requirements.

**Embedded workflow engines**. Almost every CMS available today, whether open source or proprietary, has a workflow engine of some sort embedded within it. However, the capability of each of these vary widely. If you are in the process of selecting a CMS and you already know the kind of workflow requirements you'll face, it is important to understand the capabilities of the workflow engine embedded within the systems you are considering before making a final selection.

The major benefit of leveraging an embedded workflow engine is the tight level of integration for users as well as developers. Users can initiate and interact with workflows without leaving the CMS client. Typically, developers customizing or extending the CMS can work with workflows using the core CMS API.

#### Alfresco workflow

Alfresco has two options for implementing workflows within the product. For very simplistic workflows, non-technical end-users can leverage Alfresco's Basic Workflow functionality. For more complex needs, Alfresco has Advanced Workflow functionality.

Basic workflows are a nice end-user tool. You should know how they work and what the features and limitations are so you can make good decisions about when to use them. Basic workflows use folders and a "forward step/backward step" model to implement serial processes. When a piece of content is

dropped in a folder, a rule is triggered that associates a "forward step" and a "backward step" (one or the other or both) with the content. These steps are tied to Alfresco actions such as "Set a property" or "Move the content to a specified folder". End users can then click on the appropriate step for a given piece of content.

For example, suppose SomeCo has a simple submit-review-approve process in which content is submitted, then reviewed, then approved or rejected. One way to implement this with basic workflows is to use three folders—let's say they are called "Draft", "In Review", and "Approved"—each of which have a rule set that applies a basic workflow. The workflow for content in the Draft folder would have a single forward step labeled "Submit" and its action would move content to the "In Review" folder and send an email to the approver group. The "In Review" folder would have a workflow in which the forward step would be labeled "Approve" and it would copy the content to an "Approved" folder. The backward step would be labeled "Reject" and its action would move the content back to the "Drafts" folder.

In the "Custom Content Actions" tutorial, you created a custom rule action called "Move Replaced" that could be used in conjunction with this basic workflow to move old content out of the Approved folder and into an Archived folder, for example.

You can see that basic workflows are useful, and when combined with rules and actions, you can automate simple business processes. But basic workflows are limited with regard to the complexity of the business processes they can handle.

Although I haven't yet covered the detailed capabilities of Alfresco advanced workflows, I thought it would be a good idea to compare basic and advanced workflows at a high level now so I can leave the topic of basic workflows behind and spend the rest of the article on advanced workflows:

#### Alfresco basic workflows... Alfresco advanced workflows... Are configurable by non-technical end-Are defined by business analysts and users via the Alfresco web client (Either developers using a graphical tool or by Explorer or Share) writing XML Leverage rules, folders, and actions Leverage the power of an embedded workflow engine (JBoss jBPM or Activiti) Can only handle processes with singlestep, forward and/or backward, serial • Can model any business process including flows decisions, splits, joins, parallel flows, subprocesses, wait states, and timers Do not support decisions, splits, joins, or parallel flows Can include business logic written either in JavaScript or Java, either of which can Do not maintain state or metadata about access the Alfresco API the process itself Maintain state and process variables Do not support the concept of task (metadata) about the process itself) assignment Support assigning tasks to individuals,

Alfresco basic workflows	Alfresco advanced workflows
	groups, and pools of users

Now that you understand the definition of workflow in the context of ECM, some of the options for implementing workflow requirements, and the options within Alfresco specifically, it's time to take a closer look at the Activiti engine.

### Activiti concepts

This section introduces you to some Activiti concepts. First, I'll discuss why there are two workflow engines embedded within Alfresco in the first place. Then I'll move into Activiti and the Activiti Process Designer. Finally, I'll take you through some extremely simple Hello World processes just to show how the whole thing works from end-to-end.

### Why two advanced workflow engines?

Starting with Alfresco 4, Alfresco has two embedded Advanced Workflow engines to choose from: JBoss jBPM and Activiti.

The JBoss jBPM engine is the original Advanced Workflow engine included with Alfresco. Desiring to have an Apache-licensed workflow engine, Alfresco hired jBPM creator, Tom Baeyens, and some of his team to start a new open source project aimed at building an Apache-licensed, BPMN 2.0 compliant workflow engine. The result is Activiti.

Both jBPM and Activiti are open source and both can be used as standalone workflow engines in solutions completely unrelated to Alfresco and document management.

Because both engines exist in Alfresco 4, you can choose the engine that meets your needs. If you are starting with a fresh Alfresco installation, Activiti is the default and all jBPM example workflows have been undeployed. If you upgrade an existing Alfresco installation, you can continue to use jBPM for old workflows and use Activiti as you see fit.

Alfresco has obviously made a significant investment in Activiti, so, if possible, you should use Activiti for your Alfresco workflows going forward. If you can't, for some reason, and would like to read more about jBPM, refer to the first edition of this tutorial. The rest of this document focuses on Activiti.

#### **BPMN 2.0**

I mentioned earlier that Activiti is BPMN 2.0-compliant. BPMN stands for Business Process Modeling Notation. It's a specification managed by the Object Management Group (OMG) that defines exactly what the name suggests: A standard syntax for describing business processes. The specification is aimed at both humans (i.e., graphical notation of a business process) and machines (i.e., XML syntax

describing the business process).

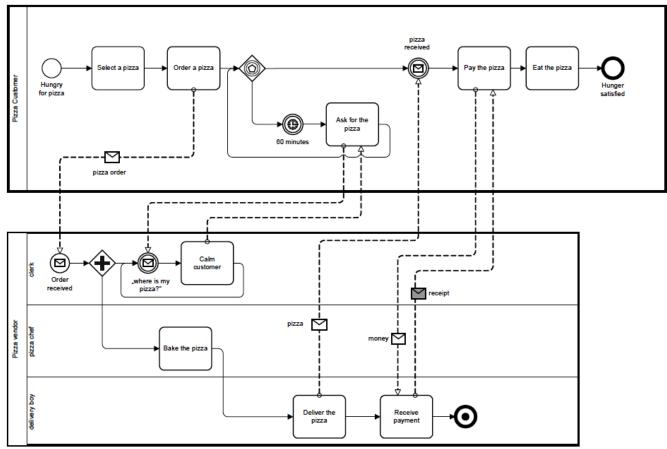
The two main benefits of using a BPMN-compliant workflow engine are:

- 1. When business analysts collaborate on business process projects, they can use a common diagram and language to discuss the process, regardless of the tool that is ultimately used to implement it.
- 2. Any tool that produces BPMN-compliant XML can be used to define a business process and the resulting XML should theoretically work with any compliant workflow engine.

#### **Process definitions**

A business process can be described as a graph of connected nodes. In Activiti (and really, in BPMN) these nodes are essentially events (start, stop, timer), tasks, and gateways. These nodes are connected by "sequence flows". You can model just about any business process you can think of by organizing events, tasks, gateways, and sequence flows on a diagram.

The OMG has a great document called, "BPMN 2.0 by Example" that shows several examples of business process diagrams and then walks you through each. There's a link to it at the end of this document. The diagrams include features not currently included in Activiti, but they do illustrate the kinds of things you can do with BPMN 2.0. For example, here's a diagram from that document called "The Pizza Collaboration":



Drawing 1: OMG's Pizza Collaboration Example

A process, then, is a collection of events, tasks (some automated, some performed by humans), and gateways, connected by sequence flows.

#### What is Activiti?

Activiti is an open source, standalone workflow engine. All it needs is Java. It can run in a servlet container or it can be embedded in any Java application. The Activiti engine is responsible for managing deployed processes, instantiating and executing processes, persisting process state and metadata to a relational database, and tracking task assignment and task lists.

Activiti is its own independent open source project. It just happens that the founders of the project and several other members of the development team are employed by Alfresco. Activiti is built to be embedded in any application that has workflow requirements. What's cool is that the work of integrating it with Alfresco has already been done for you.

#### Activiti Process Designer

There are many tools available that can produce BPMN 2.0 diagrams. Many of you are already Eclipse users, so you'll be glad to know that there is an Activiti BPMN 2.0 Process Designer plug-in. You can install the latest by pointing Eclipse at the Activiti update site or you can download a specific version and install it into Eclipse manually.

Let's create a couple of super simple Hello World processes using the Activiti Process Designer. These processes will not be wired into the Alfresco web client user interface. Instead, I'll use the workflow console to start them. Once I've run through the basic steps of diagramming and deploying workflows, I'll show you examples that are fully integrated into the user interface.

Before starting, a quick note: The examples in this tutorial build upon the code created from earlier tutorials. I'm copying that code into two new Eclipse projects: workflow-article-repo and workflow-article-share. The workflow-article-repo project is where the business process definitions live. I'm going to place mine in config/alfresco/extension/workflows. The workflow-article-share project is where the Share configuration lives.

#### The helloWorld process

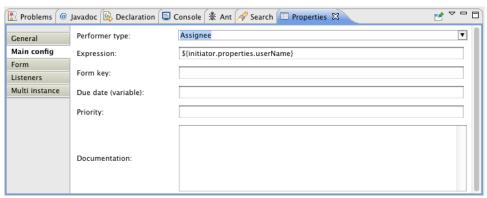
The helloWorld process will consist of a start event, a user task, and an end event. I want it to do nothing more than write "Hello, World!" to the Alfresco log.

Right-clicking on the workflows folder, choosing New, Other, Activiti Diagram, and specifying "helloWorld" for the name gives me a blank canvas to start drawing my business process. After dragging and dropping a start event, user task, and end event from the palette and connecting them with sequence flows, the diagram looks like this:



Drawing 2: Hello World BPMN Diagram

Initially, the diagram will not save because the User Task is missing an assignee. I'll talk more about assignees later. For now, if it isn't open already, open the "Properties" view, click the User Task task, and specify "Assignee" for the performer type and "\${initiator.properties.userName}" for the Expression, like this:



Drawing 3: Hello World user task properties

Now the diagram should save.

If you look at the files in your project, you should notice that a new file, helloWorld.bpmn20.xml, was automatically created when the .activiti file was saved. That's the actual process definition written in BPMN XML and it is the file that will get deployed to the Activiti engine.

I want to put a little logger statement in the process to show you how to add code to a process. Activiti supports multiple scripting languages, but in Alfresco's embedded Activiti, JavaScript is the most practical because it gives you access to the full JavaScript API.

After making sure the .activiti file is saved, I'm going to open up the BPMN file and look for the sequence flow that connects the start event to the user task. It should look something like this:

```
<sequenceFlow id="flow2" name="" sourceRef="startevent1"
targetRef="usertask1"></sequenceFlow>
```

Listing 1: Sequence flow between the start event and the user task

Activiti has all kinds of hook points for custom code. I want to log a message when this sequence flow starts, so I'll add an execution listener on the flow, like this:

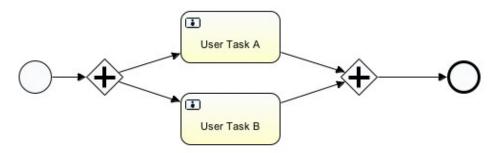
Listing 2: Sequence flow with an execution listener that runs Alfresco JavaScript

You can see that the event I'm hooking into is "start" and the class I'm executing is an out-of-the-box class called ScriptExecutionListener. The "activiti:string" element could contain any server-side JavaScript I need. For right now, I'm keeping it simple with a logger statement. In a later example, I'll

iterate over the documents in the workflow package and run an action against each one.

The Activiti process designer will keep the diagram (the .activiti file) synchronized with the BPMN file (the bpmn20.xml file). **But it is very important to note that in versions 5.7.1 of the process designer and earlier, the synchronization is one-way, from the diagram to the BPMN file**. Right now, I have changes in the XML that the diagram doesn't know about. So I'm going to save the BPMN file and then delete the activiti file. The next time I open the BPMN file, the activiti file will be re-created. If I fail to do this, and then make a change to the activiti file, my beautiful logger statement will be overwritten. After version 5.7, the synchronization becomes two-way. It is safe to use a newer version of the process designer than the version of the Activiti engine that is embedded within Alfresco (Activiti 5.7 is in Alfresco 4).

Before I show you how to deploy the process definition to Alfresco, let's do another Hello World example that does a fork and a join. I'll create a new diagram in the workflows folder, but this time I'll call it "helloWorldFork". This process will have two user tasks. I will split the flow using a gateway. I want the two user tasks to happen at the same time so I'll use a parallel gateway. If I wanted instead to choose only one path of execution, I'd use an exclusive gateway.



Drawing 4: Hello World Fork BPMN Diagram

Similar to the first example, I can add a logger statement to the sequence flows leading to the two user tasks:

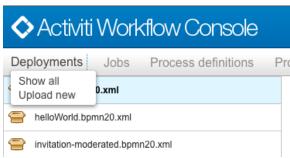
```
<extensionElements>
        <activiti:executionListener event="start"</pre>
class="org.alfresco.repo.workflow.activiti.listener.ScriptExecutionListener">
          <activiti:field name="script">
            <activiti:string>
                logger.log("Hello, World, from transition to User Task B!");
            </activiti:string>
          </activiti:field>
        </activiti:executionListener>
      </extensionElements>
    </sequenceFlow>
```

Listing 3: Parallel sequence flows with Alfresco JavaScript logger statements

With a couple of, admittedly, ridiculously simple examples saved in my Eclipse project, I'm ready to deploy.

#### Deploying processes

If you are using Alfresco 4 Enterprise, you have a couple of deployment options. The first option is to use the Activiti Workflow Console which is accessible to administrators through a link in the Share Administration console, or by navigating directly to <a href="http://localhost:8080/alfresco/activiti-admin">http://localhost:8080/alfresco/activiti-admin</a>. From there clicking Deployments, Upload New will display a file upload dialog which can be used to upload the bpmn20.xml file.



Drawing 5: Uploading a process using the Activiti Workflow Console

Although we are working to get it added to the Community Edition, the Activiti Workflow Console isn't there yet, so everyone else will have to use the other option, which is to include the process definitions in your classpath and then use either the Explorer Workflow Console, Spring, or both, to deploy the process.

I'm going to use Spring to deploy my workflows initially. Then, I'll use the Explorer Workflow Console to deploy subsequent versions if I need to. In my Eclipse project, in config/alfresco/extension, I'll create a new Spring context file called some co-workflow-context.xml. In it, I'll add a workflow deploy bean, like this:

```
<bean id="someco.workflowBootstrap" parent="workflowDeployer">
       property name="workflowDefinitions">
           t>
               props>
                   prop key="engineId">activiti</prop>
key="location">alfresco/extension/workflows/helloWorld.bpmn20.xml</prop>
                   prop key="mimetype">text/xml</prop>
                   prop key="redeploy">false</prop>
               </props>
               props>
                   prop key="engineId">activiti</prop>
key="location">alfresco/extension/workflows/helloWorldFork.bpmn20.xml</prop>
                   prop key="mimetype">text/xml</prop>
                   prop key="redeploy">false
               </props>
         </list>
       </property>
   </bean>
```

Listing 4: Spring bean configuration to deploy workflows

I've got "redeploy" set to false to prevent the workflows from being redeployed every time I restart the web application.

The JavaScript in these business processes contain "logger" statements. To get those to show up in the log, I'm going to edit \$TOMCAT\_HOME/webapps/alfresco/WEB-INF/classes/log4j.properties to change the ScriptLogger to debug:

```
log4j.logger.org.alfresco.repo.jscript.ScriptLogger=debug
Listing 5: Turning on ScriptLogger debug statements
```

Now everything is ready to go. The Ant build.xml file included with the project will put everything in the appropriate extension directory when I run "ant deploy". If you are following along, you'll see some content models and some Java classes getting deployed as well, but they aren't relevant to these two hello world processes.

You may be wondering what happens to running workflow instances when a new version of the process definition is checked in. The answer is that Activiti handles that—it makes sure that running workflows continue to run with their original process definition. By default, all new workflows will use the most current version of the process definition.

### Using the workflow console

I want to make sure my workflows were deployed successfully and I want to start instances of my hello world processes. The workflow console can be used to do just that. It can also be a handy workflow debugging tool.

For reasons that cannot be fully explained, the Alfresco Explorer Workflow Console is not linked to

anywhere in the user interface. Like Easter Island, the pyramids, and Stonehenge, it is one of the great mysteries of our time. You just have to know that the URL is

http://localhost:8080/alfresco/faces/jsp/admin/workflow-console.jsp. Make sure you log in to Alfresco Explorer as an administrator first.

Once there I can do a "show definitions all" to see what process definitions have been deployed:



Drawing 6: Workflow console: Show definitions all

Sure enough, there are helloWorld and helloWorldFork. I want to start an instance of helloWorld, so I'll do a "use definition activiti\$helloWorld:1:6104". Subsequent commands having to do with a workflow definition will now use that one by default. Simply typing "start" and clicking "Submit" starts the workflow:



Drawing 7: Workflow console: Start workflow

And if I look at catalina.out, I can see the log message:

```
INFO: Server startup in 59023 ms
2012-02-09 16:19:25,656 DEBUG [repo.jscript.ScriptLogger] [http-8080-1] Hello,
World!

Drawing 8: Hello World log output
```

If you are following along, you should be able to do a "use" followed by a "start" to launch an instance of the helloWorldFork process and see the log messages from both user tasks.

After running helloWorldFork I want to see if any workflow instances are still running, so I do, "show workflows all". I don't fully understand why, but the helloWorld process completes on its own while

the helloWorldFork process does not. If you are following along, you can either log in to the web client and end those tasks using the UI, or you can issue a "use workflow" command followed by a "delete workflow" to kill the workflow. You should also be able to use "end task" in the workflow console to end the tasks, but I received a null pointer exception when attempting to do so.

I've shown how to start workflows and list running workflows from the workflow console. The table below shows some other common commands and what they do.

Command	What it does	
show workflows all	Shows all running workflows.	
use workflow <pre>where <pre><workflow id=""> is something like activiti\$6300</workflow></pre></pre>	Makes all subsequent commands happen in the context of the specified workflow.	
show transitions	Shows all leaving transitions.	
where <path id=""> <transition> where <path id=""> is something like activiti\$6334 and transition is the name of the leaving transition you want to take. Leave off the transition to take the default.</path></transition></path>	Signals the token. Good when your workflow is stuck on a node or when you want to take a transition without fooling with the task management UI.	
desc path <path id=""> where <path id=""> is something like activiti\$6334</path></path>	Dumps the current context. Great for debugging process variables.	
end workflow <pre>where <pre>cworkflow id&gt; is something like activiti\$6300</pre></pre>	Cancels the specified workflow.	
show definitions all	Shows the current deployed workflows.	
undeploy definition <workflow id=""> Or undeploy definition name <workflow name=""></workflow></workflow>	Undeploys the specified workflow and stops any workflows running with that definition. The <workflow id=""> variant undeploys a specific version of a workflow.</workflow>	

These are a subset of the commands available. Type "help" and click Submit to see the full list of commands.

#### **Process Variables**

Often, there is metadata about a process that needs to be tracked. A due date or a priority flag are two examples. A due date isn't really a property of the content being routed through the workflow—it's a property of the process itself. Activiti gives us the ability to store this kind of data as part of the running process through *process variables*.

Process variables are name-value pairs that will get persisted with the rest of the process state.

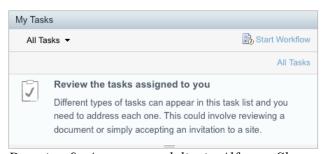
In the example below, I use a "script" element to initialize a couple of variables:

Listing 6: Initializing process variables

Elsewhere in the process I could read the value of the variable with an expression like: \$
{scwf\_tpApproved} or I could test its value in an expression like \${scwf\_tpApproved == false}.

#### **Tasks**

Tasks can be assigned to human performers. Activiti maintains a list of tasks assigned to each participant. How users interact with the task list is up to each application. In Alfresco, a dashlet displays a to-do list for the currently logged in user. As users complete their tasks the tasks are removed from the to-do list. An empty to do list is shown below.



Drawing 9: An empty task list in Alfresco Share

### **Task Assignment**

If tasks are steps a human performs, how do tasks get assigned to the people who need to perform them? Activiti has extended BPMN with their own attribute called "activiti:assignee". The value of the attribute can be a literal username or group name, or it can be an expression. Recall from the earlier Hello World example that I assigned the user task to \${initiator.properties.userName}. Initiator is a special object that will always contain the object representing the person who started the workflow.

<userTask id="usertask1" name="User Task" activiti:assignee="\$
{initiator.properties.userName}"></userTask>

Listing 7: Assigning a task to the workflow initiator

#### **Pooled Assignments**

When defining a business process it is important to understand how the participants in the process will do the work. One specific area that needs to be considered is whether to use a "pooled assignment" for a given task. Suppose, for example, you assigned a task to a group of ten people. You could iterate through the group and assign a task to each and every member of the group and then not consider the task complete until some or all group members have taken action. An alternative is to use a pooled assignment. Using a pool, all members of a group are notified of the task, but as soon as one group member takes "ownership" of the task, it is removed from everyone else's to do list. The owner can then either complete the task or return it to the pool. If it is returned to the pool, all members of the group see the task in their to do list until another person takes ownership or completes the task. To use pooled assignment, use the "activiti:candidateGroups" attribute on the userTask element instead of the "activiti:assignee" element.

The decision to use pooled actors or not depends entirely on the business process—there is no best practice approach.

### Wiring a process to the Alfresco UI

So far I've covered the definition of workflow, specifics around the Activiti engine, and process deployment. And I showed how to run a couple of simple processes entirely from the workflow console. But I haven't addressed how to expose a process to Alfresco web client users.

Workflows are exposed to the user interface through the form service. The form service takes a description of a content model as well as a form configuration and spits out a nice form. So, configuring the workflow in the user interface is simply a matter of defining a corresponding content model and then configuring the form service to use it, just as you would for a content model unrelated to workflow.

If you need a refresher on how this works, take a look at the "Custom Content Types" tutorial. The steps are:

- 1. Define a content model for your workflow in which workflow tasks map to content types.
- 2. Configure the web client to tell Alfresco how to expose the process metadata to the web client user interface. Recall from the "Custom Content Types" tutorial that web-client-configurestom.xml is used to configure Alfresco Explorer while share-config-custom.xml is used to configure the Alfresco Share web client.
- 3. Externalize the strings.

I'm going to walk you through one more Hello World example. But this one will incorporate the user



interface. After that, I'll take you through a real world example that builds upon the SomeCo work started in previous tutorials.

The goal here is to create a workflow which will capture a piece of metadata (a name the logger should for a greeting) when the workflow is submitted, and then write the greeting out to the log. So, over in my Eclipse project, I'll create a new process in my workflows folder called helloWorldUI with the following:

- a start event,
- an end event,
- an Alfresco User Task, and
- an Alfresco Script Task.

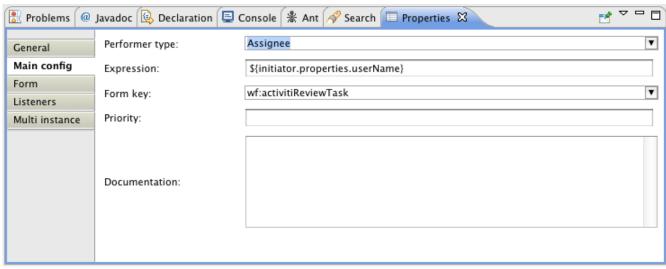
I'm using the Alfresco-specific tasks just for fun. They can save you a bit of typing.

After hooking everything up, the diagram looks like this:



Drawing 10: Hello World UI BPMN Diagram

The next step is to set the properties on the Alfresco User Task. The performer type and expression is the same as in prior examples. What's new is that I am going to set the form key. Because I used the Alfresco User Task, it already knows the out-of-the-box form keys. I'll pick "wf:activitiReviewTask". That value is actually a type defined in the out-of-the-box content model. The type defines a set of properties. And the out-of-the-box form configuration already knows how to display those properties.



Drawing 11: Alfresco User Task properties

The requirement is to let the workflow initiator specify a name that the logger will use in a greeting. So the start event needs to point to a custom form key. I'll call it "scwf:submitHelloWorldTask". I'll create a custom type of that name in a new content model shortly.



Drawing 12: Start event properties

### Add logic to the process definition

The diagram is done. Now I'll switch to the BPMN XML and add just a little bit of logic. The review task lets the user select "approve" or "reject". The execution of the workflow needs the value of that

selection, so I need to add some logic to make that happen:

Listing 8: Setting an execution variable using the value of a task variable

Next, I want the log to print the greeting:

Listing 9: Alfresco JavaScript writing a log entry with the value of the scwf helloName variable

And, finally, just to show that a value can be set in one task and read in another, I'll log the value of the approve/reject selection. I'll do this from within the Alfresco Script service task:

Listing 10: Logging the value of the wf reviewOutcome

Now the process is ready to go. The next step is to get the workflow content model squared away.

### Define a workflow-specific content model

The workflow-specific content model defines the data structure for the process. Workflow models use the same fundamental building blocks—types, properties, aspects, and associations—as "normal"

# ecmarchitect.com

Alfresco content model definitions. In fact, if you already have a custom model, you can define your workflow-specific model in the same content model XML file, although to reduce confusion, I recommend you keep your content types separate from your workflow types by using at least two different model files.

What is the purpose of the workflow-specific model? Think of it like any other content model. Custom content models are used to define the metadata that needs to be captured about a piece of content. The metadata (properties) are grouped into types and aspects. By virtue of defining these properties as part of the content model, Alfresco takes care of persisting the data to the underlying database.

Workflow models function in the same way. Suppose you have a process in which three different departments are involved in an approval process. Maybe you'd like the workflow initiator to be able to define which of those departments are required approvers and which are optional or "FYI" reviewers. A workflow model would define how that information is going to be stored.

As in other content models, you don't have to start from scratch. Alfresco ships out-of-the-box with some workflow-specific types already defined. There are two model definition files related to this. One is called called bpmModel.xml. It resides in your Alfresco web application root under WEB-INF/classes/alfresco/model. The other is called workflowModel.xml and it resides under WEB-INF/classes/alfresco/workflow.

The **bpmModel** file contains the lowest-level workflow classes such as the base definition for all tasks and the default start task. It also contains important aspects such as a set of "assignee" aspects that define associations between tasks and users or groups.

The **workflowModel** file contains the content model for the out-of-the-box process definitions. This model file offers a lot of potential for reuse in your custom processes. For example, if your process starts by allowing the submitter to specify a list of several people to receive a task, you could use the "wf:submitParallelReviewTask" type. If you want to base an approval on the percentage of individuals who approve a task, you can use the "wf:submitConcurrentReviewTask" type. Of course just like any model you are free to use these as-is, extend them, or not use them at all.

When users interact with the workflow via the web client, Alfresco will use the workflow content model and the web client configuration file to figure out what metadata to expose to the UI and how to present it just as it does when viewing content properties. In Activiti, Alfresco uses the value of the form key attribute to figure out the appropriate workflow content type. So, all tasks in which there are Alfresco web client user interactions must be given a form key that corresponds to the name of a workflow content type.

In the helloWorldUI example, I defined the following start event:

```
<startEvent id="startevent1" name="Start"
activiti:formKey="scwf:submitHelloWorldTask"></startEvent>
```

Listing 11: Start event from the Hello World UI example

Now I need to create a content model with a custom type that corresponds to the form key value. From previous tutorials you know that models are defined in XML and reside in the Eclipse project under config/alfresco/extension/model. I'll create a content model just for SomeCo workflows in a file called



scWorkflowModel.xml. It defines a namespace, "scwf", and a type. Here's a snippet:

Listing 12: The scwf:submitHelloWorldTask type

The type is a child of bpm:startTask and declares a property called "scwf:helloName". That's a text property that will be displayed as a text field the workflow initiator can use to tell the workflow who to greet.

Alfresco needs to know about this model. I'll add it to the workflow context file shortly.

### Configure the web client

The next step is to tell Alfresco how to display the process metadata. This works exactly like custom content types. Continuing the example, I need to tell the user interface to show the "scwf:helloName" property when the "scwf:submitHelloWorldTask" is used. The snippet below shows how to do that in the web-client-config-custom.xml for Alfresco Explorer:

Listing 13: Alfresco Explorer user interface configuration

And here is how to do that in share-config-custom.xml for Alfresco Share:

```
<set id="" appearance="title" label-id="workflow.set.general" />
               <set id="items" appearance="title" label-id="workflow.set.items" />
               <set id="other" appearance="title" label-id="workflow.set.other" />
               <set id="response" appearance="title" label-</pre>
id="workflow.set.response" />
               <field id="bpm:workflowDescription" label-
id="workflow.field.message">
                  <control
template="/org/alfresco/components/form/controls/textarea.ftl">
                     <control-param name="style">width: 95%</control-param>
                  </control>
               </field>
               <field id="packageItems" set="items" />
               <field id="helloName" set="other" />
               <field id="transitions" set="response" />
            </appearance>
         </form>
      </forms>
    </config>
```

Listing 14: Alfresco Share web client configuration

Now, when someone starts the helloWorldUI workflow from either web client, the form will render a field that will capture the "scwf:helloName" property.

#### **Externalize the strings**

The final step is to externalize the strings used to display things like the workflow title and description that show up in the "Start Advanced Workflow" dialog, and titles and descriptions for individual tasks. The identifiers for these strings follow a specific format. I'll put my properties in config/alfresco/extension/messages/scWorkflow.properties:

```
# Workflow related strings
helloWorldUI.workflow.title=Hello World UI (Activiti)
helloWorldUI.workflow.description=A simple hello world process using Activiti

# Workflow Model related strings
scwf_workflowmodel.type.scwf_submitHelloWorldTask.title=Start Hello World UI
Workflow
scwf_workflowmodel.type.scwf_submitHelloWorldTask.description=Submit a workflow
that says hello in the log
scwf_workflowmodel.property.scwf_helloName.title=Name
scwf_workflowmodel.property.scwf_helloName.description=Say hello to this person

Listing 15: seWorldOwn properties for Hallo World III
```

Listing 15: scWorkflow.properties for Hello World UI

I tend to think of these properties as belonging to two groups. One group is the set of model-related properties. These properties externalize the strings in the workflow content model. The other is the set of process-related properties. These properties externalize the strings users see when they are working

with the process (the workflow title, the workflow history, etc.).

Alfresco has to be told about the properties file. I also need to tell it about the custom workflow model. The helloWorldUI workflow needs to be added to the list of workflows to be added as well. I'll update the someco-workflow-context.xml file I created earlier with:

```
props>
                   prop key="engineId">activiti</prop>
                   prop
key="location">alfresco/extension/workflows/helloWorldUI.bpmn20.xml
                   prop key="mimetype">text/xml</prop>
                   prop key="redeploy">false</prop>
               </props>
           </list>
       </property>
       property name="models">
           <t>>
               <value>alfresco/extension/model/scWorkflowModel.xml</value>
           </list>
       </property>
       property name="labels">
           st>
               <value>alfresco.extension.messages.scWorkflow</value>
           </list>
       </property>
   </bean>
```

Listing 16: Updating the workflow deployer bean to declare the workflow model and properties The helloWorldUI example is now ready to deploy.

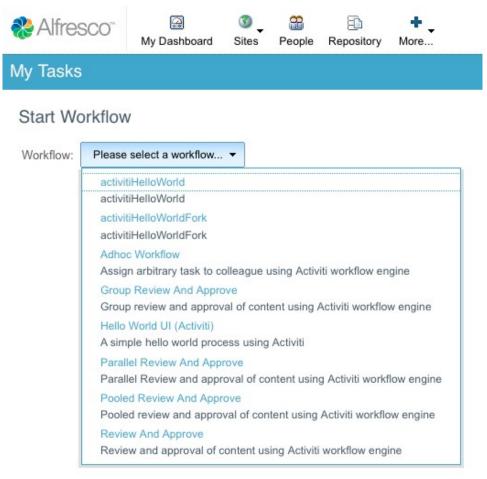
### Implementation summary

I've covered a lot of ground so far. The following summarizes the advanced workflow implementation steps:

- 1. Model the process using the Activiti Process Designer. Add logic using expressions, Alfresco JavaScript, or Java classes.
- 2. Define a workflow content model. If you use a new content model file, remember to update the Spring context XML file to point to the new content model definition XML file.
- 3. Update the appropriate web client configuration files (web-client-config-custom.xml and share-config-custom.xml) to expose workflow tasks to the Alfresco web client.
- 4. Create/update a workflow-specific properties file to externalize the strings in both the workflow model and the process definition.
- 5. Deploy the process definition using the workflow deployer Spring bean.

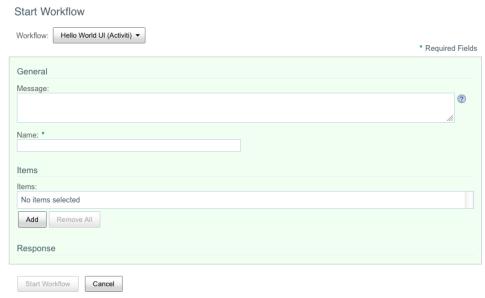
If you are following along, you can deploy using "ant deploy". After starting Tomcat, you be able to

log in and see the Hello World UI workflow in the list of workflows:



Drawing 13: Share workflow list shows custom workflows

And when you select the Hello World UI workflow, the greeting field should be displayed:



Drawing 14: Hello World UI: Start workflow form

After the workflow starts, you should see the greeting in the log:

```
2012-02-09 20:37:51,816 DEBUG [repo.jscript.ScriptLogger] [http-8080-70] Hello , Jeff!

Drawing 15: Hello World UI greeting in the log
```

After approving or rejecting the review task, you should see a log message showing which one you selected:

```
2012-02-09 20:38:37,200 DEBUG [repo.jscript.ScriptLogger] [http-8080-26] The outcome of the review task is: Approve

Drawing 16: Hello World UI approval result in the log
```

At this point you know enough about advanced workflows to be dangerous. Let's work through an example to put some of this new knowledge to work.

# Part 2: SomeCo Whitepaper submission example

This example continues the SomeCo example from the past several "Alfresco Developer Series" tutorials. SomeCo is going to use Advanced Workflows to route Whitepapers for approval before being flagged for publication on the web site. The next section describes the process.

### **Business process description**

Anyone that can log in to Alfresco can submit a whitepaper for publication on the web site. The only information the submitter needs to specify is the email address of an external third-party reviewer, if applicable. More on that shortly.

The whitepaper needs to be reviewed by the Engineering team as well as the Marketing team. It doesn't matter who on the team does the review—SomeCo wants to notify each team and then let one representative from each team "own" the review task. Either team can reject the whitepaper. If rejected, the person who submitted the whitepaper can make revisions and resubmit. If both teams approve, the whitepaper moves on to the next step.

Some whitepapers need to be reviewed by an external third-party. The third-party won't actually log in to Alfresco—they'll get an email and click a link to approve or reject the whitepaper. If the third-party doesn't do anything in a certain amount of time, the whitepaper should be automatically approved.

### High-level steps

Alright. We're going to implement this process in four major steps. Here's a look at the major steps and the respective sub-steps:

- 1. Implement the basic flow and workflow user interface
  - 1. Lay out the process using the Activiti Process Designer.
  - 2. Configure user tasks with appropriate assignments.
  - 3. Add decision logic.
  - 4. Implement the workflow content model, the workflow client configuration, and the workflow properties.
  - 5. Deploy and test.
- 2. Implement web scripts and actions for external third-party integration and other business logic
  - 1. Execute the "set web flag" action (created in an earlier tutorial) against every whitepaper in the workflow package. The action adds the "sc:webable" aspect to the whitepaper and sets the properties appropriately.
  - 2. Write a web script to handle approval/rejection via HTTP. The logic needs to grab the task and then set the outcome with the appropriate "approve" or "reject" flag.
  - 3. Write an Activiti taskListener Java class that sends a notification to the third-party email address.
  - 4. Deploy and test.
- 3. Add a timer to the third-party task



- 1. Add a timer to the Third Party Review task so that if the third party doesn't respond in a timely fashion the task will automatically approve.
- 2. Deploy and test.

Now that you know where we're headed at a high-level, let's get into the details.

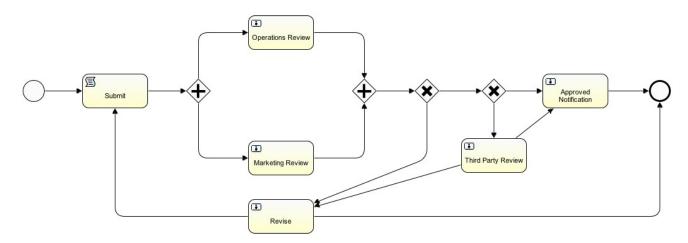
### Step 1: Implement the basic flow and workflow user interface

Just like in the Hello World examples, the first thing to do is diagram the process. Then, I'll assign tasks, add a bit of logic and establish the workflow content model before a quick deploy and test.

#### Layout the process

I'm going to place my workflow in a file called publishWhitepaper in the workflows folder alongside the previous examples.

Using the Activiti Process Designer, lay out the process as follows:



Drawing 17: Publish Whitepaper BPMN Diagram

Submit is a Script Task. The rest are User Tasks. I'm not using the Alfresco-specific events or tasks for any of these in this example, but feel free to do so in your own diagrams to save some typing.

### **Configure User Tasks with Assignments**

This table tells you how to set the performer type, expression, and form key on each task:

	Performer type	Expression	Form Key
Start Event	N/A	N/A	scwf:submitReviewTask
Operations Review	Candidate Groups	GROUP_Operations	scwf:activitiOperations Review
Marketing Review	Candidate Groups	GROUP_Marketing	Scwf:activitiMarketing Review
Revise	Assignee	\${initiator.properties.userName}	scwf:activitiRevise
Third-Party Review	Assignee	\${initiator.properties.userName}	scwf:activitiThirdParty Review
Approved Notification	Assignee	\${initiator.properties.userName}	scwf:activitiApprovedN otification

#### Add decision logic

At this point the .activiti file should save without a problem. Now it is time to switch to the BPMN XML and add some decision logic to the process.

The process definition has two decisions. One decision figures out if all required approvals have been obtained. If so, the process continues. If not, the initiator gets a chance to make revisions. The other decision is used to determine if a third-party review is required based on whether or not the initiator provided an email address.

These are pretty easy decisions to make based on process variables. For the "All Approved" decision, I will increment a counter when the process follows an "approve" sequence flow. If the counter is equal to 2, I know the package received both approvals.

I need to be careful to initialize the counter to 0 and the approved variable to false because it's possible that a whitepaper may go through several review cycles. The "Submit" node is a convenient place to do that:

Listing 17: Initializing the counter and approved variables

Now I need to increment the counter when the approve sequence flow is taken. Looking at the

Operations Review as an example, I can add some JavaScript that will run when the task completes to increment the counter:

```
<userTask id="usertask1" name="Operations Review"</pre>
activiti:candidateGroups="GROUP Operations"
activiti:formKey="scwf:activitiOperationsReview">
      <extensionElements>
        <activiti:taskListener event="complete"</pre>
class="org.alfresco.repo.workflow.activiti.tasklistener.ScriptTaskListener">
          <activiti:field name="script">
            <activiti:string>
            if(task.getVariableLocal('scwf approveRejectOutcome') == 'Approve') {
                var newApprovedCount = scwf_approveCount + 1;
                execution.setVariable('scwf approveCount', newApprovedCount);
            </activiti:string>
          </activiti:field>
        </activiti:taskListener>
      </extensionElements>
    </userTask>
```

Listing 18: Setting execution variables with the value of task variables

The code is identical for the Marketing Review, so I'll leave that out. With those two task listeners in place, I can add code to the decision that will choose the appropriate path based on the counter:

Listing 19: Conditionally taking a path depending on a variable value

For the "Third Party" decision I'll do something similar. In this case I'm going to check a user-provided value.

Listing 20: Conditionally performing the third-party review based on the presence of the email

There are two more places condition expressions are needed. One is on the two flows that leave Third Party Review. I want to go to the Approved Notification if the third-party approves and Revise if they do not:

*Listing 21: Sequence flow condition based on the value of the approved variable* 

Then, on the Revise user task, I want to go to the Submit script task if the initiator re-submits and the end if they decide to withdraw or abort their request:

Listing 22: Sequence flow condition based on the value of the resubmit variable

You may be thinking that my sequence flow ID's aren't very helpful. I agree. I'd love to use more descriptive ID's but the Activiti Process Designer plug-in always changes them back for some reason.

### Workflow content model, UI config, and localization

The process has been defined. It doesn't have all of the logic it will have eventually, but it has enough that I can step through all paths in the process.

The next step is to integrate the process with the Alfresco user interface by defining the content model and updating the client configuration.

In the earlier examples, I already created a workflow content model XML file and pointed to that as well as my message bundle in a Spring bean configuration. So the first thing I need to do is update the content model XML (scWorkflowModel.xml) with types and aspects specific to the publish whitepaper process.

```
</type>
        <type name="scwf:activitiMarketingReview">
            <parent>scwf:activitiReviewTask</parent>
        </type>
        <type name="scwf:activitiOperationsReview">
            <parent>scwf:activitiReviewTask</parent>
        </type>
        <type name="scwf:activitiThirdPartyReview">
            <parent>scwf:activitiReviewTask</parent>
        </type>
        <type name="scwf:activitiRevise">
            <parent>bpm:activitiOutcomeTask</parent>
            properties>
                cproperty name="scwf:reviseOutcome">
                    <type>d:text</type>
                    <default>Abort</default>
                    <constraints>
                        <constraint type="LIST">
                            <parameter name="allowedValues">
                                st>
                                    <value>Re-submit</value>
                                    <value>Abort</value>
                                </list>
                            </parameter>
                        </constraint>
                    </constraints>
                </property>
            </properties>
            <overrides>
                property name="bpm:packageItemActionGroup">
                    <default>edit_package_item_actions</default>
                </property>
                property name="bpm:outcomePropertyName">
                    <default>{http://www.someco.com/model/workflow/1.0}reviseOutcom
e</default>
                </property>
            </overrides>
        </type>
        <type name="scwf:activitiReviewTask">
            <parent>bpm:activitiOutcomeTask</parent>
            properties>
                property name="scwf:approveRejectOutcome">
                    <type>d:text</type>
                    <default>Reject</default>
                    <constraints>
```

```
<constraint type="LIST">
                            <parameter name="allowedValues">
                                st>
                                    <value>Approve</value>
                                    <value>Reject</value>
                                </list>
                            </parameter>
                        </constraint>
                    </constraints>
                </property>
            </properties>
            <overrides>
                property name="bpm:packageItemActionGroup">
                    <default>read package item actions</default>
                </property>
                property name="bpm:outcomePropertyName">
                    <default>{http://www.someco.com/model/workflow/1.0}approveRejec
tOutcome</default>
                </property>
            </overrides>
        <type name="scwf:activitiApprovedNotification">
            <parent>bpm:workflowTask</parent>
            <overrides>
                property name="bpm:packageItemActionGroup">
                    <default>read package item actions</default>
                </property>
            </overrides>
        </type>
```

Listing 23: Submit whitepaper workflow content model

There's one type for each task. The name of each type matches the form key of the user task.

You'll notice that each type inherits from a type defined in the BPM content model. If you look at the bpmModel.xml file you'll see that the bpm:startTask has helpful properties such as the workflow description, due date, and priority.

The bpm:workflowTask has an association called bpm:package. The bpm:package points to a bpm:workflowPackage which is the aspect applied to a container (like a folder) that holds the documents being routed through a workflow. When you write code that needs to access the content being routed in a workflow you can get to it through the bpm:package association.

The "bpm:packageItemActionGroup" defines what actions are available for working with the content in the workflow at that particular step in the process. In our case, I want the initiator to be able to change the contents of the workflow when the workflow is started and when making revisions, but I don't want the reviewers to be able to add or remove anything to or from the workflow.

The start task has a mandatory aspect called "scwf:thirdPartyReviewable". I'll define that aspect to

contain a property I can use to store the third-party reviewer's email address:

Listing 24: The third party reviewable aspect in the workflow content model

Now I need to tell Alfresco how to render the properties in the workflow model. You saw how to do this earlier. Alfresco Explorer is configured in web-client-config-custom.xml while Alfresco Share is configured in share-config-custom.xml. Because it is mostly repetitive, I'll just show the "scwf:activitiReviewTask" configuration for Alfresco Share here and if you want to see the Explorer configuration or the rest of the Share configuration, you can look at the source that accompanies this article.

```
<config evaluator="task-type" condition="scwf:activitiReviewTask">
    <forms>
        <form>
            <field-visibility>
                <show id="bpm:workflowDescription" />
                <show id="packageItems" />
                <show id="scwf:approveRejectOutcome" />
                <show id="transitions" />
            </field-visibility>
            <appearance>
                <set id="" appearance="title" label-id="workflow.set.general" />
                <set id="info" appearance=""</pre>
template="/org/alfresco/components/form/2-column-set.ftl" />
                <set id="assignee" appearance="title" label-</pre>
id="workflow.set.assignee" />
                <set id="items" appearance="title" label-id="workflow.set.items" />
                <set id="response" appearance="title" label-</pre>
id="workflow.set.response" />
                <field id="bpm:workflowDescription" label-
id="workflow.field.message">
template="/org/alfresco/components/form/controls/textarea.ftl">
                        <control-param name="style">width: 95%</control-param>
                    </control>
                <field id="packageItems" set="items" />
```

## ecmarchitect.com

Listing 25: Share configuration for the submit whitepaper process

Something that isn't immediately obvious without looking closely at the accompanying Share form configuration is that there are multiple workflow form configurations needed for a given workflow. This table can help you figure out what configuration does what:

For example, this configuration	Is used by Share to figure out
<pre><config condition="activiti\$publishWhitepaper" evaluator="string-compare"></config></pre>	What form to use when a workflow is started that has an ID matching the condition.
<pre><config condition="scwf:activitiReviewTask" evaluator="task-type"> <form></form></config></pre>	What form to use when someone manages a task with an activiti:formKey that matches the condition.
<pre><config condition="scwf:activitiReviewTask" evaluator="task-type"> <form id="workflow-details"></form></config></pre>	What form to use when someone opens the "Workflow Details" page (e.g., from Workflows I've Started) where the last completed task has an activiti:formKey that matches the condition.

The last step is to externalize the strings in the model and process. Remember that in the helloWorldUI example the strings went into scWorkflow.properties. So I'll add the publish whitepaper properties to that file. The first set of strings to add have to do with the process:

```
publishWhitepaper.workflow.title=Publish <u>Whitepaper</u> to Web (<u>Activiti</u>) publishWhitepaper.workflow.description=Review and approve <u>Someco Whitepaper</u> content using <u>Activiti</u>
```

Listing 26: Process-specific properties in scWorkflow.properties

Note that the first part of the property key matches the name I gave the process definition. The values for the workflow.title and workflow.description keys will be what the user sees when she clicks "Start Advanced Workflow" in the Alfresco web client.

The next set of properties are directly related to the workflow model:

```
scwf_workflowmodel.type.scwf_submitReviewTask.title=Start Someco Web Review scwf_workflowmodel.type.scwf_submitReviewTask.description=Submit Someco Web documents for review & approval to a group of people scwf_workflowmodel.type.scwf_activitiMarketingReview.title=Marketing Review scwf_workflowmodel.type.scwf_activitiMarketingReview.description=Review documents for impact on Someco marketing message
```

```
scwf workflowmodel.type.scwf activitiOperationsReview.title=Operations Review
scwf workflowmodel.type.scwf activitiOperationsReview.description=Review documents
for technical accuracy and best practices
scwf workflowmodel.type.scwf activitiThirdPartyReview.title=Third Party Review
scwf workflowmodel.type.scwf activitiThirdPartyReview.description=Obtain third
party approval
scwf workflowmodel.type.scwf activitiRevise.title=Revise
scwf workflowmodel.type.scwf activitiRevise.description=Make changes then resubmit
or abort
scwf workflowmodel.type.scwf activitiReviewTask.title=Review
scwf workflowmodel.type.scwf activitiReviewTask.description=Approve or reject this
scwf workflowmodel.property.scwf reviewerEmail.title=Reviewer email
scwf workflowmodel.property.scwf reviewerEmail.description=Third-party reviewer
email address
scwf workflowmodel.property.scwf approveRejectOutcome.title=Outcome
scwf workflowmodel.property.scwf approveRejectOutcome.description=Reviewer outcome
scwf_workflowmodel.property.scwf_reviseOutcome.title=Outcome
scwf workflowmodel.property.scwf reviseOutcome.description=Reviewer outcome
```

Listing 27: Workflow model-specific properties in scWorkflow.properties

The first part of the key is the name of the workflow model, then whether or not this key is for a type or a property, then the name of the type or property. These are the strings shown when someone manages a task.

#### **Deploy and test**

If you are following along, you can use "ant deploy" in both the repo project and the Share project to deploy the workflow, content model, and user interface config to the alfresco and Share WARs.

If you haven't done so already, create a group called "Operations" and a group called "Marketing" and place one or more test users in each group.

You should be able to create a piece of test content and then run through the workflow. It won't change the status of the whitepaper just yet, but at least it will verify that the tasks flow from one to another like you expect.

### Step 2: Implement web scripts and actions

Now that the base process is running and it's hooked in to the Alfresco UI, it's time to pimp it out with some business logic.

### Call the set-web-action in the Approved node

I'll work on the Approved node first because it's easy. When a whitepaper is approved I want to add the

"sc:webable" aspect to it and set the "isActive" and "published" properties. You may recall from the "Custom Actions" article that I already have an action that does this, so all I have to do is tell the process to execute it via Alfresco JavaScript:

```
<userTask id="usertask4" name="Approved Notification" activiti:assignee="$</pre>
{initiator.properties.userName}"
activiti:formKey="scwf:activitiApprovedNotification">
    <extensionElements>
        <activiti:taskListener event="create"</pre>
class="org.alfresco.repo.workflow.activiti.tasklistener.ScriptTaskListener">
            <activiti:field name="script">
                <activiti:string>
                var setWebFlaqAction = actions.create("set-web-flaq");
                setWebFlagAction.parameters["active"] = true;
                for (var i = 0; i < bpm package.children.length; i++) {
                  logger.log("Approving node:" + bpm package.children[i].nodeRef);
                  setWebFlagAction.execute(bpm package.children[i]);
                </activiti:string>
            </activiti:field>
        </activiti:taskListener>
    </extensionElements>
</userTask>
```

Listing 28: Executing an action for every document in the workflow package

This is a straightforward piece of Alfresco JavaScript that executes the custom action called "set-web-flag" for every piece of content in the workflow package. The action adds the aspect and sets the properties appropriately.

That's all that's needed to handle the approval. Now for the Third Party Review.

### Implement the external third-party review

Activiti may have an out-of-the-box mechanism for exposing business processes to external parties. I'm porting my jBPM third-party review, so, honestly, I didn't spend much time investigating whether it would work for my use case or not.

In my example, I'm rolling my own notification and third-party approval using the out-of-the-box mail action and web scripts. There are two pieces required to make this work. The first piece is some Java code that will send an email to the third party with "approve" and "reject" links in the email body. The recipient will open their email and click on either the approve link or the reject link. This won't require logging in to Alfresco at all. The second part is a web script that gets called when the recipient clicks the links. The web script will get a handle to the workflow task and set the outcome appropriately.

This may seem backwards, but I'll build the web script that handles the links first, then I'll build an Activiti task listener class that sends the email notification.

#### Implement the Web Script

I've covered the Web Script Framework in a previous tutorial (See "More Information") so let me just show you the Java class that acts as the web script controller. Here's the executeImpl() method:

```
protected Map<String, Object> executeImpl(WebScriptRequest req, Status status) {
    final String id = req.getParameter("id");
    final String action = req.getParameter("action");

    if (id == null || action == null) {
        status.setCode(400);
        status.setMessage("Required data has not been provided");
        status.setRedirect(true);
    }

    Map<String, Object> model = new HashMap<String, Object>();
    Map<QName, Serializable> props = new HashMap<QName, Serializable>();

    props.put(QName.createQName(SomeCoModel.NAMESPACE_SOMECO_WORKFLOW_CONTENT_MODE
L, SomeCoModel.PROP_APPROVE_REJECT_OUTCOME), action);
    workflowService.updateTask(id, props, null, null);
    workflowService.endTask(id, action);
    return model;
}
```

Listing 29: Java-based web script controller used to handle mail-based reviewers

The class grabs the task ID and the action to take (the outcome) and then uses the workflow service to update and end the task. So, for example, if someone were to post this URL:

http://localhost:8080/alfresco/service/someco/bpm/review?id=activiti\$89&action=Approve

the Java class would update the task identified by activiti\$89 with the "Approve" outcome<sup>3</sup>.

#### Create a custom task listener

The second piece to the Third Party Review is sending the email to the third-party. There is an out-of-the-box mail action, and you've already seen how to call an action from a workflow using Alfresco JavaScript, but there are a few things to take care of other than simply sending an email, so I'll write a custom task listener class to handle it.

I'll create a new class called com.someco.bpm.ExternalReviewNotification that implements TaskListener. I need to build an email that has two links—one for approve and one for reject—that represent the two possible outcomes of the Third Party Review user task. The links need to include the task ID and the desired outcome as arguments.

<sup>3</sup> The web script configuration that maps the URL to the controller and view resides in alfresco/extension/templates/webscripts/com/someco/bpm. The controller class is com.someco.scripts.GetReview.

The task listener's notify method will be called by Activiti. Here is what the method looks like:

```
public void notify(DelegateTask task) {
   String recipient = (String)
task.getVariable(ExternalReviewNotification. RECIP PROCESS VARIABLE);
   StringBuffer sb = new StringBuffer();
    sb.append("You have been assigned to a task named ");
    sb.append(task.getName());
   sb.append(". Take the appropriate action by clicking one of the links
below:\r\n\r\n");
   sb.append(getLink(task.getId(), "Approve"));
    sb.append(getLink(task.getId(), "Reject"));
   ActionService actionService = getServiceRegistry().getActionService();
   Action mailAction = actionService.createAction(MailActionExecuter.NAME);
   mailAction.setParameterValue (MailActionExecuter. PARAM SUBJECT,
ExternalReviewNotification.SUBJECT);
   mailAction.setParameterValue(MailActionExecuter.PARAM TO, recipient);
   mailAction.setParameterValue (MailActionExecuter. PARAM FROM,
ExternalReviewNotification. FROM ADDRESS);
   mailAction.setParameterValue(MailActionExecuter.PARAM TEXT, sb.toString());
   actionService.executeAction(mailAction, null);
   return;
```

Listing 30: Custom Activiti task listener used to send the email notification

The first thing the method does is grab the recipient from a process variable. Next, I start building the message body with a string buffer. The task.getName() call grabs the node name ("Third Party Review").

In the jBPM version of this code, rather than hardcode the outcomes, "Approve" and "Reject", I iterate over the leaving transitions. To do that here, I think I'd have to use the Dictionary Service to look up the constraints on that outcome variable.

The getLink() call is just a helper method that produces a link that looks like this:

```
http://localhost:8080/alfresco/service/someco/bpm/review?
id=activiti$999&action=Approve&guest=true
```

Listing 31: Example link that will be included in the notification email

The method has the host and port hardcoded which is another thing you'd want to fix if you did this for real.

The last major block of code uses the action service to execute the Alfresco mail action. Sure, you could use the Java mail API to do it yourself, but why not leverage the mail action? That way you can leverage the same SMTP configuration settings already configured for Alfresco in alfresco-global.properties.

The last thing I have to do is tell the process about the task listener, so I'll update the Third Party Review user task as follows:

Listing 32: Declaring the custom task listener within the process

Now the process will send an email to a third-party reviewer if an email address is specified, the third-party reviewer can click on the appropriate outcome link which will trigger a web script causing the workflow to continue along the right path, and if the whitepaper is ultimately approved, the workflow will invoke the "set web flag" action to set its properties so it can be searched for and displayed on a web site.

#### **Deploy and test**

It's time to deploy and test. If you want to try out the notification piece, you'll need access to an SMTP server. For developing and testing locally, Apache James works great. Remember to edit alfrescoglobal.properties to set your outgoing email settings to match your environment.

If all goes well, you should get an email that looks like this:



You have been assigned to a task named Third Party Review. Take the appropriate action by clicking one of the links below:

 $\underline{http://localhost:8080/alfresco/service/someco/bpm/review?id=activiti\$5461\&action=Approve\&guest=true}$ 

http://localhost:8080/alfresco/service/someco/bpm/review?id=activiti\$5461&action=Reject&quest=true

Drawing 18: Third Party Reviewer notification email

If you click on a link, it should cause the workflow to proceed along the specified path.

#### Warning: The Third Party example is *not* production-ready

I included the third-party example to show one type of wait-state/asynchronous behavior in a process.

It's got a long way to go before it can be used in production. A short list list of obvious issues includes:

- The email recipient doesn't get a copy of the documents being reviewed. One way to address this would be to have the notification action send a zip of the documents in the workflow package. Another way would be to write additional web scripts or send them a download link. I simply didn't have time to implement this and figured it was a bit off-topic anyway.
- It'd be really easy for an unauthorized person to signal any node in the system because my controller class doesn't do any validation whatsoever and the task ID's are trivial. In real life, you'd want to check that (1) the person making the request is the person assigned to the task, (2) that the task is still active, and (3) possibly use an additional security mechanism like a shared secret of some kind.
- The email body should probably come from a Freemarker template. That way you could reuse the notification class in any number of processes and it simplifies email body maintenance.

So, long story short, feel free to use this idea, but realize that I've cut corners for brevity's sake.

#### Step 3: Add a timer to the third-party task

What if you sent an email to the third party and they never took action? One way to handle that problem is with a timer.

One way to do this is to add a boundary timer to the Third Party Review task. When the timer expires, the timer can cancel the Third Party Review task and then route to the Approved task. To implement this, I added the following to my process definition:

Listing 33: Adding a boundary timer and sequence flow to the publish whitepaper process

Note that if you are following along, your task IDs may be different than mine, so pay attention that the "attachedToRef" attribute of the "boundaryEvent" element is pointing to the ID of the Third Party Review task and that the "targetRef" attribute of the "sequenceFlow" element is pointing to the Approved Notification task.

I've got the timer set for 5 minutes—that's what the "PT5M" expression means--but you could obviously set it for as long or as short as you wish. That expression is part of the ISO 8601 standard for durations.

Setting an absolute date works as well. The due date could also be the result of an expression. To use a specific date instead of a duration, use a "timeDate" element instead of a "timeDuration" element.

#### **Deploy and test**

Adding a timer doesn't require a restart. Just redeploy the process using the workflow console then start a new workflow. When the timer expires, the process should continue as if someone signaled the "approve" transition.

#### **Conclusion**

You should now know the ins and outs of implementing advanced workflows using the Activiti engine embedded within Alfresco. You know when Alfresco's basic workflows will suffice and when advanced workflows are more appropriate. I showed you that process definitions are collections of events, tasks, and gateways joined by sequence flows. The representation of a process definition, both as a diagram, and as XML, is standardized through BPMN. And, you now know how to add business logic to workflows using expressions, Alfresco JavaScript and Java.

I also walked you through the overall process of implementing advanced workflows in Alfresco by walking through some simple Hello World examples and then a more complex example that used many different node types and business logic options. I even spiced things up a bit by exposing the business process to a third-party via SMTP and HTTP with the help of the web script framework.

Hopefully, this has sparked some ideas about how you can leverage Alfresco and Activiti in your own projects and has given you some concrete examples you can leverage in your own projects going forward.

### Deploying and testing

To deploy the sample code included with this article, all you have to do is:

- 1. Unzip the advanced-workflow-article.zip file.
- 2. Import the advanced-worklfow-article-repo-project.zip file into Eclipse. (Or just expand it on your file system).
- 3. Change build properties to match your environment.
- 4. Run "ant deploy".
- 5. Import the advanced-workflow-article-share-project.zip file into Eclipse. (Or just expand it on your file system).
- 6. Change build properties to match your environment.
- 7. Run "ant deploy".

The deploy Ant task in each project will compile all necessary code, JAR it up, zip up the JAR and the extensions into the appropriate folder structure, and then unzip on top of the Alfresco and Share web roots which deploys the custom model, Spring config files, web client customizations, scripts, web

scripts, and all other assets to the appropriate directories.

In case you are curious, my environment is:

- Mac OS X Lion 10.7.2
- MySQL 5.1.61 (Macports)
- Tomcat 6.0.32
- Java 1.6.0 29
- Alfresco 4.0.d Community, WAR-only distribution
- Activiti Eclipse BPMN 2.0 Designer 5.7.1
- Eclipse Helios Service Release 2
- Apache James 2.3.1 (for testing third-party notification via SMTP)

Obviously, other operating systems, databases, and application servers will work as well. Activiti just became available as an embedded workflow engine with Alfresco 4. If you are running a release older than Alfresco 4, you should read the first edition of this tutorial to see the same examples running with jBPM.

#### Where to find more information

- The complete source code that accompanies this article is available <a href="here">here</a> from ecmarchitect.com.
- You may also enjoy previous articles in the Alfresco Developer Series at ecmarchitect.com:
  - "Working with Custom Content Types, 2nd Edition", January, 2012.
  - "Developing Custom Actions, 2nd Edition", January, 2012.
  - "Intro to the Web Script Framework", October, 2007.
  - "Implementing Custom Behaviors", September, 2007.
- Alfresco wiki and docs pages related to this topic:
  - Workflow Architecture page on docs.alfresco.com
  - Alfresco JavaScript API wiki page
  - For deployment help, see <u>Packaging and Deploying Extensions</u> in the Alfresco wiki.
  - For general development help, see the Developer Guide.
  - For help customizing the data dictionary, see the <u>Data Dictionary</u> wiki page.
- Activiti and BPMN
  - The Activiti home page has documentation and tutorials.
  - Archived Activiti Process Designer installation bundles live <u>here</u>.
  - Ask questions about Activiti embedded within Alfresco in the Workflow forum.
  - OMG hosts <u>bpmn.org</u>, which is where the <u>BPMN 2.0 spec</u> lives as well as the <u>BPMN by Example</u> document.



#### About the author



Jeff Potts is the Chief Community Officer for Alfresco Software. Jeff has been a recognized and award-winning leader in the Alfresco community for many years. He has over 18 years of content management and collaboration experience, most of that having come from senior leadership positions in consulting organizations.

Jeff has made many contributions to the Alfresco community since he started working with Alfresco in 2005. Examples range from code, to tutorials and informative blog posts, to code camps, meetups, and conference sessions. In 2008, Jeff wrote the Alfresco Developer Guide, the first developer-focused book on Alfresco. He has also been active in the Apache Chemistry project where he leads the development of cmislib, the Python API for CMIS.

Read more at Jeff's blog, ecmarchitect.com.