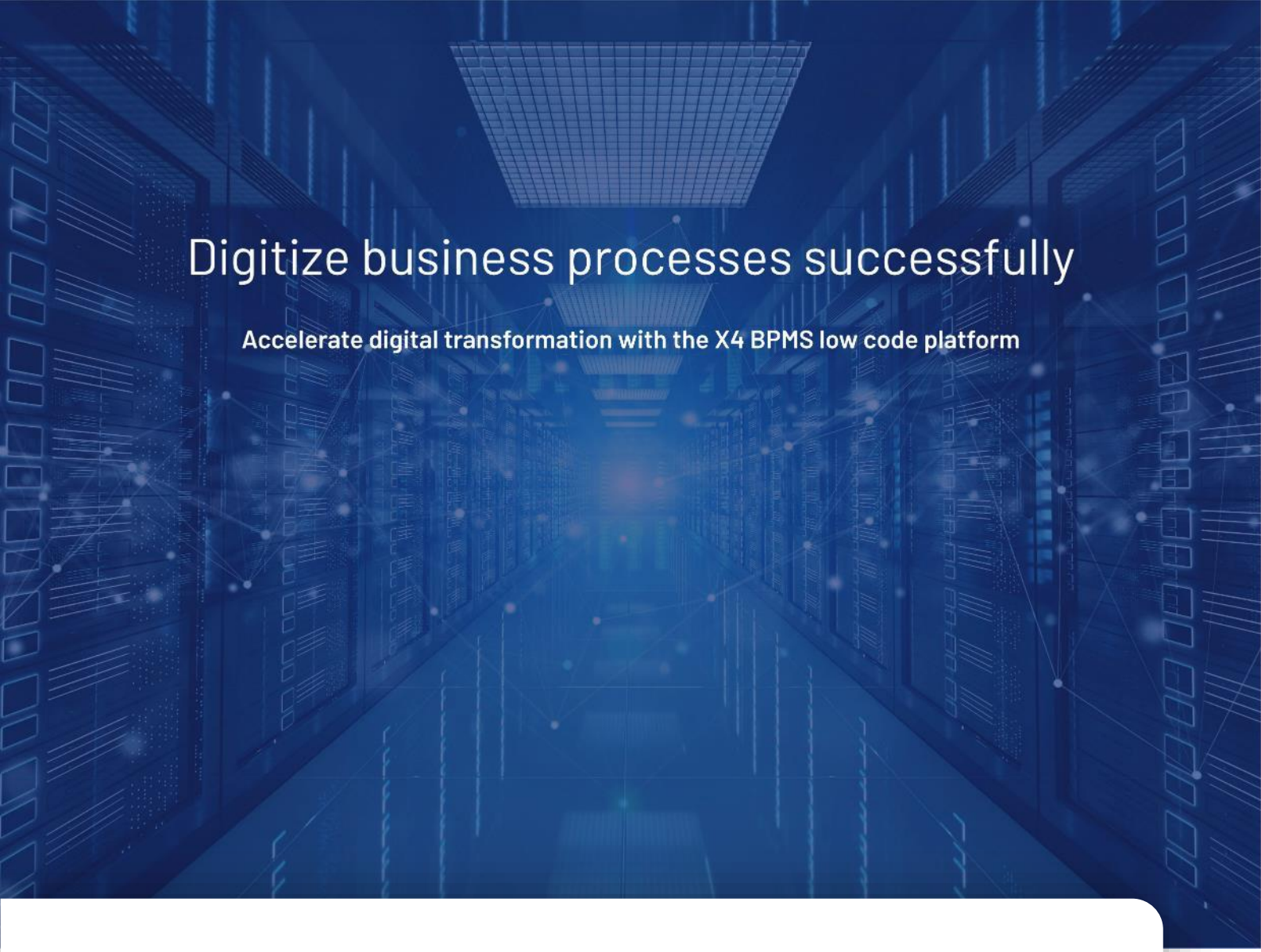

Getting Started with the X4 BPMS

SoftProject

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Table of Contents

Introduction 1
X4 Server 1
X4 Designer 1
Keycloak 1
Getting Started with the X4 Designer 3
Establishing a Connection to the X4 Server 3
Starting the X4 Server in the Console 3
Starting the X4 Server as a Windows Service 4
Connecting the X4 Designer with the X4 Server 4
Installing a License 5
Creating a New Project 5
Loading Sample Projects 6
Importing a Project 7
Exporting a Project 8
Additional Informationen 9

Introduction

This guide is designed to help you get started and make your first steps with the X4 BPMS (Business Process Modeling Software) as easy as possible. You will find general information about the X4 BPMS in this document and learn how to create your first projects. For a general overview of the X4 BPMS, please visit the SoftProject website at www.softproject.de/en/x4-bpms.

The installation of the X4 BPMS consists of three components:

- **X4 Server** – administration and process control in the background
- **X4 Designer** – graphical user interface
- **Keycloak** – user and role management system

X4 Server

The X4 Server constitutes the core part of the X4 BPMS. As a central component of the X4 BPMS architecture, the X4 Server is the central repository for projects and business processes on the one hand. On the other, it is responsible for the execution and control of all processes.

> **!** Without a connection to the X4 Server the X4 Designer cannot be fully used as the X4 Server controls the background processes required for the usage of the X4 Designer.

X4 Designer

As a built-in developer tool, the X4 Designer constitutes the graphical user interface of the X4 BPMS. The X4 Designer can be used to model business processes based on BPMN 2.0 (Business Process Model and Notation) and business rules based on DMN 1.1 (Decision Model and Notation). The X4 Designer can be used to create processes graphically via drag-and-drop. Furthermore, the user is provided with suitable input screens which can be used to configure the individual process components.

Keycloak

The X4 BPMS uses the open-source solution Keycloak for the user and role management. Keycloak serves as identity and access management solution, protects the X4 BPMS from unauthorized access and allows the creation of various users and user groups with different privileges and roles.
In order to use the X4 BPMS, Keycloak must be installed and running.

> **!** To use this guide, it is assumed that you have already successfully installed all three installation components of the X4 BPMS (X4 Server, X4 Designer and Keycloak) in compliance with the system requirements.
>
> You will find more information in the Document tab of the Download section of the SoftProject website at www.softproject.de/en/downloads:
>
> - **X4 BPMS System Requirements**: This document contains the system requirements for an installation of the X4 BPMS.

- **X4 BPMS Installation Guide**: This document contains all the information you need to have about the installation under different operating systems.

Getting Started with the X4 Designer

This chapter guides you through your fist steps with the X4 Designer and covers the following topics:

- Establishing a connection to the X4 Server
- Installing a license
- Creating a new project
- Loading a sample project
- Importing a project
- Exporting a project

Establishing a Connection to the X4 Server

Starting the X4 Server in the Console

Prerequisite

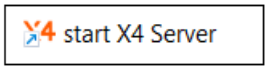
The X4 Server and the Keycloak have been installed.

Instructions

Navigate to your X4 installation folder.

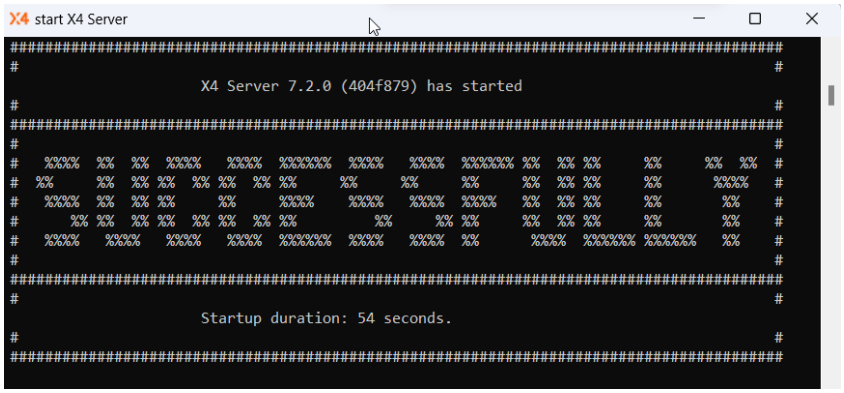
To start the Keycloak, double-click the **start Keycloak** shortcut:

To start the X4 server, double-click the **start X4 Server** shortcut:



> If you have checked the **Create desktop icon for X4 Server, X4 Designer** checkbox during the installation, you can also start the X4 Server by clicking the shortcut on your desktop.

Please wait until the SUCCESSFULLY message is displayed in the **start X4 Server** window:



If this message appears, the X4 Server has been started successfully and is ready to use.

Starting the X4 Server as a Windows Service

Prerequisite

The X4 Server was installed as a Windows service. To do so, check the **Install X4 Server as Service** checkbox during the installation.

Instructions

Open the **Services** Windows app. To do so, search for "Services" in the Windows search field, and open the app.
The Services dialog displays a list of all Windows services running on your system. In this list, you will also find the **X4Server** and **X4AuthentificationProvider** services.
Check the status of these services:
Running means that the X4 Server and the authentication provider are running in the background and are ready to use.
If the **Status** column is empty, select a service and choose the option to start the service. The service will be started and is ready for use after a short load time.

Connecting the X4 Designer with the X4 Server

Prerequisites

The X4 Server has been started.
Keycloak has been started.

Instructions

Double-click the **X4 Designer** shortcut in the X4 installation folder or on your desktop:

Click the icon in the X4 Designer toolbar to connect the X4 Designer with the X4 Server. If no connection has been established yet, this icon is the only icon in the toolbar.
The X4 Designer is connected to the X4 Server now.
If you have not installed a license file yet, you will be prompted to install a valid license.

Installing a License

Prerequisites

The X4 Server has been started.
Keycloak has been started.

Instructions

Click the icon in the X4 Designer toolbar.
If you have not installed a license yet, a dialog opens.
Click **Install license…**.
Select you X4 license file, and choose **Open**.
Ihre X4 Lizenz ist nun installiert. Sie sehen in der Statusleiste am unteren Rand des Bildschirms, wie lange Ihre aktuelle Lizenz gültig ist.

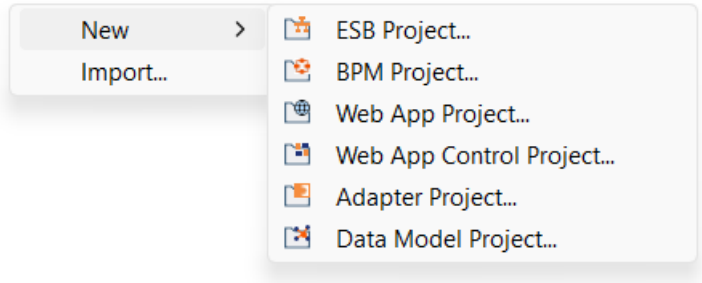
Creating a New Project

Prerequisite

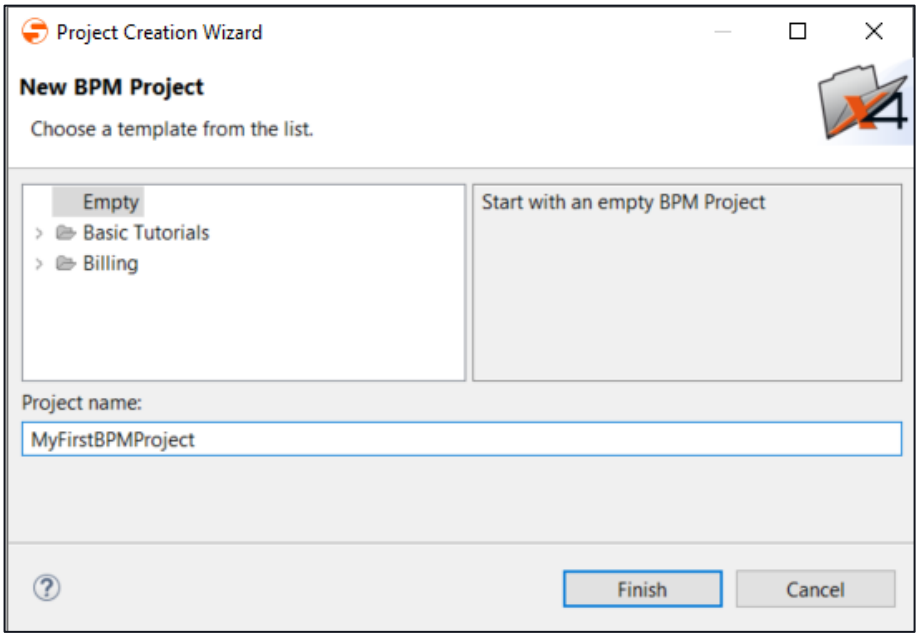
The X4 Designer is connected with the X4 Server.

Instructions

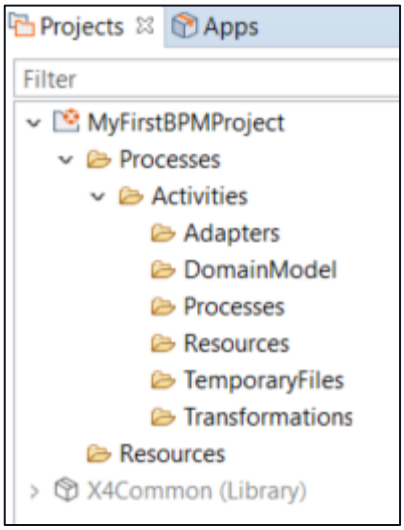
Right-click into the **Projects** view.
Choose **New** and select the desired project type.



The **Project Creation Wizard** dialog opens.



Enter a name for your project into the **Project name** text box.
Choose **Finish**.
Your new project has been created, and you can see the project structure in the **Projects** view.



Loading Sample Projects

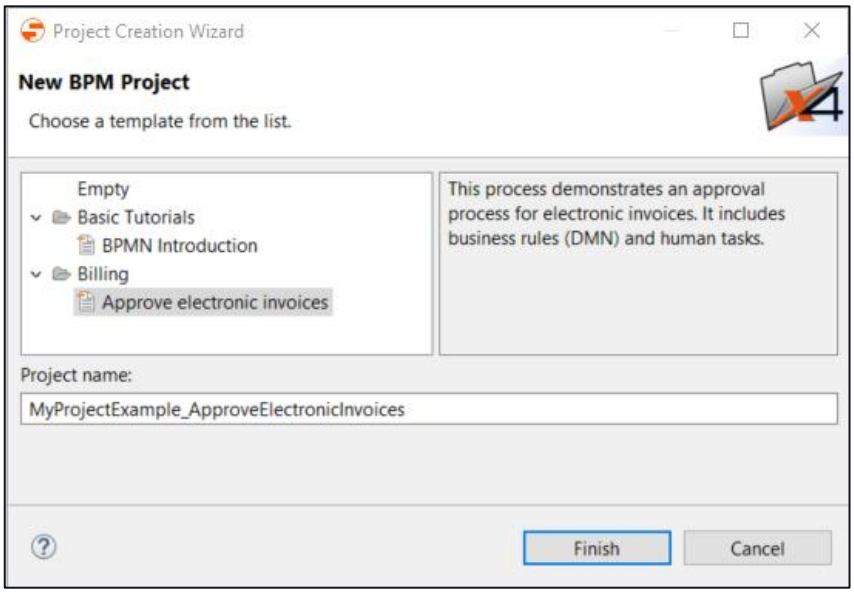
Prerequisite

The X4 Designer is connected to the X4 Server.

Instructions

Right-click into the **Projects** view.
Choose **New** and select the desired project type.
The **Project Creation Wizard** opens.

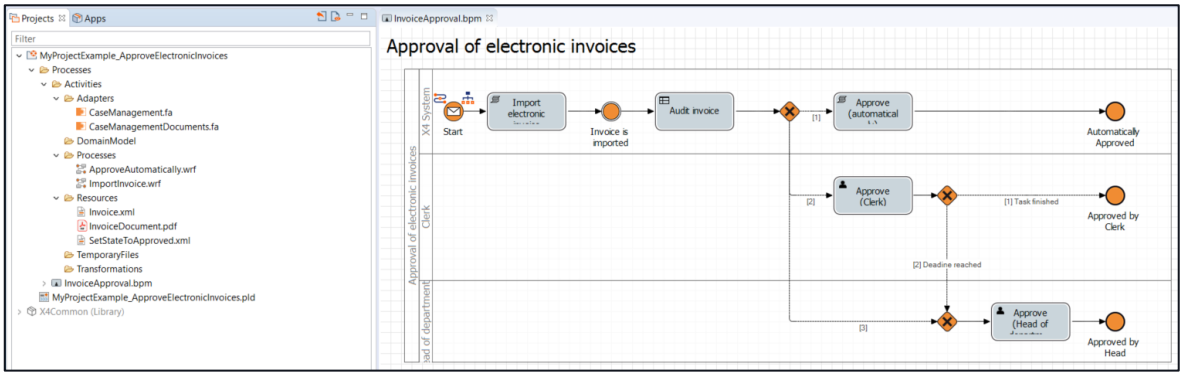
Choose a sample project from the available templates. The text box on the right provides detailed information about the content of the template.



Enter a name for your sample project into the **Project name** text box.

Choose **Finish**.

The sample project selected was created.



Importing a Project

Prerequisite

The **X4 Designer** is connected to the **X4 Server**.

Instructions

Right-click into the **Projects** view.

Choose **Import…**.

Choose **Browse…** in the **Resource Import Wizard** dialog and select the project (.zip) to be imported.

Change the project name, if desired, and choose **Finish**.

The project you selected was imported.

Exporting a Project

Prerequisites

The X4 Designer is connected to the X4 Server.
The **Projects** view contains at least one project.

Instructions

Right-click into the **Projects** view.
Choose **Export…**.
Select the target folder where you would like to save the exported project.
Choose **Save**.
The project you selected (.zip) was exported.

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Additional Information

SoftProject Academy

We offer tailor-made qualifications for beginners as well as for advanced users – as online seminars or classroom training in our in-house training center. Most trainings build on each other, however, they offer an introduction for experienced users of the X4 BPMS at any time.

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For more information on our training offers, please visit https://softproject.de/de/softproject/academy/.

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