TIBCO iProcess® Modeler

Getting Started

Version 11.10.0 | May 2025

Contents

Introduction

This section gives an overview of how to define procedures and explains the components of iProcess Suite you need to use.

TIBCO iProcess Workspace (Windows)

The TIBCO iProcess Workspace (Windows) is the single focal point for defining and managing procedures. The TIBCO iProcess Workspace (Windows) consists of:

- The Work Queue Manager
- The Procedure Manager

The Work Queue Manager displays users' queues and work items and the Procedure Manager displays all of the procedures currently available. From the Procedure Manager, you can do the following activities:

- create and edit procedures. The TIBCO iProcess Modeler is started from the TIBCO iProcess Workspace (Windows).
- organize and manage your procedures as a hierarchical structure of procedure libraries, in the same way as, for example, you manage files and directories.

TIBCO iProcess Modeler

TIBCO iProcess Modeler's one primary objective is to make the analysis and documentation of business processes as simple and intuitive as possible. It is aimed at a non-technical audience and gives you a visual representation of your business process that is easy to follow and that can be enhanced or amended at any time. TIBCO iProcess Modeler builds on the familiar flowchart metaphor to show in an unambiguous manner, the flow of work for a particular business process. The rules that you define graphically are stored by the iProcess Engine node and can then be deployed across a wide ranging hardware architecture.

TIBCO iProcess Modeler is automatically started by TIBCO iProcess Workspace (Windows) when you want to create or edit procedures. From TIBCO iProcess Modeler you can access **Step Definer**, which enables you to design the forms for each step in your procedure. The forms are the part of the step seen by the person who receives the work item in their queue. The forms contain text and fields into which users can enter information for a particular case, or instance, of a procedure. Fields can also display information already provided or can hold information calculated by the procedure.

Note: The 11.9.0 version introduces significant UI improvements for TIBCO iProcess Modeler that changes the Step editing paradigm from a Dialog Open/Save click intensive model to a Property sheet approach, where whenever you select a step, you can view the step properties in a pane at the bottom of the page to edit or view.

- As you switch between steps, you can see various properties of that step.
- When a step is not selected, or if you are moving a step(s), the property pane is hidden to give you maximum screen space for that operation.
- While this change has moved few things and grouped them slightly differently, all the tabs are similar as before, to keep familiarity.
- Step Priority now has its own dedicated tab, **Priority**, rather than being part of the **Status** tab. The new **Options** tab brings together various options that were earlier present on different tabs.
- There are also some improved features like spinners on the **Deadlines** tab and improved elastic search capability for Queue, Field, and Role addressees.

Defining Procedures

Procedures are at the very heart of iProcess Suite operations, and, as a procedure or process definer, your role is vital to the successful use of iProcess Suite. You can decide how to translate manual procedures and paper documents into iProcess procedures and forms. In turn, you can also use the iProcess Suite to generate custom software applications designed to meet the specific needs of your organization.

As a procedure definer, you must have a basic understanding of how the iProcess Suite works. Since you are designing forms for both users and managers, you might want to know how the iProcess Suite looks from their perspectives.

In brief, the iProcess Suite works by integrating electronic mail with the management of text, forms, and data. It constructs messages, memos, letters, or complex documents with text and blanks to be filled in and routes them to the appropriate individuals according to the rules that you establish.

By definition, an iProcess procedure is a series of **steps** that accomplish a task. Each step consists of five possible parts:

- An **addressee** (user, group, or role)
- A **form** the addressee receives
- An **action** that takes place after the addressee completes the form
- A **deadline** by which the addressee must complete the form
- The **duration** between the step being active and released.

The flow of the procedure (from one step to the next) is controlled by a series of **conditions** and **actions** that you specify. An iProcess step could be compared to sending a blank or partially filled in form, or a memo that requests information; and then, on the basis of that information, deciding what to do next to accomplish the overall goal.

As a procedure definer, you work closely with the iProcess system administrator, the person who is responsible for maintaining all central iProcess data, including **users** and **groups**, **attributes**, **roles**, **lists**, and **tables**.

You can use users, groups, and roles when you define addressees. You can use attributes, lists, and tables when you define the forms the addressees receive.

Regardless of the type of system you use, all work that you do as a procedure definer is stored in a special work space set aside for this purpose. You can create and test procedures in a realistic environment without affecting the iProcess Suite's normal operations. When you are satisfied that your procedure accomplishes its goal, you can **Release** the procedure and make it available to other iProcess users.

Overview of Creating a Procedure

The process of creating an iProcess procedure can be divided into five steps:

1. *Decide where the procedure should be stored in your procedure management hierarchy*. Procedures can be stored in procedure libraries which you can use to

organize your procedure objects.

2. *Plan the procedure*. This involves studying the manual procedure and breaking it down into its components. These will be the steps in your iProcess procedure. This process also involves identifying addressees and designing forms.
3. *Create the steps that make up the procedure*. This includes fully defining addressees, forms, actions, and deadlines.
4. *Test and edit the procedure until it accomplishes its goals*. During the testing process, which will emulate actual cases of your procedure, you will be able to see what your procedure users will see when they access their work queues. The editing process uses exactly the same options as creating a procedure does to refine and adjust the new procedure.
5. *Release the procedure for general use*. Even after you release your procedure you will remain the procedure owner on record, with the ability to make changes if necessary and to respond to exceptional cases.

Getting Started

This tutorial covers the basics of defining a procedure using Procedure Manager, iProcess Modeler, and Step Definer. It takes approximately one hour to complete. After completing this tutorial, you can perform the following tasks:

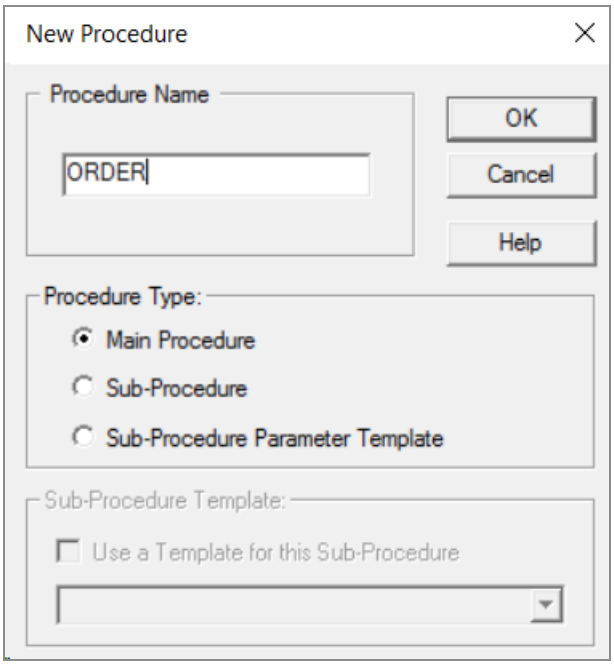
Defining the Procedure

This section describes how to define a simple two-step procedure. It covers the following topics:

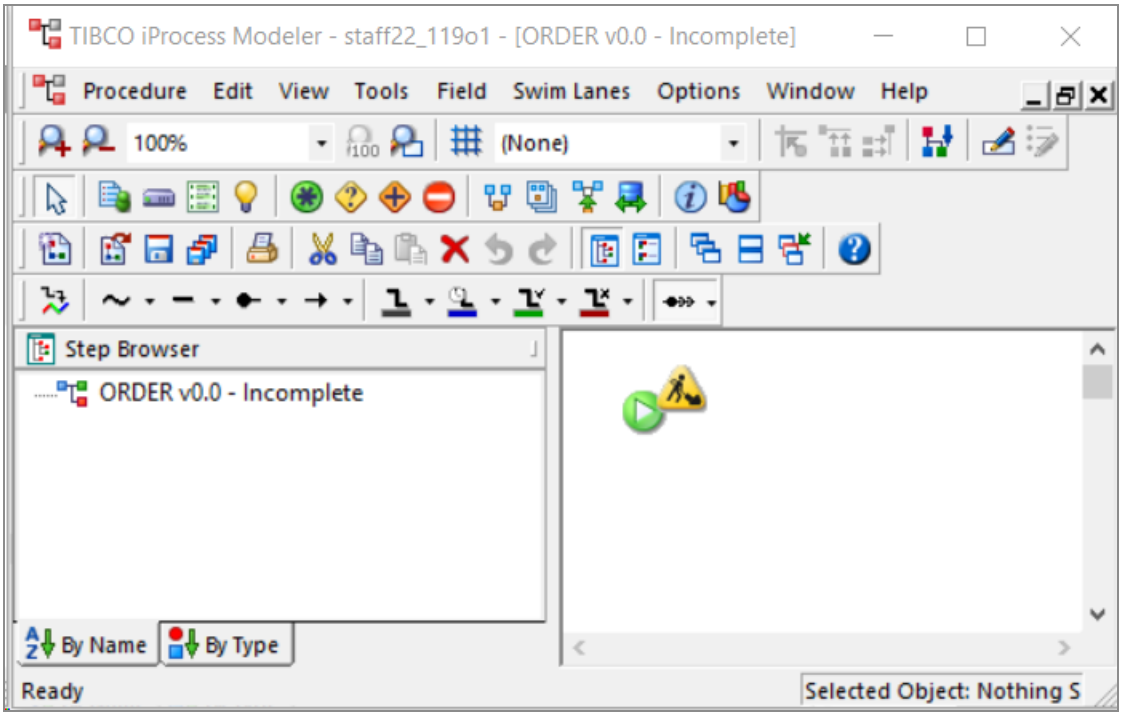
Creating a Procedure

To create a new procedure, do the following:

1. From the **Procedure Manager** window, double-click the **Procedure Management** library. The list of available libraries is displayed.
2. Navigate to the library where you want to create the new procedure.
3. Click **Procedure Management** > **New Procedure**. The **New Procedure** dialog is displayed.



4. Type `ORDER` in the **Procedure Name** field.
5. Ensure that **Main Procedure** is selected as the Procedure Type.
6. Click **OK**. A **Process Definer** window is started.



Defining a Step

This section describes how to define the first step of the procedure.

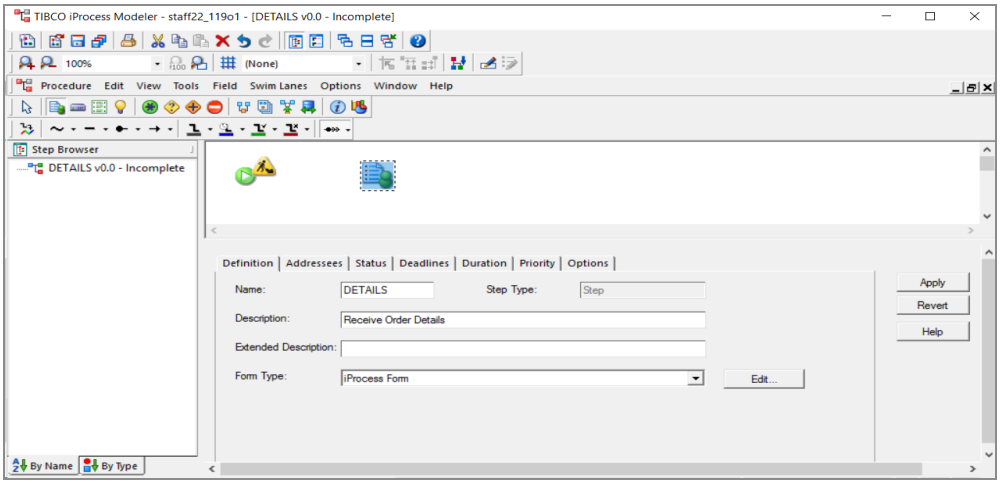
1. Click the **Step** tool on the toolbar to select it, position the pointer where you want the step to appear (typically, just to the right of the **Start** icon) and click to place the step.

   The Properties pane is displayed at the bottom.

2. Enter the **Name** of the step.

   In this example use the name **DETAILS**. It doesn't matter if you use lower or upper case for the name as iProcess automatically converts it to upper case. The name can be a maximum of 8 characters with no spaces.

3. Enter the **Description**, which can be up to 24 characters. Describe this step as **Receive Order Details**. The description remains in lower or upper case just as you type it.

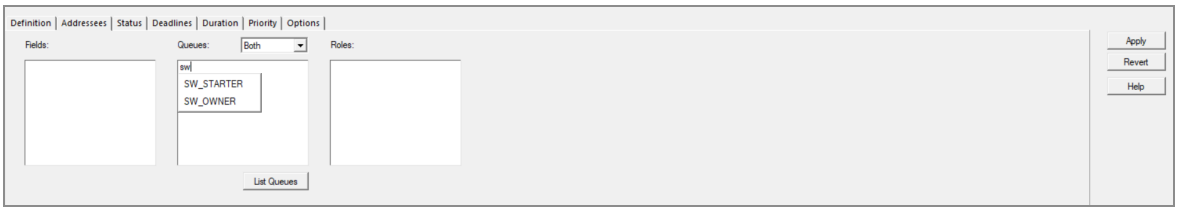


4. Click the **Addressees** tab. Every step must have an Addressee. An Addressee is the queue that receives this step when a case of the procedure is run.

   There are three ways to specify who the addressee(s) of a step should be - Fields, Queues, and Roles. These are all covered in depth in "Defining a Procedure" in the *TIBCO iProcess® Modeler Basic Design* guide. But, for this example, you only need the **Queues** column. Under the **Queues** column, you can enter the name of the queue (either a user or group) that must receive this step.

   By default, the **Queues** drop-down displays **Both** (users and groups). However, you can select the option to display only **Users** or **Groups**.

Also, the controls support an "elastic" search capability that is, when you enter an addressee, you start typing the name of a Queue, Field, or a Role, a list of possible matches are displayed. You can highlight the one you require and select it to add it.



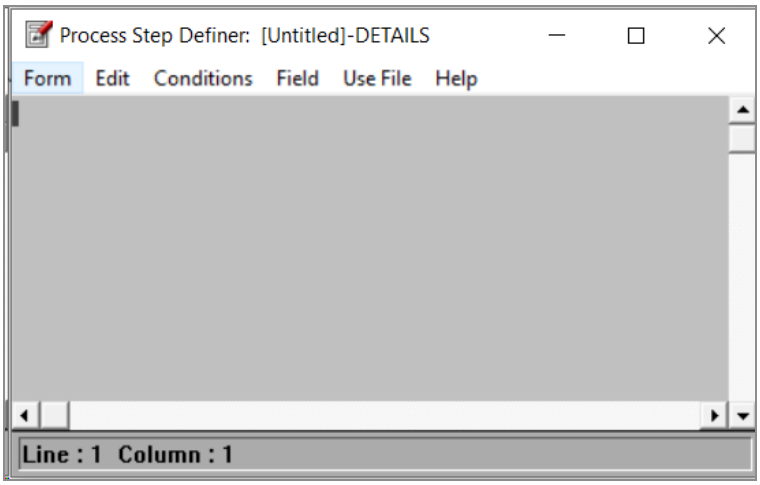
5. Enter your own iProcess user name and click the **Definition** tab to return to the Properties pane. Click **Apply**.

> **Note:** To be designated as an addressee, you must be a valid iProcess user or group. Users and groups are added in User Manager in TIBCO iProcess Administrator. See "Managing Users" in *TIBCO iProcess Workspace (Windows) Manager's Guide*.

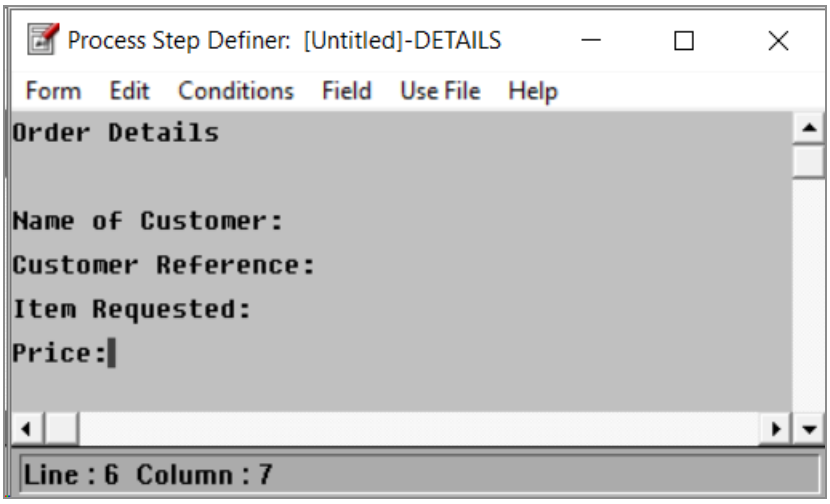
Defining the Form

The next stage is to design the form for the step. The form is what appears at runtime when the work item is selected from a queue or, if it is the first step in the procedure, when a case is started. A form can contain text and also fields where the user can enter information.

1. Click **Edit** in the iProcess Form section from the Properties pane. The **Process Step Definer** window is displayed.



2. Enter the following text on the form:



Defining Fields

As you want the user of the procedure to enter the customer name, you must define a field that they can type into when they are filling in the form. To do this activity, perform the following steps:

1. Click **Field** > **Define...** The **Field Definition** dialog is displayed.
2. In the **Field Name** box, type **Customer**. This is the name of your first field.

> **Note:** Field names can be up to 15 characters long and can contain letters, digits, and underscore characters but they must start with a letter. Field names are converted to uppercase irrespective of how they are originally entered.

All of the different field types are discussed in detail in “Creating Fields and Forms” in the TIBCO iProcess® Modeler Basic Design guide.

3. For the **Customer** field, keep the default field type of **Text**.
4. To change the field length, click in the **Length** box at the bottom of the window and change the value from *20* to *30*.
5. Click **Add**. The field details you entered are saved and you can define another field.
6. Define three more fields:

   — A text field called Custref with a length of 12.

   — A text field called Item with a length of 25.

   — A numeric field called Price. The length of Price should be 8 with 2 decimal places.

   > **Note:** The length of a numeric field includes the decimal point and decimal places. For example, a length of 8 gives us 00000.00.

7. Click **OK** when you have finished adding fields. You can always add more fields later if you need to.

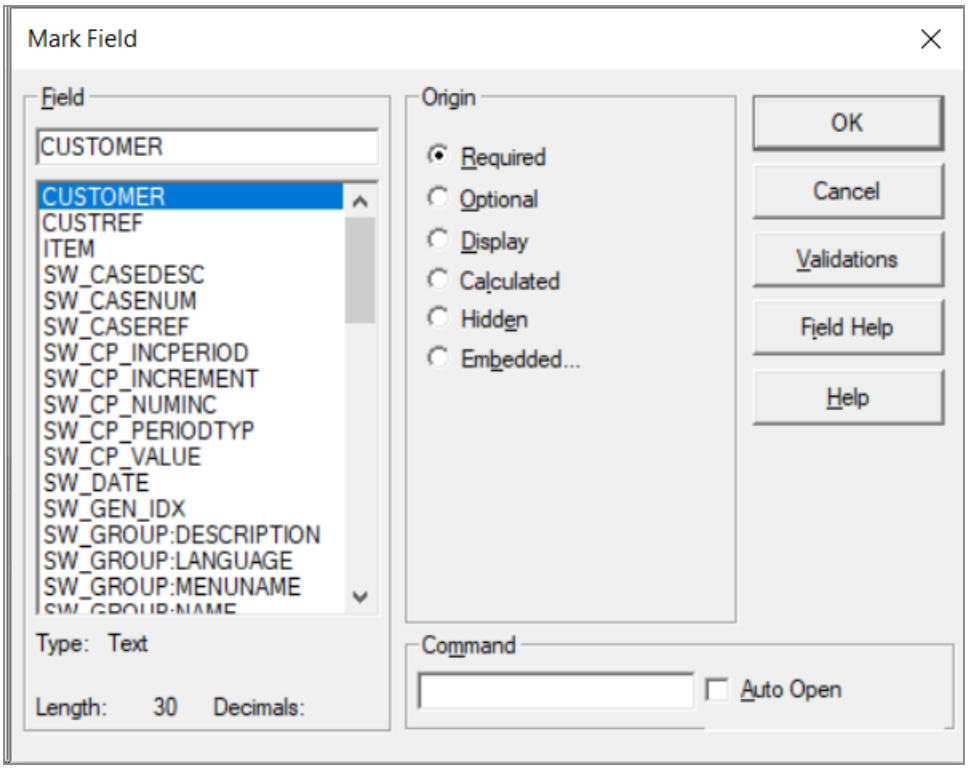
Inserting Fields into the Form

You can now place the fields you have defined on the form. To do this activity, perform the following steps:

1. Place the cursor a few spaces after the text **Name of Customer**:

   > **Note:** You can use TAB and SPACE to move the cursor to the position on the line where you want the field to start.

2. Click **Field > Insert**. The **Mark Field** dialog is displayed.



3. Click **Customer** from the **Field** list.
4. Click **Required** for the field's **Origin**.

   The **Origin** of a field defines how the field is going to be used in the form. The following table explains the different types of origins and their meaning.

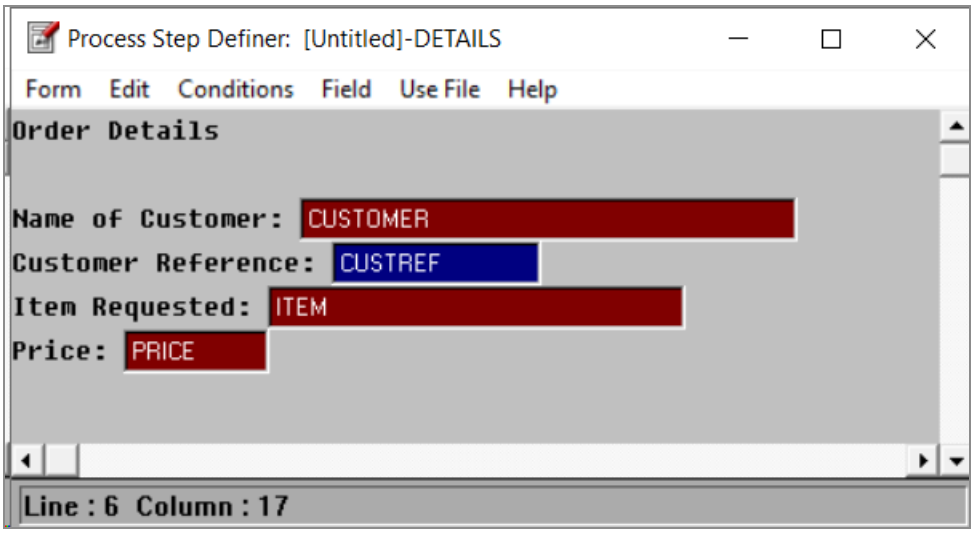
Origin	Meaning
Required	The user must fill in this field. If a Required field is not completed the form cannot be released. In TIBCO iProcess Workspace (Windows) required fields appear on the form in red.
Optional	The user can enter information into this field but does not have to. The form can be released without an optional field being filled in. Optional fields appear in blue (white at runtime).
Display	The current value for the field is displayed in the form but it cannot be changed.

Origin	Meaning
Calculated	A value for the field is calculated and displayed based on a specified calculation. For more information on using field calculations, see “Controlling Data Input on Forms” in the *TIBCO iProcess® Modeler Basic Design* guide.
Hidden	A value is calculated but not displayed in the form. For more information on using field calculations, see “Controlling Data Input on Forms” in the *TIBCO iProcess® Modeler Basic Design* guide.
Embedded	Displays the value of the field (but not any remaining spaces up to the length of the field). This origin is often used in letters as at run-time it appears as part of the form body rather than a field. For more information on using embedded and ampersanded fields, see “Controlling Data Input on Forms” in the *TIBCO iProcess® Modeler Basic Design* guide.

5. Click **OK**. The field is displayed at the cursor position.
6. Repeat this for the rest of the fields:

Field	Origin
Custref	Optional
Item	Required
Price	Required

7. Your form must look like the following image.



Tip: If you can't see the field names, go to **Form > Setup > Show Field** names.

Saving the Form

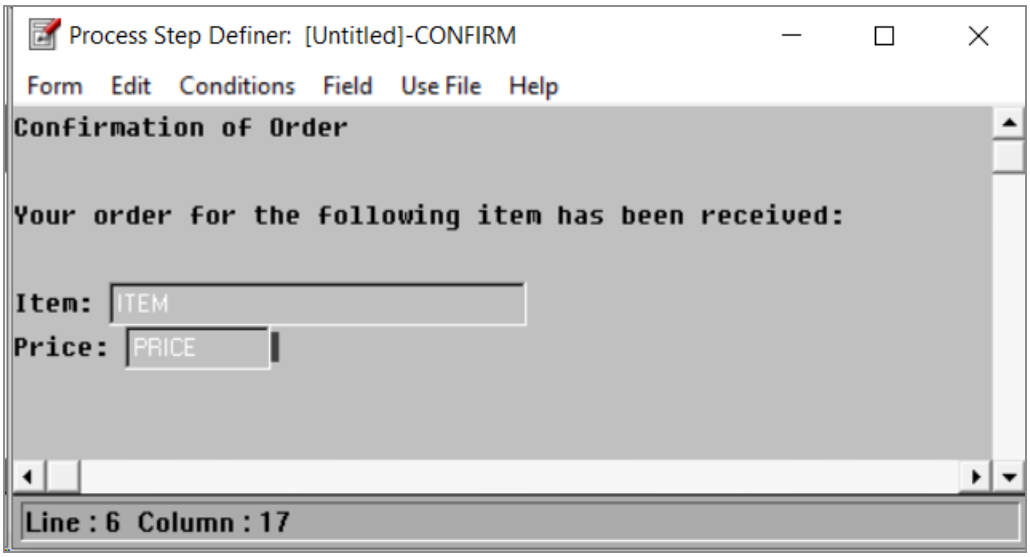
It is important to save your form at regular intervals to ensure that you don't lose any of your work in the event of a power failure or other problem:

1. Click **Form** > **Save Changes**. The form is saved.
2. Click **Form** > **Exit** to close the **Step Definer** and return to the iProcess Modeler.

Creating a Second Step

Now that your first step is complete, you can create a second step.

1. Following the steps described in Defining a Step, create a step using a step name of **CONFIRM** and a description of **Confirmation of Order**. For the Addressee, choose the name of a colleague who is a user on the iProcess system.
2. In the form, enter the following text:



3. Insert the two fields, **Item** and **Price**, after the text Item and Price, but this time choose the origin as **Display** (for more information about inserting fields, see "Creating Fields and Forms" in the *TIBCO iProcess® Modeler Basic Design* guide). **Display** can be used on this step as the value for these fields are entered in the previous step.
4. Save and exit the form to return to the iProcess Modeler.

Linking Steps

After creating the two steps for your procedure as explained in previous sections, you must link them by defining the order in which they should be processed.

Before you begin

You need to create at least two steps to create a link in a procedure. To define a procedure, perform the following steps.

1. Defining a Step
2. Defining the Form
3. Creating a Second Step

To create a link between the two steps, perform the following steps:

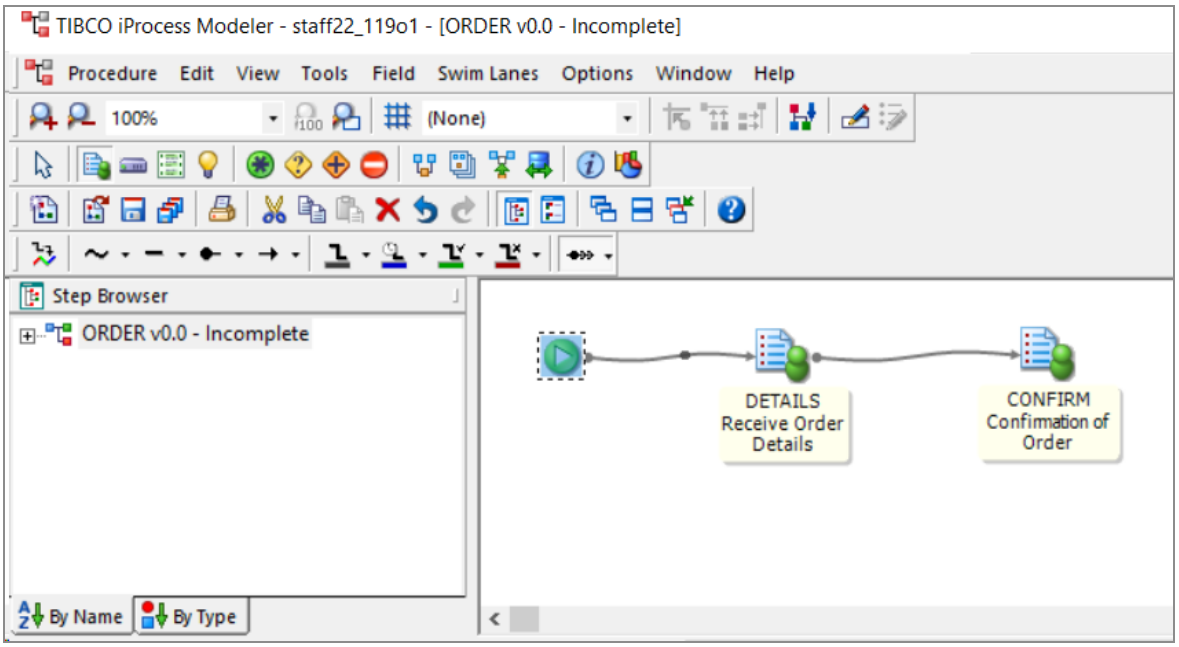
Procedure

1. To create a link from the **Start** icon to the first step, hover your mouse over the start icon. Click the link tool and drag it to create connection to the left side of the first step **DETAILS**. This creates a Normal link.

   Note:
   - To move a link, hover the mouse over the link at a position where it displays **Click-Drag to move link's cap**, and then drag the cursor to the step where you need to move the link.
   - When you drag the mouse to create a link, as per the position of the cursor, it displays the following updated description:
     - **Start-Release Action**
     - **Right-click to add Router**
     - **Process-step action**
     - **Click-Drag to move link's cap**

       For more details about the cursor description at each position, refer *TIBCO iProcess® Modeler Basic Design* guide.

2. To create a link between the two steps, hover your mouse over the first step **DETAILS**, the link tool is displayed. Click the link tool from the right side of **DETAILS** and drag it to create connection to the left side of the second step **CONFIRM**.



When you link the two steps, the second one becomes an action that is carried out when the first step is released. For more information on linking objects, see "Defining a Procedure" in the *TIBCO iProcess® Modeler Basic Design* guide.

Note:

- You can drag and drop a step between two existing step objects.
- The system creates two new links when you add a step between two existing step objects.
- To change the direction of the connection links, press the Alt key.

What to do next

You save the procedure by performing the steps in Saving the Procedure. You can also test the procedure by performing the steps in Testing a Procedure.

Deleting a Link

If you create a link in the wrong place, for example, connecting to the top or bottom of an icon, it can have a different meaning (for more information on linking objects, see “Defining a Procedure” in the *TIBCO iProcess® Modeler Basic Design* guide). You can delete any link by selecting the line then pressing the **Delete** key.

Moving Steps

You can move the steps in your procedure by selecting the step or steps, then dragging and dropping the steps to a new position on the iProcess Modeler layout. Any links to other steps are automatically re-drawn.

Saving the Procedure

Perform the following steps to save your procedure.

1. From the iProcess Modeler, click **Procedure** > **Save** or click  .
2. If the **Save Comment** dialog is displayed, enter a comment describing the reason why the procedure has been created.

Closing TIBCO iProcess Modeler

When you are ready to close iProcess Modeler, click **Procedure** > **Exit**. If you have a procedure open that you have made changes to, you are prompted if you might want to save the procedure.

Checking the Procedure Status

Every procedure has a status depending on its stage of development and working life. From the **Procedure Manager**, the Procedure Details list in the right hand side of the window shows the procedure objects in the currently selected library. By default, the **Status** of each object in the library is displayed. If you navigate to the library that contains your procedure, you can see that the status of the procedure is **Unreleased**.

Icon Image	Name (Description)	Type	Status	Amended	Usage Instructions
	ORDER	Procedure	Unreleased	12/04/2022 00:57	

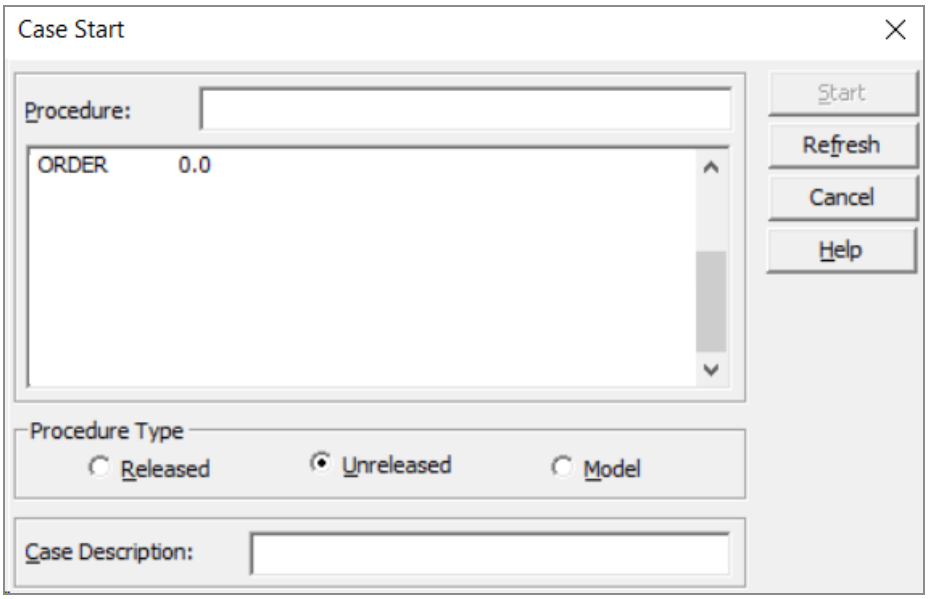
When you first define a procedure it is only available to you, the procedure definer, as it is under development. When you run a case of an unreleased procedure, all work items go to test queues that belong to you. For more information, see Testing a Procedure.

Note: The iProcess Administrator user has access to all procedures irrespective of who owns them.

Testing a Procedure

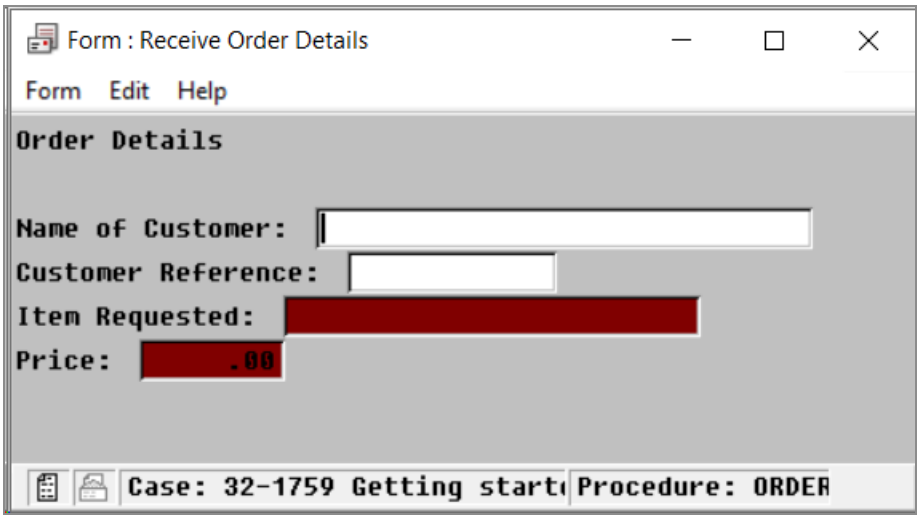
Now that you have a complete two-step procedure, you need to test it to ensure that it is correct before releasing it for other iProcess users to use.

1. From **Work Queue Manager**, click the **Case Start** button .
2. The **Case Start** dialog is displayed. In the **Procedure Type** section of the dialog, select **Unreleased**. All available procedures of that type are listed (along with the version number).

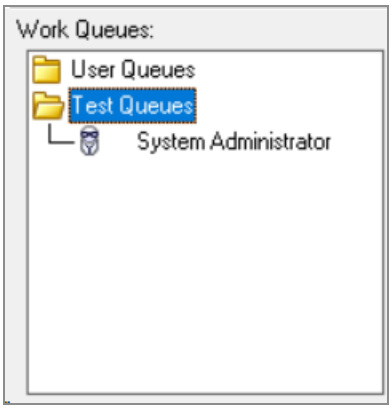


3. Click the **ORDER** procedure and enter a **Case Description**. The Case Description is used to identify the case and is usually displayed in the Work Queue Manager.
4. Click **Start**.

   The form of the first step is displayed for you to complete and release.



This step also appears in your work queue in the **Test Queues** folder.



You can click the **Rebuild List** button, or click **Rebuild Queues List** from the **Queues** menu, to see your test queues.

As your procedure is unreleased, all the work items related to the procedure go to your test queues. The test queues are named after the addressee of the step.

> **Note:** Test queues are completely separate from your own work queue containing work items from released procedures. Test queues are not visible to any other users.

5. Enter information into the fields in the first step, then release it by double clicking the release icon in the lower left corner of the form.

> **Note:** The release icon is not available until you have filled in all required fields.

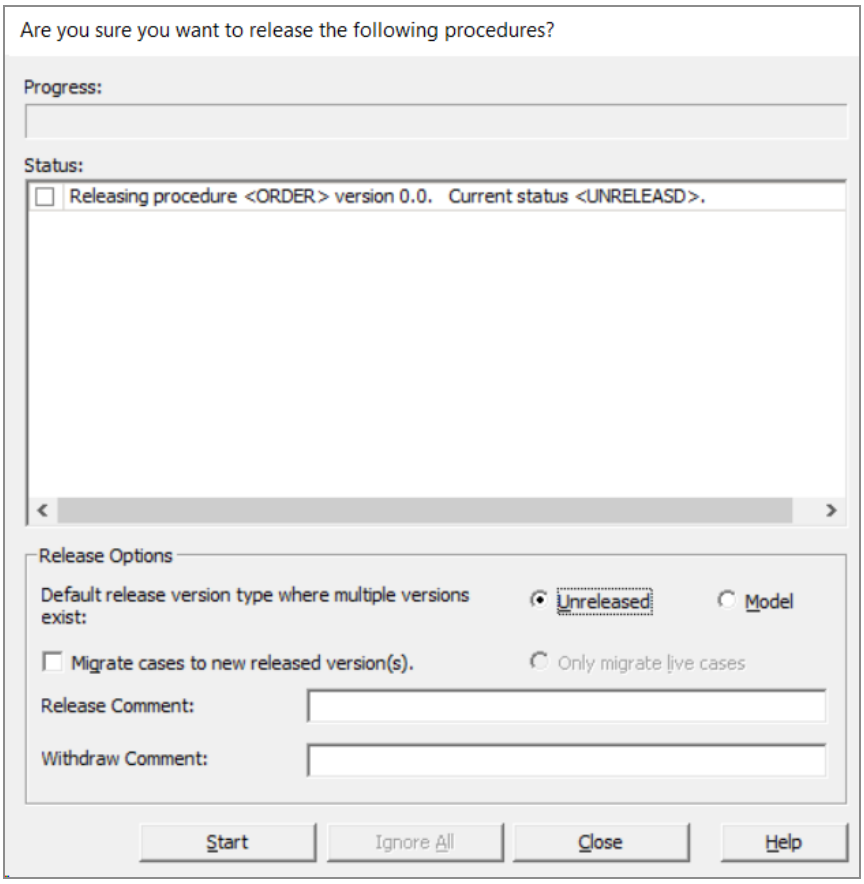
6. The **Work Queue** now shows a second test queue that contains the second step of your procedure.

   You can open the **Work Item** and release it straight away as there are no input fields on the form.

Releasing a Procedure

Once you have tested your procedure and have verified that it works correctly (for example, that the forms look the way you want them, that the steps go to the correct addressees, that the information being collected is shown correctly), you can return to the Procedure Manager and release the procedure.

1. In the Procedure Manager, select the **ORDER** procedure.
2. Click **Procedure Management** > **Release Procedure**. A dialog is displayed showing the procedures and versions that can be released and withdrawn if you continue.



3. Enter a **Release Comment** describing why the procedure is being released.
4. Click **Start**. The progress meter shows the progress of the operation, and a tick appears next to the procedure as it is released.
5. Click **Close** to close the dialog when the procedure has been released.

Your procedure is now available to all iProcess users on this iProcess installation.

Where To Find More Information On Defining Procedures

You can find more information about defining procedures from the following guides.

- The *TIBCO iProcess® Modeler Basic Design* guide explains basic procedure design including:

  - the types of procedure objects that can be placed in a procedure and how to link them together.
  - creating fields and forms that can be attached to a step.
  - performing calculations on fields.
  - defining a deadline in a procedure.
  - setting up a condition so that a branch in the process flow can be added.
  - defining a withdraw action so that a step can be withdrawn from the work queue if it is no longer required.
  - defining a wait in a procedure.
  - making procedures easier to follow.
  - customizing the Process Definer.
  - troubleshooting procedure definitions.
- The *TIBCO iProcess® Modeler Advanced Design* guide explains more complex procedure definition design including:
  - defining sub-procedures.
  - defining sub-procedure calls.
  - the use of array fields which are used in conjunction with dynamic sub-procedures and graft steps.
  - creating templates for use with dynamic sub-procedure calls and graft steps.
  - defining a dynamic call to multiple sub-procedures.
  - using scripts.
  - using case prediction.
  - setting priorities and escalating work items.
- The *TIBCO iProcess® Modeler Procedure Management* guide explains how to manage your libraries and procedures including:
  - managing procedures, libraries and shortcuts.
  - managing procedure versions.
  - setting and/or viewing properties, access controls and status information for different types of procedure objects.

- The *TIBCO iProcess® Modeler Integration Techniques* guide explains how to integrate your procedure with other external applications such as databases or custom applications including:
  - an introduction to the iProcess Suite's integration layers and the integration options available.
  - using EAI steps in your procedures to control updates to external systems and iProcess case data under transactional control.
  - how to set up graft steps so that external applications can dynamically start sub-procedures and "graft" them to the main procedure at run-time.
  - how to define public and event steps that can be published by external applications.
  - how to use an external form application in place of the iProcess Modeler's own form window for one or more steps of a procedure.
  - how to open a form window for any step of a procedure without starting or accessing a case.
  - how to set up event steps so that an action occurs when a particular event happens.
  - how you can create reports on iProcess case data and then view them using a third party data viewer application.
  - the types of command you can use to help integrate iProcess with your applications. For example, you can use a command to run an external program.

TIBCO Documentation and Support Services

For information about this product, you can read the documentation, contact TIBCO Support, and join TIBCO Community.

How to Access TIBCO Documentation

Documentation for TIBCO products is available on the Product Documentation website, mainly in HTML and PDF formats.

The Product Documentation website is updated frequently and is more current than any other documentation included with the product.

Product-Specific Documentation

The following documentation for this product is available on the TIBCO iProcess® Workspace (Windows) Product Documentation page:

Other TIBCO Product Documentation

When working with TIBCO iProcess® Modeler, you may find it useful to read the documentation of the following TIBCO products:

- TIBCO ActiveMatrix BusinessWorks™
- TIBCO Business Studio™
- TIBCO Enterprise Message Service™
- TIBCO Hawk®
- TIBCO Rendezvous®

How to Contact Support for TIBCO Products

You can contact the Support team in the following ways:

- To access the Support Knowledge Base and getting personalized content about

products you are interested in, visit our product Support website.

- To create a Support case, you must have a valid maintenance or support contract with a Cloud Software Group entity. You also need a username and password to log in to the product Support website. If you do not have a username, you can request one by clicking **Register** on the website.

How to Join TIBCO Community

TIBCO Community is the official channel for TIBCO customers, partners, and employee subject matter experts to share and access their collective experience. TIBCO Community offers access to Q&A forums, product wikis, and best practices. It also offers access to extensions, adapters, solution accelerators, and tools that extend and enable customers to gain full value from TIBCO products. In addition, users can submit and vote on feature requests from within the TIBCO Ideas Portal. For a free registration, go to TIBCO Community.

Legal and Third-Party Notices

Cloud SG software may be available on multiple operating systems. However, not all operating system platforms for a specific software version are released at the same time. See the “readme” file for the availability of a specific version of Cloud SG software on a specific operating system platform.