IBM Enterprise Records 5.1: Automate Declaration

(Course code F182)

Student Exercises

ERC 1.0

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Unit 1. IBM Enterprise Records 5.1: Automate Declaration

Unit overview

Lessons

Skill levels

Select one of these skill levels to perform the activities.

- Challenge: Minimal guidance
- Walkthrough: More guidance, with step-by-step directions

Requirements

The activities in this unit assume that you have access to the student system configured for these activities.

Unit dependencies

The lesson activities in this unit must be performed in the given order.

Lesson 1.1. Declare records with event subscriptions

Overview

Why is this lesson important?

A personnel officer is required to submit a form containing employee personal information when a new employee joins the company. The company wants these forms declared as records. Your must create an event subscription that automatically declares these personnel forms as records whenever the documents are added to the object store.

Activities

- Create an event action and subscription to declare a record: Challenge, page 1-5
- Create an event action and subscription to declare a record: Walkthrough, page 1-9

User accounts

Type	User ID	Password
Administrator	Administrator	filenet
IBM WebSphere administrative console	Administrator	filenet

Note

Passwords are always case-sensitive.

Create an event action and subscription to declare a record: Challenge

Challenge

Use the data in the following tables to complete this lesson.

- Create an event subscription to automatically declare an *employee record* type of record when a user adds an Employee document.
- Add a filter to the record declaration subscription to limit record declaration to declaration of the first major or first minor version of the document.

Data

Use this data throughout this activity.

Object Store	Class	Object
RDOS1	Employee	Document
FPOS1	employee record	Record

Use this task information and the following data tables to create a declaration subscription.

Declaration task	Notes
Create declaration properties on RDOS	• `recordClassSymName` • `recordFileInFolder` • Use the data in the following, associated table.
Add declaration properties to document class	• Add properties to document class on RDOS. • Clear Hidden check box on the More tab.
Import RMAutoDeclare event action to RDOS	• Click Actions > All Tasks > Import All. • Accept default values for all other values not included in the data tables.
Add declare configuration properties to the RMAutoDeclare.properties file on RDOS	• Use WordPad. • Use the data in the following, associated table. • Delete the space after the default record class name when you replace it with the variable name.
Create a subscription for record declaration	• Subscription name: `DeclareEmployeeRecord` • Use the data in the following, associated table.
Test the record declaration	• Use Administrator account that has RM access.
Add filter expression	• Test original and changed declaration results. • Add filter in the following, associated table.

Use this data to create the properties for configuration of record declaration.

Property name	Type	Length	Value
recordClassSymName	String	64	<Leave blank.>
recordFileInFolder	String	256	<Leave blank.>

Use this data to import the code for the Records Manager event actions.

Prompt	Value
Import manifest file	C:\Documents and Settings\Administrator\Desktop \Infosphere enterprise records\IER install\Events \RMAutoDeclareImport.xml
External content path	C:\Documents and Settings\Administrator\Desktop \Infosphere enterprise records\IER install\Events\lib

Use this data to edit the RMAutoDeclare.properties file with WordPad.

Variable	Value
RecordClassPropertySymname	recordClassSymName
RecordFiledInFolderPropertySymname	recordFileInFolder
TargetObjectStoreName	FPOS1

Use this data to create a subscription.

Subscription Type	Subscription name	Action	Event Type
Record declaration	DeclareEmployeeRecord	RMAutoDeclare	Checkin

Use this expression in the Configuration tab of the record declaration subscription.

Filter Expression
MajorVersionNumber=0 AND MinorVersionNumber=1 OR MajorVersionNumber=1 AND MinorVersionNumber=0

Verification

- Add a new Employee document to the RDOS1 > Human Resources > Employee folder.
- Verify that an employee record was declared and that the Document Title from the document is the same as the Title of the record object.

- Check out the new Employee document and check in a minor version of the document.
- Verify that a second employee record is **not** declared.

Create an event action and subscription to declare a record: Walkthrough

Introduction

In this exercise, you are going to enable automatic declaration of a record object of the *employee record* class when a document is added as a new Employee document object to the RDOS1 object store.

Procedures

Procedure 1: Create properties to customize declaration

To automate record declaration, the following two properties are needed on the source RDOS:

- A property to specify the record class of the record that is going to be created
- A property to specify the folder location in the file plan where the record is going to be filed

1. Start FileNet Enterprise Manager Administration Tool.
   a. Click Start > Programs > IBM FileNet P8 Platform > FileNet Enterprise Manager Administration Tool.

      Tip: A shortcut to the tool in the Exercises folder is located on the Desktop of the student machine and another shortcut on the taskbar.

   b. Click Connect.
2. Create the property that is used to specify the record class.
   a. Select Object Stores > RDOS1 > Property Templates.
   b. Click Action > New Property Template.

c. Complete the wizard and use the following data to create a new property template:
   - Name: recordClassSymName
   - Type: String
   - All other fields: <Accept the default value.>

3. Create the property used to specify the file plan location for the record.
   a. Select RDOS1 > Property Templates.
   b. Click Action > New Property Template.
   c. Complete the wizard and use the following data to create a new property template:
      - Name: recordFileInFolder
      - Type: String
      - Maximum String Length: 256
        Tip: Click More on the Single or Multi-Value page in order to set the Maximum String Length field. Be sure to click OK.
      - All other items: <Accept the default value.>
4. Refresh the RDOS1 object store.

Procedure 2: Add the declare properties to a document class

After you create recordClassSymName and recordFileInFolder, you must add these properties to the document class on the source RDOS. These properties are going to be used by the event action and subscription that declare a record for each document of the subscribed document class.

1. In Enterprise Manager, select RDOS1 > Document Class > Employee.
2. Add the properties to the class.
   a. Right-click Employee and click Properties.
   b. On the Property Definitions tab, click Add/Remove.
   c. Move recordClassSymName and recordFileInFolder into the Selected column.
   d. Click OK.
3. In the Employee Class Properties window, configure the recordClassSymName property.
   a. On the Property Definitions tab, select recordClassSymName and click Edit.
   b. On the More tab, clear the Value Required and the Hidden check boxes if they are selected.
   c. Type `employeerecord` in the Default Value field.
   d. Click OK.
4. In the Employee Class Properties window, configure the recordFileInFolder property.
   a. On the Property Definitions tab, select recordFileInFolder and click Edit.

b. On the More tab, clear the Value Required and the Hidden check boxes if they are selected.

c. Type `/File Plan/Human Resources/Employee files/Employee file retention` in the Default Value field.

d. Click OK.

5. Apply the changes to the Employee document class and close its Properties window.
6. Refresh the RDOS1 object store.

Procedure 3: Import the declaration event action

You must run the import script from Enterprise Manager to create the declaration event action on the source RDOS. The import script adds the following files to the RDOS:

- RMAutoDeclare event action to the Events > Action folder
- RMAutoDeclare code module to the Root Folder > CodeModules folder
- RMAutoDeclare.properties configuration file to Root Folder > RM Samples folder

1. In Enterprise Manager, verify that the RDOS1 > Root Folder > CodeModules folder exists.

   If CodeModules does not exist, follow the instructions in the *FileNet P8 Platform Installation and Upgrade Guide* to create the CodeModules folder.

2. Import the RMAutoDeclareImport.xml file.

   a. Select RDOS1.

   b. Click Action > All Tasks > Import All.

   c. In the Import Manifest File field, browse and select the following file: C:\Documents and Settings\Administrator\Desktop\Infosphere enterprise records\IER install \Events\RMAutoDeclareImport.xml

   d. Click Open.

   e. In the External Content path field, browse and select the following folder: C:\Documents and Settings\Administrator\Desktop\Infosphere enterprise records\IER install\Events\lib

   f. Click OK.

   g. Click Import.

   h. Wait to see the Import Successful message and then click Exit.

   i. Click Exit in the RDOS1 Import Helper window.

3. Verify results.

   a. Expand RDOS1 > Root Folder > CodeModules and verify the RMAutoDeclare module exists.

b. Verify that RDOS1 > Root Folder > RM Samples folder exists and contains the RMAutoDeclare.properties file.

c. Verify that RDOS1 > Events > Event Action folder contains the RMAutoDeclare action.

Procedure 4: Edit the file for automatic record declaration

You must customize the RMAutoDeclare configuration file by adding declaration information.

1. Sign in to Workplace as Administrator.
2. Check out and edit the RMAutoDeclare.properties file.
   a. Browse to the RDOS1 > RM Samples folder.
   b. Check out and download the RMAutoDeclare.properties file to the Desktop of your student machine.
   c. Open the RMAutoDeclare.properties file on the Desktop in WordPad.
   d. Find each item listed in the following table, and change the existing value for the variable (to the right of the equals sign) with the value listed in the table.

Item	Value
rmevent.declare.RecordClassPropertySymname	recordClassSymName
rmevent.declare.RecordFiledInFolderPropertySymname	recordFileInFolder
rmevent.declare.FPOSObjectStoreName	FPOS1

   e. Delete the space after the first existing value when you replace it with recordClassSymName.
   f. Verify that the values are spelled correctly and that there are no extra spaces.
   g. Save your changes and close the file.
3. Check in RMAutoDeclare.properties file.
   a. In Workplace, right-click RMAutoDeclare.properties and click Check In.
   b. Check in the file as a major version.
   c. Do **not** declare the file as a record.
   d. Open RMAutoDeclare.properties from Workplace and verify that the file contains the changes you made.
   e. Sign out of Workplace.

Procedure 5: Create a record declaration subscription

You create a subscription that uses the declaration event action that you imported and modified in the previous procedure.

1. In Enterprise Manager, select RDOS1 > Document Class > Employee.
2. Click Action > Add Subscription.
3. Complete the wizard using the data in the following table to add a new subscription.

Wizard page	Prompt	Value
Name and Describe the Subscription	Name	DeclareEmployeeRecord
Specify the Type of Object	What type of object does the subscription act on	Applies to all instances of class Employee
Specify Triggers	Subscribed Events	Checkin Event
Specify the Event Action	Select an Event Action	RMAutoDeclare
Specify Additional Properties	State	Enabled Initial State: Selected Include Subclasses: Cleared Synchronous: Cleared

4. Verify results.
   a. Select RDOS1 > Events > Subscriptions.
   b. Verify that the DeclareEmployeeRecord subscription is listed in the right pane, that the Enabled value is True, and that the Synchronous value is False.
   c. Open the Properties window for this subscription and verify that RMAutoDeclare is selected in the Event Action field.
   d. Close the Properties window.
5. Refresh the RDOS1 object store.

Procedure 6: Test the automatic record declaration

You test the event subscription in Workplace to verify that the subscription works. First use the Administrator account and inspect the record.

1. Refresh the Content Engine cache for Workplace.
   a. Log in to the WebSphere administrative console.
   b. Click Applications and then click Enterprise Applications.
   c. Stop the Workplace application and then restart it.
   d. Log out of the WebSphere administrative console.

2. Add a new Employee document in Workplace.
   a. Sign in to Workplace as Administrator.
   b. Browse to RDOS1 > Human Resources > Employee files.
   c. Add a new document to the Employee files folder using the following information. Accept all other default values
      - Class: Employee
      - Document Title: 9999
      - For Family name, Given name, and Status, enter any values you choose.
      - Add as a major version.
      - Use any content of your choice. The content of the document is unimportant.
      - Do **not** click Declare as Record.
3. View the document information in the Browse page.
   a. Refresh the folder list and locate the new document with title 9999.
   b. Notice that the document has data in the Record Information column.

      Tip: If the Record Information column for document 9999 is blank, wait a few minutes and refresh the folder list again. This column remains blank if a record was not created.
   c. Under Record Information, notice the following items:
      - The GUID of the record that was created for the document
      - The object store and name of the record, which is the same as the Document Title
      - The GUID of the container where the record is filed is listed
4. View the document properties.
   a. Click the Get info icon for the document.
   b. Notice the class default value for the recordClassSymName and recordFileInFolder properties.
   c. Click Show System Properties.
   d. Notice the Record Information in the system properties list.
5. View the record properties.
   a. Click the Record Information icon (hand holding a sheet of paper) at the bottom of the system properties.
   b. View the record properties and notice that the value of Document Title is the same value that you specified for the document.
   c. Notice that the custom property values listed at the bottom for Family name, Given name, and Employee status are blank.

Information

The blank values for the custom record properties are expected because you have not created a subscription to synchronize the property values between the document class and the record class. This type of subscription requires custom coding of the event action handler, which is beyond the scope of this course.

d. Click the Get info icon beside Record Information at the bottom of system properties.

   The Record Information window opens.

e. Notice that the Records Manager Properties page includes editable value fields.

f. Notice that the Records Manager Properties page has an Actions list on the left that has different actions than those in the list for the document.

6. View the record security.

   a. Click the Security link for the Records Manager Properties page.

   b. Notice that only members of Records Manager groups can access the record. Administrator is a member of RMAdminG.

   c. Notice that the record inherits its security from the folder. This relationship is indicated by the folder with an up arrow beside it.

   d. Notice the security message: `Additional permissions due to markings are being applied. The above permissions may be overridden.`

   e. Exit the Record Information window.

7. View the document security.

   a. Click the Security link for the document.

   b. Notice that the document security is the same as the record security.

   c. Notice the security message: `The above permissions are being defined by a security proxy.`

   d. Exit the document Information page.

Procedure 7: Limit record declaration with a filter

You limit automatic record declaration to the first check-in (creation) of an Employee document by specifying a filter that allows record declaration only when the document version is 1.0 or 0.1. Otherwise, each time a new version (major or minor) of the document

is checked in, an additional record is declared. You add the filter to the event action subscription for record declaration.

1. Verify multiple declarations.
   a. Browse to RDOS1 > Human Resources > Employee files.
   b. Check out the 9999 document.
   c. Check in the 9999 document as a minor version, but do **not** click Declare as Record.
   d. Click the Get info icon for the checked in 9999 document and click Versions.
   e. Click the Get info icon for the minor version of the document.
   f. Click Show System Properties.
   g. Notice that the document version is identified as Version 1.1 and that associated record information is provided.
   h. Click Exit to close document Information page.
   i. Click Records Manager to open Enterprise Records.
   j. Browse to Human Resources > Employee files > Employee file retention.
   k. Notice that two records named 9999 are listed.
   l. Close Enterprise Records.
   m. Sign out of Workplace.
2. Add a filter expression to the record declaration subscription.
   a. In Enterprise Manager, select RDOS1 > Events > Subscriptions.
   b. Open the Properties window for the DeclareEmployeeRecord subscription.
   c. On the Configuration tab, type the following value in Filter Expression:

      ```
      MajorVersionNumber=0 AND MinorVersionNumber=1 OR MajorVersionNumber=1 AND MinorVersionNumber=0
      ```

   d. Click Apply.
   e. Close the Properties window.
   f. Refresh the RDOS1 object store.
   g. Close Enterprise Manager.
3. Verify the filter expression.
   a. Sign in to Workplace as Administrator.

b. Use the following information to add a new document to RDOS1 > Human Resources > Employee files:
   - Class: Employee
   - Document Title: 1111
   - For Family name, Given name, and Status, enter any values you choose.
   - Add as a major version.
   - Use any content of your choice. The content of the document is unimportant.
   - Do **not** click Declare as Record.

c. Verify that the Record Information column for document 1111 contains record data.

d. Check out document 1111.

e. Check in document 1111 as a minor version, but do **not** click Declare as Record.

f. Click the Get info icon for the 1111 document and click Versions.

g. Click the Get info icon for the minor version 1.1.

h. Click the Show System Properties link.

i. Click the Record Information icon.

j. Verify that there is no data in the Record Information area and that the message `Value Not Defined` is displayed.

k. Click Exit to close the Information page.

4. Sign out of Workplace.

Lesson 1.2. Declare records with workflow

Overview

Why is this lesson important?

The Human Resources department creates new policy documents that affect all employees. Management wants each new policy to be declared as a record. You must create a simple workflow to automatically declare a policy document as a record when the document is added to the object store.

Activities

- Create a workflow and workflow subscription to declare a record: Challenge, page 1-21
- Create a workflow and workflow subscription to declare a record: Walkthrough, page 1-23

Lesson dependencies

This lesson is dependent upon completion the previous lesson in this unit.

User accounts

Type	User ID	Password
Administrator	Administrator	filenet
IBM WebSphere administrative console	Administrator	filenet

Note

Passwords are always case-sensitive.

Create a workflow and workflow subscription to declare a record: Challenge

Challenge

Use the data in the following tables to complete this lesson.

- On the RDOS, create a Policy document class that is a subclass of Document. Create and assign to the Policy class two property templates: PolicyPurpose (String) and PolicyType (String).
- On the FPDOS, create a PolicyRecord record class that is a subclass of Electronic Record. Create and assign to the PolicyRecord class two property templates: PolicyPurpose (String) and PolicyType (String).
- Create a workflow definition that uses a Policy document as the initiating attachment and includes a declare step. The Document Title, PolicyPurpose, and PolicyType properties must be synchronized with the record object properties.
- Create a workflow subscription on the Policy document class that launches the workflow you created.

Data

Use this data when you create workflow data fields.

Data field name	Type	Expression
RecordClass	String	“PolicyRecord”
RecordID	String	“”
PropertyNames	String	{“”}
PropertyValues	String[]	{“”}
wfl_PolicyPurpose	String	“”
wfl_PolicyType	String	“”

Use this data when you create the workflow.

Attachment Name	Value	Description
DocToDeclare	<leave blank>	Document that will be declared
RMContainer	<leave blank>	Folder or category in the file plan where the record will be declared

Use this data when you create the declaration parameters on the component step.

Operation parameters	Expression
Folder	RMContainer
Document	DocToDeclare
RMType	RecordClass
DocumentID	RecordID

Configure the RMContainer using the following value, which defines where to file the record object.

Item	Value
RMContainer	FPOS1 > Records Management > File Plan > Human Resources > Current policies > Policy retention

Use these settings to map the document properties to workflow fields.

Name	Expression
PropertyNames	{“DocumentTitle”, “PolicyPurpose”, “PolicyType”}
PropertyValues	{DocTitle, wfl_PolicyPurpose, wfl_PolicyType}

Verification

- Add a Policy document to RDOS1 > Human Resources > Policies folder. If this folder does not exist, create it.
- After the workflow executes, ensure that the document was declared as a record to FPOS1 > Records Management > File Plan > Human Resources > Current policies> Policy retention and that the Document Title, PolicyPurpose, and PolicyType property values from the document are correctly mapped to the record object.

Create a workflow and workflow subscription to declare a record: Walkthrough

Introduction

In this exercise, you create two versions of a simple workflow that declares a record when a Policy document is added to the object store. In the first version of the workflow, you add an Approve step before the Declare step to allow for user approval of the document before the record is declared. In the second version of the workflow, you remove the Approve step so that the workflow automatically declares the record with no user interaction. You create a workflow subscription that launches the workflow when a new Policy document is created.

Procedures

Procedure 1: Create a Policy document class on the RDOS

You create a Policy document class. Only documents of this class are going to be configured to launch the workflow that declares a record.

1. Start the FileNet Enterprise Manager Administration Tool.
2. Create two new property templates on RDOS.
   a. Select RDOS1 > Property Templates.
   b. Click Action > New Property Template.

c. Complete the wizard and use the following information.

Field	Value
Name and Symbolic Name	PolicyPurpose
Data Type	String
Single or Multi Value	Single
All other fields	<Accept default values.>

d. Click Action > New Property Template.

e. Complete the wizard and use the following information.

Field	Value
Name and Symbolic Name	PolicyType
Data Type	String
Single or Multi Value	Single
All other fields	<Accept default values.>

3. Create a new document class and assign the new property templates.

a. Select RDOS1 > Document Class.

b. Click Action > New Class.

c. Complete the wizard and use the following information.

Field	Value
Name and Symbolic Name	Policy
Selected Properties	PolicyPurpose PolicyType
All other fields	<Accept default values.>

Procedure 2: Create a PolicyRecord class on the FPOS

You create a PolicyRecord class that is a subclass of Electronic Record on the FPOS. The workflow that you build in a later procedure is used to declare new Policy documents as records of the type PolicyRecord class.

1. Create two new property templates on the FPOS.

a. Select FPOS1 > Property Templates.

b. Click Action > New Property Template.

c. Complete the wizard and use the following information.

Field	Value
Name and Symbolic Name	PolicyPurpose
Data Type	String
Single or Multi Value	Single
All other fields	<Accept default values.>

d. Click Action > New Property Template.

e. Complete the wizard and use the following information.

Field	Value
Name and Symbolic Name	PolicyType
Data Type	String
Single or Multi Value	Single
All other fields	<Accept default values.>

2. Create a new record class and assign the new property templates.
   a. Select FPOS1 > Document Class > Record > Electronic Record.
   b. Click Action > New Class.
   c. Complete the wizard and use the following information.

Field	Value
Name and Symbolic Name	PolicyRecord
Selected Properties	PolicyPurpose PolicyType
All other fields	<Accept default values.>

   d. Close Enterprise Manager.
3. Refresh the Content Engine cache for Workplace.
   a. Log in to the WebSphere administrative console.
   b. Click Applications and then click Enterprise Applications.
   c. Stop the Workplace application and then restart it.
   d. Log out of the WebSphere administrative console.
4. Create a folder for workflows and documents for testing.
   a. Sign in to Workplace as Administrator.

b. Add a new folder to RDOS1 object store named `Workflows`.

c. Use the following information to add a new Policy document to the RDOS1 > Human Resources > Policies folder.

- Document Class: `Policy`
- Document Title: `Policy 1`
- PolicyPurpose: `Travel`
- PolicyType: `T401`
- Add as a major version.
- Use any content of your choice. The content of the document is unimportant.
- Do **not** click Declare as Record.

d. Sign out of Workplace.

Procedure 3: Verify that workflow services are started

Process Service, the component managers, and components must be running before you can use workflow services. This procedure is a standard FileNet P8 Administration procedure, so you are expected to be familiar with it.

1. Check status of Process Engine and Component Manager.
   a. Click Start > Programs > IBM FileNet P8 Platform > Process Task Manager.
   b. Verify that hqdemo1 Process Engine Server is running. If it is not running, start it.
   c. Verify that the PEConnection.ALL component manager and all its components are running. If they are not running, start component manager and components.
2. Close Process Task Manager.

Procedure 4: Explore RM_Operations and add parameter descriptions

Records Manager provides a set of operations used in workflows. These operations are performed by component steps, which use the RM_Operations component queue. You inspect the RM_Operations component queue and determine the parameters that are used for record declaration. You add parameter descriptions to the declareRecord operation in order to learn the use for each parameter.

1. Sign in to Workplace as Administrator.
2. Start the Process Configuration Console from the Admin page.
3. Select PEConnection[1] and click Action > Connect.
4. View RM_Operations queue properties and add descriptions.
   a. Expand the Component Queue node.
   b. Right-click RM_Operations and click Properties.
   c. Select the Operations tab.
   d. Select the declareRecord operation to view the parameters.

e. For each parameter listed in the following table, type its description in the Description field.

Tip: Press Enter after typing each description to ensure that the entry is accepted.

Name	Type	Description
Folder	Attachment	Container where the record is to be filed
Document	Attachment	Document to be declared as a record
RMType	String	Symbolic name for record class to be used for declaration
PropertyNames	String[]	Array of property names to be set for the record
Property Values	String[]	Matching array of property values
DocumentID	String	ID of record that is declared

f. Click OK.

g. Right-click PEConnection[1] node and click Commit Changes.

h. Click Continue.

i. Click Close.

5. Click File > Exit and close the Process Configuration Console window.

Procedure 5: Create a workflow definition to approve and declare records

1. Start the Process Designer from the Author > Advanced Tools page.
2. Define workflow properties.
   a. Click Action > Workflow Properties to open the Workflow Properties window.
   b. On the General tab, type the following property values:
      - Workflow Name: `Simple Record Declaration`
      - Subject: `Policy Declaration`
   c. Select the Data Fields tab.

d. Add new data fields using the following information. Accept default values for all field not listed.

Tip: Press Enter after typing the last data field to ensure that the entry is accepted.

Name	Type	Expression
RecordClass	String	“PolicyRecord”
RecordID	String	“”
DocTitle	String	“”
PropertyNames	String[]	{“”}
PropertyValues	String[]	{“”}
wfl_PolicyPurpose	String	“”
wfl_PolicyType	String	“”

e. Click the Attachments tab.

f. Add two new attachments using the following information. Accept default values for all fields not listed.

Tip: Press Enter after typing the last field to ensure that the entry is accepted.

Name	Value	Description
DocToDeclare	<Leave blank.>	Document to be declared
RMContainer	<Leave blank.>	Folder or category in the file plan where the record is to be declared

g. Select the DocToDeclare field and click the Initiating Attachment icon (the triangle icon) in the Attachments toolbar.

h. Verify that the Initiating Attachment symbol is displayed to the left of DocToDeclare.

i. Double-click the Value column of the RMContainer field.

j. In the *Browse for item* window, select the following location: FPOS1 > Records Management > File Plan > Human Resources > Current policies > Policy retention.

k. Click Close to close the Workflow Properties window.

3. Save your work.

a. Click File > Save As.

b. Save the file in My Documents using the default file name.

Tip: It is a good practice to periodically save your workflow definition file as you work on it.

4. Configure the Launch step.

a. Select LaunchStep on the Workflow main map.

b. In the properties pane, select the Parameters tab.

c. Under Selected Parameters, select DocToDeclare.

d. Under Access Rights, verify that Read/Write is displayed. If it is not, select Read/Write in the Access Rights field.

e. On the Parameters tab, move the following parameters to the list of Selected Parameters.

- DocTitle
- RMContainer
- wfl_PolicyPurpose
- wfl_PolicyType

f. Verify that all parameters have Read/Write access.

g. Select the Assignments tab.

h. Use the following information to add two field assignments.

Tip: Type these expressions **exactly** as they are listed in the table. Notice that the PropertyValues do not have quotation marks.

Name	Expression
PropertyNames	{“DocumentTitle”,“PolicyPurpose”,“PolicyType”}
PropertyValues	{DocTitle,wfl_PolicyPurpose,wfl_PolicyType}

5. Add an Activity step.

a. Drag an Activity step from the BPM Palette to the right of the LaunchStep.

b. In the Name field, type the following value: Approve

c. In the Properties pane General tab, click the Modify (pencil) icon in the Participants area.

d. Search for and select the Administrator user and move the user to the Selected Participants list.

e. Click OK to close the Participant Selection window.

f. On the Parameters tab, move the following parameters to the list of Selected Parameters.

- DocTitle
- DocToDeclare
- RMContainer
- wfl_PolicyPurpose
- wfl_PolicyType

g. Verify that all parameters have Read/Write access.

h. On the Routing tab, add the following Responses:

- `Approve for Declaration`
- `Reject`

Tip: Add the response by clicking in the Name field and typing in the Response name. Press Enter after typing each response to ensure that the entry is accepted.

i. On the map, draw a route from LaunchStep to the Approve step.

6. Add a Component step.

a. Drag a Component step from the BPM Palette and place it to the right of the Approve step.

b. In the Name field, type the following value: `Declare`

c. In the Properties pane, click Add (the icon that resembles a sheet of paper) next to Operations on the General tab.

d. In the Component field, select RM_Operations.

e. Select the declareRecord operation and click OK.

f. For each Operation Parameter, click the field in the Expression column and select the expression listed in the following table.

Tip: The PropertyNames and PropertyValues fields are automatically populated. If you do not see values in these fields, make sure that you have defined the data fields in step 2d.

Operation Parameters	**Expression**
Folder	RMContainer
Document	DocToDeclare
RMType	RecordClass
DocumentId	RecordID

g. Draw a route from the Approve step to the Declare step.

h. In the route properties, select Condition under Conditional Routing.

i. On the Response tab, select the following values:

- Condition: ALL
- Response: Approve for Declaration
- Operator: <Inactive>
- Value: <Leave blank.>

j. Click Insert.

k. Click File > Save to save your work.

Procedure 6: Validate the workflow

1. Click File > Validate Workflow Collection.
2. If a message is displayed that says validation was successful, click Close. Otherwise, use the Validation Results window to investigate and correct errors and warnings that are displayed before you proceed.
3. Verify that your workflow map looks similar to the following diagram.

Procedure 7: Launch and process the workflow

You launch the workflow and test the approval and record declaration steps. You verify that that the workflow synchronized the Document Title property of the initiating document with the record object property.

1. Launch the workflow and complete the add document wizard.
   a. Click File > Launch Main Workflow.
   b. In the wizard, browse to RDOS1 > Workflows.
   c. Type `Simple Record Declaration` for the Document Title.
   d. Click Finish.
2. Complete the Launch step.
   a. Type the following values in the fields:
      - Subject: `First Workflow Test`
      - DocTitle field: `Policy 1`
      - wfl_PolicyPurpose: `Travel`
      - wfl_PolicyType: `T401`
   b. To add a DocToDeclare value, click the icon to the left of the DocToDeclare and click Assign.
   c. Browse to locate RDOS1 > Human Resources > Policies > Policy 1.
   d. Click Select Current Version for Policy 1.
   e. Click Launch.
   f. In Process Designer, click File > FileNet > FileNet Cancel Checkout.
   g. Close Process Designer.
3. Process the Approve step.
   a. Open the First Workflow Test item found in Tasks > My Inbox.
   b. Verify that DocToDeclare is assigned with Policy 1.

c. Verify that the RMContainer is assigned with Policy retention.

d. Select the Approve for Declaration response.

e. Click Complete.

4. Verify the record declaration.

a. Click Records Manager to open Enterprise Records.

b. Find the new record in File Plan > Human Resources > Current policies > Policy retention.

c. Click the Get info icon for the Policy 1 record.

d. Verify that the value of Document Title is `Policy 1`, PolicyPurpose is `Travel`, and PolicyType is `T401`.

e. Click Exit to close the Record Information window.

f. Sign out from Enterprise Records and close the window.

Procedure 8: Modify the workflow to remove the Approve step

You remove the Approve step from your workflow definition so that the record is declared automatically without any user intervention required.

1. Return to the Workplace window.
2. In Process Designer, check out the workflow definition.

a. Start the Process Designer from the Author > Advanced Tools page.

b. Click File > FileNet Open/Checkout.

c. Browse to locate and open the following file: RDOS1 > Workflows > Simple Record Declaration.

3. Remove the Approve step.

a. On the workflow map, right-click Approve and click Delete.

b. Draw a route from LaunchStep to Declare.

c. Click File > Validate Workflow Collection and correct any validation errors before proceeding.

4. Transfer the workflow definition.

a. Click File > Transfer Workflow Collection.

b. In the wizard, click Next to use the current document title.

c. Click Finish and click Close.

d. Click File > Exit.

e. When you are prompted, select Cancel the Checkout and click OK.

f. Click No.

g. Close the Process Designer application window.

Procedure 9: Add a workflow subscription

You create a workflow subscription to launch the workflow and map the properties of the originating document to workflow fields. The fields populate the properties of the record object when the workflow launches. All these actions happen automatically when a new Policy document is added to the system.

1. Ensure that Simple Record Declaration is checked in.
   a. Browse to RDOS1 > Workflows.
   b. Verify that the workflow definition, Simple Record Declaration, is not checked out.
2. Add a workflow subscription on the Policy class.
   a. Click Author > Advanced Tools > Add Workflow Subscription.

      Tip: You must be signed in as an Administrator.

   b. Use the information in the following table to complete the wizard steps. Accept default values for any fields not provided in the table.

      Tip: On the Set Property Map step, select the data field and the property name, and then click the plus (+) button to add the property mapping to the property map field.

Step	Property	Value
Select Target	Target Class	RDOS1 > Document > Policy
Select Workflow	Workflow	RDOS1 > Workflows > Simple Record Declaration > Select from Versions > [Select latest version.]
Set Properties	Name	Declare Policy
	Description	Launch Simple Record Declaration on Policy creation.
	Subscribed Events	Creation Event
Set Property Map	Data Field Name = Property Name	DocTitle = Document Title wfl_PolicyPurpose = PolicyPurpose wfl_PolicyType = PolicyType

Procedure 10:Test the workflow subscription

You add a new Policy document to the RDOS1 object store to test the workflow subscription. The subscription launches the workflow and maps the Document Title to the

DocTitle field. The workflow declares the record and synchronizes the Document Title of the initiating document with the record object property.

1. Add a new Policy document.
   a. Use the following information to add a new Policy document to the RDOS1 > Human Resources > Policies folder.
      - Document Class: `Policy`
      - DocTitle field: `Policy 2`
      - PolicyPurpose: `Holiday`
      - PolicyType: `H415`
      - Add as a major version.
      - Use any content of your choice. The content of the document is unimportant.
      - Do **not** declare the document as a record.
   b. Verify that the Policy 2 document is listed in the Policies folder.
2. Verify that the record was created with correct Document Title.
   a. Click Records Manager to open Enterprise Records.
   b. Find the new record in File Plan > Human Resources > Current policies > Policy retention.
   c. Click the Get info icon for the Policy 2 record.
   d. Verify that the value of Document title is `Policy 2`, PolicyPurpose is `Holiday`, and PolicyType is `H415`.
   e. Click Exit to close the Record Information window.
   f. Sign out from Enterprise Records and close the window.
3. Sign out of Workplace.