

Lesson: Getting started with IBM FileNet Process Designer

Overview

Why is this lesson important to you?

You are implementing an IBM FileNet BPM solution. You must understand how to use the process design tool, IBM FileNet Process Designer, in order to create a new workflow definition, add steps and routes to a workflow map, and save a workflow definition file.

Activities

- Create and save a new workflow definition: Challenge
- Create and save a new workflow definition: Walkthrough

Requirements

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

Virtual student system

Connect to your student system to complete these lab activities. See the Readme First file on the Materials tab if you need instructions to connect to the student system.

System startup and system check

IBM FileNet P8 software services on your student system must be started. Do the procedures in *Appendix A: System startup and system check* before proceeding with the lessons in this unit.

- Perform a system check whenever you start up an IBM FileNet P8 system or start working on a system that is in an unknown state. These activities assume that you have performed a system check when you begin an activity session.

User accounts

Type	User ID	Password
FileNet Workplace XT	filenetadmin	IBMFileNetP8

Create and save a new workflow definition: Challenge

Challenge

Start Process Designer and create a new workflow definition. Add two Activity steps and draw routes to create a linear process. Name the first Activity step Verify Information. Name the next Activity step Process Loan. Save the workflow definition to the local file system and to the object store. Use the data in the table to complete this activity.



Hint

For help with the Process Designer user interface, see the following IBM FileNet P8 help topics for Process Designer: “Start a new workflow definition,” “Add a step,” “Create a route between steps,” and “Save a workflow definition in Design mode.”

Data

Document item	Value
Local file path	C:\Labs\F145\Introduction
File name on local file system	Loan_Workflow.pep
Object Store	LoanProcess
Folder location for the document in the object store	LoanProcess > Workflows
Document title in the object store	Loan Processing - Introduction
Security	Use default security.

Verification

Your workflow map must include a launch step and two Activity steps. Your workflow map must look similar to the following diagram.



Create and save a new workflow definition: Walkthrough

Introduction

This exercise gives you basic familiarity with the Process Designer application and teaches you how to create and save a new workflow definition file.

In this exercise, you are going to define a simple workflow that is used for processing a customer's loan application. You are going to build upon this simple loan process in subsequent units in this course. This process is described in more detail in a later lesson in this unit.

Procedure 1: Open Process Designer in Design mode

1. On your student Windows XP system, log in to FileNet Workplace XT using the filenetadmin account listed in the "Lesson Overview" section.
2. In Workplace XT, click Tools > Advanced Tools > Process Designer.
3. Verify that the following text is displayed in the Process Designer main toolbar:

Mode: Design



Information

Process Designer opens in Design mode by default because you signed in using an administrative account that is a member of the PWDesigner access role.

Procedure 2: Create a new workflow definition



Information

Process Designer works on one workflow definition at a time. If you have an existing workflow definition open, the File > New command prompts you to save changes, closes the file, and creates a new, empty workflow definition file.

If you have just opened Process Designer, it is not necessary to use the New command. A new, empty workflow definition file is already created for you. The workflow map includes a LaunchStep and is ready for you to add steps and routes.

1. Add two Activity steps to a workflow map.
 - a. Drag an Activity step (blue circle icon) from the docked step palette in the toolbar to the workflow map and place it to the right of LaunchStep.



Hint

When working with steps, you can leave the step palette docked in the Steps toolbar or choose steps from a floating step palette. To open a floating step palette window, click the right arrow icon in the Steps area to open the Palette menu and then click Open Palette Window.

- b. In the Activity tab, replace the default name in the Step Name field with the value *Verify Information*.
 - c. Drag another Activity step from the step palette and place it to the right of *Verify Information*.
 - d. In the Activity tab, replace the default name in the Step Name field with the value *Process Loan*.
2. Draw routes between steps.
- a. Position the cursor over the right edge of *LaunchStep* until the route symbol appears. Draw a route from *LaunchStep* to *Verify Information*.
 - b. Position the cursor over the right edge of *Verify Information* until the route symbol appears. Draw a route from *Verify Information* to *Process Loan*.
 - c. Verify that your workflow map looks similar to the following diagram. This diagram contains a *LaunchStep* and two Activity steps.



Procedure 3: Save a workflow definition to a local file

1. On the menu bar, click File > Save As.
2. Save the file in [C:\Labs\F145\Introduction](#) folder as *Loan_Workflow.pep*.
3. Notice that the new file name is displayed in the status bar.

Procedure 4: Save a workflow definition to an object store

1. On the menu bar, click File > FileNet > FileNet Add New.
2. Complete the “Save the workflow definition to an object store” wizard.
 - a. Click Browse to select the object store and folder as follows: *LoanProcess > Workflows*.
 - b. Click Select.

dc. Click Next.

d. Type `Loan Processing Workflow - Introduction` in the Document Title field.

e. Click Finish.

Procedure 5: Close Process Designer

1. On the menu bar, click File > Close.
2. Select the “Cancel the checkout?” option and click OK.
3. Click File > Exit and then close the Process Designer applet window.



Important

If you use File > Exit to close Process Designer, you are always prompted to save any unsaved changes before the application closes.

If you click the Close button [X] in the upper right corner of the window, Process Designer closes immediately and you lose any unsaved changes.

4. Verify properties of the workflow definition file in the object store.
 - a. In Workplace XT, browse to the `LoanProcess > Workflows` folder.
 - b. Locate the `Loan Processing Workflow - Introduction` document and notice the icon associated with the document.
 - c. Select the document and click the Properties icon.
 - d. Click System properties.
 - e. Verify that the file MIME Type is `application/x-filenet-workflowdefinition`.
This file type is associated with a single process workflow definition in the Content Engine.
 - f. Click OK to close the document properties view.
5. Log out of Workplace XT and close the browser.
6. Verify the workflow definition local file.
 - a. Open Windows Explorer.
 - b. Locate the file C:\Labs\F145\Introduction\Loan_Workflow.pep.
 - c. Use WordPad to open the `Loan_Workflow.pep` file.
 - d. Browse through the file and notice the XML format.
 - e. Close WordPad without making changes to the file.