Lesson: Using basic workflow elements in Design mode

Overview

Why is this lesson important to you?

You are implementing an IBM FileNet BPM solution. You must understand how to use Process Designer in Design mode in order to define required basic workflow elements and validate, transfer, and launch a workflow definition.

Activities

- Use Design mode to add workflow and step properties and to validate and launch a workflow: Challenge
- Use Design mode to add workflow and step properties and to validate and launch a workflow: Walkthrough

Lesson dependency

You must have successfully completed the previous lesson activities.

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.

Lesson dependency

You must have successfully completed the previous lesson activities.

User accounts

Type	User ID	Password
FileNet Workplace XT	filenetadmin	IBMFileNetP8
FileNet Workplace XT	olivia	IBMFileNetP8

Note

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

Use Design mode to add workflow and step properties and to validate and launch a workflow: Challenge

Challenge

Open the workflow definition that you previously saved to the object store. Add data fields and step properties to the workflow as described in the Data table. Save the workflow definition. Validate, transfer, and launch the workflow using Process Designer. Complete processing of the workflow.

Hint

For help with this exercise, see the following IBM FileNet P8 Information Center topics for Process Designer: “Specify step properties” and “Validate, transfer, and launch a workflow definition or workflow collection.”

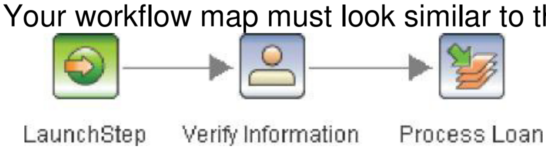
Data

Item	Value
Folder location for the document in the object store	LoanProcess > Workflows
Document title in the object store	Loan Processing Workflow - Introduction
Workflow name	Loan Processing
Workflow subject	Loan Processing
Data fields	• customer_name, String • interest_rate, Float
LaunchStep properties	Instructions in Step Processor: `Enter your loan information and click Launch when you are done.` Parameters: • customer_name [Read/Write] • loan_amount [Read/Write] • loan_date [Read/Write]

Item	Value
Verify Information step properties	Instructions in Step Processor: `Verify the customer information and fill in the current interest rate and loan date. Click Complete when you are done.` Activity Type: Participants • olivia Parameters: • customer_na [Read] • interest_rate • loan_amount • loan_date [Read/Write]
Process Loan step properties	Instructions in Step Processor: `Verify that all loan information is provided and accurate. Click Complete when you are done.` Activity Type: LoanProcessor work queue Parameters: • customer_na [Read] • interest_rate • loan_amount • loan_date [Read]

Verification

- Your workflow must validate and transfer without errors or warnings.
- Your workflow must include a launch step and two Activity steps. Your workflow map must look similar to the following diagram.



- You must be able to process the workflow through to completion.

Use Design mode to add workflow and step properties and to validate and launch a workflow: Walkthrough

Introduction

This exercise gives you practice in using basic workflow elements in Process Designer to define properties, validate, transfer, and launch a workflow.

Procedure 1: Add data fields to a workflow definition

1. Check out and open your workflow definition in Process Designer.
    a. On your student Windows XP system, log in to FileNet Workplace XT using the filenetadmin account listed in the "Lesson Overview" section.
    b. Click Tools > Advanced Tools > Process Designer.
    c. Click File > FileNet > FileNet Open/Checkout.
    d. Complete the Open a Workflow Definition wizard:
        i. Browse to the object store and folder as follows: LoanProcess > Workflows.
        ii. Select the `Loan Processing Workflow – Introduction` file.
        iii. Verify that Checkout is selected from the “Open As” option.
        iv. Click Open.
2. Add workflow data fields.
    a. If it is not already selected, click the Workflow Properties tab located in the bottom pane.
    b. Click the Data Fields tab.
    c. Add data fields as shown in the following table. Accept default values for all other parameters.

Data Field Name	Type	Expression
customer_name	String	“”
interest_rate	Float	0.0
loan_amount	Float	0.0
loan_date	Time	systemtime()

Procedure 2: Set step properties

1. Set step properties for LaunchStep.
    a. Click LaunchStep on the workflow map in order to select it.
    b. In the LaunchStep properties, click the General tab.

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

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

Selected Parameters	Access Rights
customer_name	Read/Write
loan_amount	Read/Write
loan_date	Read/Write

e. In the Instructions in Step Processor field, type the following: `Enter your loan information and click Launch when you are done.`

Hint

You can expand, collapse, and resize the bottom pane to adjust your view of the object properties tabs. Use the control arrows located above the Tabs menu or drag and reposition the border between the top and bottom panes.

2. Set step properties for the Verify Information step.

a. In the bottom pane, click Tabs > Steps > Verify Information.

b. Select the General tab.

c. Under Activity Type, verify that the Participants option is selected.

d. Click the Modify icon (the pencil icon) next to the Participants option.

e. In the Participant Selection window, search for and select the user olivia.

Tip: Click Users in the Show Available field. Type `o` in the "Starts with" field. Click Search. A list of account names with the initial letter "o" is displayed.

f. Click Add (single right arrow) to move olivia from the Available Participants list to the Selected Participants list.

g. Click OK to close the Participant Selection window.

h. In the Instructions in Step Processor field, type the following:

`Verify the customer information and fill in the current interest rate and loan date. Click Complete when you are done.`

i. Select the Parameters tab.

j. Use the right arrow to move all parameters from the Available Parameters list to the Selected Parameters list.

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

Selected Parameters	Access Rights
customer_name	Read
interest_rate	Read/Write
loan_amount	Read
loan_date	Read/Write

3. Set step properties for the Process Loan step.

   a. Click Process Loan on the workflow map.

   b. Select the General tab.

   c. Under Activity Type, select the Work Queue option and select LoanProcessor from the list.

   d. In the Instructions in Step Processor field, type the following:

   ```
   Verify that all loan information is provided and accurate. Click
   Complete when you are done.
   ```

   e. Select the Parameters tab.

   f. Use the right arrow to move all parameters from the Available Parameters list to the Selected Parameters list.

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

Selected Parameters	Access Rights
customer_name	Read
interest_rate	Read
loan_amount	Read
loan_date	Read

Procedure 3: Validate and correct errors in a workflow

1. Delete an incorrect workflow name.

   a. Click the Workflow Properties tab.

   b. On the General tab, delete the default name found in the Workflow Name field.

   c. Click LaunchStep on the workflow map.

   This action is simply to change the view of the object properties to prepare for the next step.

2. Validate the workflow.

   a. Click File > Validate Workflow Collection or click the Validate Workflow Collection button on the main toolbar.

   The Validation Results window displays at least one error.

b. In the Validation Results window, select the <no name> error from the Name field and click Go to, which takes you to the location of the error.

The object properties pane changes and the Workflow Properties General tab is displayed.

c. Leave the Validate Results window open while you correct the error in the next step.

3. Assign the correct Workflow Name and Subject.

a. On the General tab of Workflow Properties, type the following in both the Workflow Name and Subject fields: `Loan Processing`

b. Click the *Check workflow name* button located next to the Workflow Name field.

c. Verify that the Loan Processing workflow name is available.

d. Click OK.

4. Revalidate the workflow.

a. In the Validation Results window, click Revalidate.

b. If the workflow validation is successful, click Close in the message box. If the workflow validation is **not** successful, correct any errors and validate again.

Procedure 4: Transfer, launch, and process a workflow

1. Click File > Launch Main Workflow or click the Launch Main Workflow icon on the main toolbar.

Information

When you launch a workflow from Process Designer, the Launch Workflow command transfers an executable version of the workflow definition to the Process Engine database and launches the workflow.

2. Complete the “Checkin Workflow Definition” wizard.

a. Accept the default value for the Document Title.

b. Click Finish and wait for the Launch Step processor to open.

3. Complete the Launch Step processor, save the workflow, close Process Designer, and log out.

a. In the Launch Step window, type a customer_name, loan_amount, and loan_date.

Tip: To enter the loan_date, you can type directly in the field or use the calendar tool.

b. Click Launch.

dc. In Process Designer, click File > Close.

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

e. Click File > Exit.

f. Close the applet window.

g. Log out of Workplace XT.

4. Process the Verify Information step assigned to user olivia.

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

b. Click Tasks.

c. Click the Loan Processing name to open the Verify Information task.

d. Notice that you are allowed to change the values of the interest_rate and loan_date fields.

In the previous procedure, you set the step properties for the Verify Information step and assigned Read/Write access rights to the interest_rate and loan_date fields. This action makes the fields available for data entry.

e. Type an amount of your choice in the interest_rate field.

f. Click Complete.

g. Log out of the olivia account from Workplace XT.

5. Process the Process Loan step.

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

b. Click Tasks > Public Inboxes > LoanProcessor

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

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

e. Click Complete.

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