Lesson: Workflow properties and security

Overview

Why is this lesson important to you?

You are designing an IBM FileNet BPM solution. You must set the global properties for your workflow definition and control access to the workflow data structures. You must test the workflow to verify the changes.

Activities

- Control access to workflow data and configure global settings: Challenge
- Control access to workflow data and configure global settings: Walkthrough

Lesson dependency

You must have successfully completed the previous lesson activities. This lesson requires specific region data structures to already be configured.

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
FileNet Workplace XT (member of Loan Processors group)	peter	IBMFileNetP8
FileNet Workplace XT (member of Loan Underwriters group)	uma	IBMFileNetP8

Note

Passwords are always case-sensitive. User names are not case-senitive. Many user names use only lowercase letters on the student system.

Control access to workflow data and configure global settings: Challenge

Challenge

Use Process Designer Configuration view to verify work queue and roster security properties for the loan region data structures. In the loan workflow definition file, assign the Roster, Event Log, and Email Notification workflow properties. Assign the F_Subject system field after completion of the LaunchStep. Set workflow participant privileges for the Process Loan and Complete Loan steps. Test the workflow and verify that the region and workflow changes were successful. Use the data in the table to complete this exercise.

Data

Item	Value
Local file path	C:\Labs\F145\Infrastructure
Isolated region	LoanCP[3]
LoanProcessor work queue properties	Security: Loan Processors [QP]
LoanUnderwriter work queue properties	Security: Loan Underwriters [QP]
LoanRoster roster properties	Security: • Loan Processors [QC] • Loan Underwriters [QC]
Starting workflow definition file [Use this file if you successfully completed all exercises in Unit 1 Introduction to Process Designer.]	Object store > LoanProcess > Workflow > Loan Processing Workflow - Introduction
Starting workflow definition file [Use this file if you did **not** successfully complete all exercises in Unit 1 Introduction to Process Designer.]	C:\Labs\F145\Solutions\Loan Processing Workflow - Introduction unit solution.pep
Workflow Properties	• Roster: `LoanRoster` • Event Log: `LoanLog` • Enable Email Notification: Selected
LaunchStep property Assignment After Completion	`F_Subject = F_Subject + customer_name`

Item	Value
Process Loan step participant privileges	• Reassign: Cleared • View Status: Cleared • View History: Cleared
Complete Loan step properties	Instructions: `Review information and complete loan processing.` Activity Type: LoanUnderwriter work queue Parameters: • customer_name [Read] • loan_amount [Read] • loan_date [Read] Participant privileges: • Reassign: Selected • View Status: Selected • View History: Selected
User accounts for workflow testing	• User ID: peter (peter is a member of Loan Processors group) • User ID: uma (uma is a member of Loan Underwriters group)

Verification

- You must launch and process the workflow through to completion.
- During workflow processing, you must be able to perform a roster search in Process Administrator and locate the workflow in the LoanRoster with the subject Loan Processing appended with the customer name.
- The user ID peter must be able to view and process work in the LoanProcessor queue. Peter must not be able to view workflow

history and comments.

- The user ID uma must be able to complete the Complete Loan step and view workflow history and comments from previous steps in the workflow.
- After workflow completion, you must be able to view workflow history for the workflow in the LoanLog event log.

Control access to workflow data and configure global settings: Walkthrough

Introduction

This exercise gives you familiarity with global settings that affect the behavior of a workflow and apply to all steps. You get practice in setting workflow properties in Process Designer. You verify queue and roster properties in Process Designer Configuration view.

Procedure 1: Verify queue and roster security

1. On your student Windows XP system, log in to Workplace XT using the filenetadmin user
account listed in the "Lesson Overview" section.

2. Open Process Designer Configuration view.

   a. In Workplace XT, click Tools > Advanced Tools > Process Designer.

   b. In the Process Designer menu, click View > Configuration.

   c. Expand the LoanCP[3] hierarchy to expose all region objects.

3. Verify LoanProcessor work queue security.

   a. In the Work Queues folder, right-click LoanProcessor and click Properties.

   b. Select the Security tab.

   c. Verify that the Loan Processors group has both Query and Process access rights.

      Notice that the Loan Underwriters group does not have access rights.

   d. Click Cancel to close the LoanProcessor Queue Properties window.

4. Verify LoanUnderwriter work queue security.

   a. In the Work Queue folder, right-click LoanUnderwriter and click Properties.

   b. Select the Security tab.

   c. Verify that the Loan Underwriters group has both Query and Process access rights.

      Notice that the Loan Processors group does not have access rights.

   d. Click Cancel to close the LoanUnderwriter Queue Properties window.

5. Verify LoanRoster security.

   a. In the Rosters folder, right-click LoanRoster and click Properties.

   b. Select the Security tab.

   c. Verify that the Loan Processors and Loan Underwriters groups have Query and Create access rights.

   d. Click Cancel to close the LoanRoster Roster Properties window.

Procedure 2: Set workflow properties

1. Open the loan processing workflow definition file.

   a. On the Process Designer main toolbar, click File > FileNet > FileNet Open/Checkout.

   b. Browse to locate and select the following file:

   LoanProcess > Workflows > Loan Processing Workflow - Introduction

   c. Select **"Open As Copy"** and click Open.

Important

You built this workflow definition file and saved it to the object store in the previous unit. If you did **not** successfully complete all exercises in the previous unit, then instead you must open the following starting file located on the student system local disk:

C:\Labs\F145\Solutions\Introduction\Loan Processing Workflow - Introduction unit solution.pep

The remaining exercises in this unit depend upon having a working copy of the starting workflow definition.

   d. Explore the workflow definition to refresh your memory of the process flow, steps, and step properties.

2. Assign the roster and event log.

   a. In Workflow Properties, click Advanced.

   b. Assign Advanced properties using the following information.

   - Roster: `LoanRoster`
   - Event Log: `LoanLog`
   - Enable Email Notification: Selected

Procedure 3: Use a system field and set step properties

1. Assign the F_Subject field after the LaunchStep.

   a. Select the LaunchStep.

   b. In the LaunchStep Properties pane, click Assignments.

   c. Under the After Completion Field Assignments, click in the Name field and type the following: `F_Subject`

   Notice that the F_Subject field does not appear in the Name list because it is a system field. You must type `F_Subject` in the Name field.

   d. In the Expression field, type the following: `F_Subject + customer_name`

Information

You can specify a value that the system assigns to a data field or attachment after processing of the launch step completes. This assignment occurs before processing of the next step begins. You learn more about assignments in another lesson.

2. Assign step properties for the Complete Loan step.

   You allow participants to view workflow history and comments at the Complete Loan step.

   a. Select the Complete Loan step.

   b. In the General tab of the Complete Loan Properties pane, assign the following step properties.

      - Work Queue: `LoanUnderwriter`
      - Instructions in Step Processor: `Review information and complete loan processing.`

   c. In the Participant Privileges area, set the check box options as follows:

      - Reassign: Selected
      - View Status: Selected
      - View History: Selected

   d. Select the Parameters tab.

   e. Use the right arrow to move the customer_name, loan_amount, and loan_document parameters from the Available Parameters list to the Selected Parameters list.

   f. Assign Access Rights to each Selected Parameter as shown in the table.

Selected Parameters	Access Rights
customer_name	Read
loan_amount	Read
loan_document	Read

3. Prohibit participants from viewing workflow history and comments at the Process Loan step.

   a. Select the Process Loan step.

   b. Select the General tab.

   c. In the Participant Privileges area, set the check box options as follows:

      - Reassign: Cleared
      - View Status: Cleared
      - View History: Cleared

4. Validate the workflow and correct any validation errors.

Procedure 4: Launch and test the workflow

1. Transfer and launch the workflow and correct workflow name problem.
   a. Click File > Launch Main Workflow.
   b. In the Check workflow name window, verify that "Use this workflow name" is selected and click OK.
   c. Complete the "Save the workflow definition to an object store" wizard using the following information.
      - Object store: `LoanProcess > Workflows`
      - Document Title: `Loan Processing Workflow – Infrastructure`
      - Security: <Accept default values.>
   d. Read the error message in the Transfer Workflow window and click Close.

      You received a transfer error because you changed the roster and event log settings for a previously transferred workflow. To correct this error, you must change the workflow name and transfer again.
   e. Click File > Launch Main Workflow.
   f. In the Check workflow name window, select the "Use another workflow name" option.
   g. Type the following new workflow name: `Loan Processing – Infrastructure`
   h. Click OK.
   i. In the Checkin Workflow Definition wizard, click Finish to checkin the file and save your changes.

      The system has updated the workflow definition with the new workflow name "Loan Processing - Infrastructure," which you typed in the "Check workflow name" window. The workflow subject remains as previously specified.
2. Complete the Launch Step processor.
   a. In the Launch Step window, type the following values in the fields:
      - customer_name: `John Jones`
      - loan_amount: `5000.`
   b. Click Launch.
3. Verify that the workflow is using LoanRoster and the workflow subject assignment.
   a. In Process Designer, select Tools > Process Administrator.
   b. Construct and execute a search of LoanRoster by using the data in the following table.

Search criteria	Value
Look for	Work Items
In	Workflow Roster
Select one	LoanRoster
Search mode	Edit (all fields)

c. Verify that your work item appears in the results pane and is in the Inbox(0) queue assigned to olivia.

Tip: See the Queue and F_BoundUser field values.

d. Verify that F_Subject was correctly set after the LaunchStep.

Notice that if you correctly completed Procedure 3, the F_Subject field includes the customer name, John Jones, which you assigned in the LaunchStep.

4. Complete the Verify Information step and add comments.

a. In the results pane, select the row containing the work item in the Inbox assigned to olivia.

b. Click Open Step Processor on the results pane toolbar.

c. In the Verify Information step processor window, type a value of your choice in the interest_rate field.

d. Type text comments of your choice in the Comments field.

e. Click Complete.

f. Close Process Administrator.

5. Exit Process Designer and log out of Workplace XT.

a. Switch to the Process Designer window.

b. Click File > Exit to close Process Designer.

c. In the message box, select “Cancel the checkout” and click OK.

d. Close the applet window.

e. Log out the filenetadmin user from Workplace XT.

6. Verify security for LoanProcessor queue and process the Process Loan step.

a. Log in to Workplace XT using the user account peter listed in the "Lesson Overview" section.

Peter is a member of the Loan Processors group.

b. Click Tasks > Public Inboxes.

c. Verify that the only public inboxes listed are LoanCustomer and LoanProcessor.

d. Click LoanProcessor.

e. In the LoanProcessor public inbox, click the Loan Processing task name to open the Process Loan task.

f. Verify that all data fields are read-only.

g. Verify that no links are displayed for Reassign, Track Status, and History.

In Procedure 3, you cleared the check boxes for all participant privileges of the Process Loan step.

h. Type text comments of your choice in the Comments field.

i. Click Complete.

j. Log out the user peter from Workplace XT.

7. Verify security for LoanUnderwriter queue and process the Complete Loan step.

a. Log in to Workplace XT using the user account uma listed in the "Lesson Overview" section.

Uma is a member of the Loan Underwriters group.

b. Click Tasks > Public Inboxes.

c. Verify that the only public inboxes listed are LoanCustomer and LoanUnderwriter.

d. Click LoanUnderwriter.

e. In the LoanUnderwriter public inbox, click the Loan Processing task name to open the Complete Loan task.

f. Click History to display the workflow history including comments.

g. Verify that the comments you typed in the Verify Information and the Process Loan steps are displayed.

h. Click Task to return to the task view.

i. Type text comments of your choice in the Comments field.

j. Click Complete.

k. Log out the user uma from Workplace XT.

8. Verify that the workflow is using the correct event log.

a. Log in to Workplace XT using the user account filenetadmin listed in the "Lesson Overview" section.

b. Click Tools > Administration > Process Administrator.

dc. Construct and execute a filtered search of the LoanLog event log by using the data in the following table.

Search criteria	Value
Look for	Events
In	Event Log
Select one	LoanLog
Search mode	Not applicable
Criteria	`F_Subject like '%John Jones'`

d. Verify that events for your workflow are included in the results pane.

e. Verify that, for some events, the F_Comment field contains the comments that you typed.

f. Close Process Administrator.

g. Log out of Workplace XT and close the browser.