Lesson: Workflow collections

Overview

Why is this lesson important to you?

You are designing an IBM FileNet BPM solution. Your solution includes a number of related workflow processes. You want an efficient way to organize and manage your workflow definitions. You build a workflow collection containing multiple processes.

Activities

- Build and manage a workflow collection: Challenge
- Build and manage a workflow collection: 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. If you have not already started the IBM FileNet P8 software on your system, 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	p8admin	IBMFileNetP8

Note

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

Build and manage a workflow collection: Challenge

Challenge

Build a workflow collection. Launch and process the workflow collection. Use the data in the table to complete this activity.

Data

Item	Value
Main workflow workflow definition file	LoanProcess > Workflows > Loan Processing Workflow - Waiting Workflow
Second workflow definition file	LoanProcess > Workflows > Waited-For Bank Statement Workflow
Workflow collection name	Loan Processing Collection
New file name in the Object Store	LoanProcess > Workflows > Loan Processing Workflow Collection

Verification

- The workflow collection must include the following workflows.
  - Loan Processing Workflow
  - Bank Statement Workflow
- You must launch and process the main workflow through to completion.

Build and manage a workflow collection: Walkthrough

Introduction

This exercise gives you practice in building and managing a workflow collection.

Procedure 1: Build a workflow collection from two existing workflows

In this procedure, you open two workflow definition files that you previously saved to the object store. You build a new workflow collection containing these two workflows.

1. On your student Windows XP system, log in to FileNet Workplace XT using the p8admin user account listed in the "Lesson Overview" section.
2. Open the Bank Statement Workflow workflow definition file you saved in the previous lesson activity.
   a. In Workplace XT, click Tools > Advanced Tools > Process Designer.
   b. Click File > FileNet > FileNet Open/Checkout.
   c. Locate and select the following file:
      LoanProcess > Workflows > Waited-For Bank Statement Workflow
   d. Select “Open As Checkout” and click Open.

Important

This file is the workflow definition file that you built and saved to the object store in the previous lesson. If you did **not** successfully complete all steps in the previous lesson activity, then you must open the following starting file located on the local disk:

C:\Labs\F145\Solutions\MultipleWorkflows\
Bank Statement Workflow - Multiple Workflows - Dependent solution.pep

   e. If necessary, explore the workflow definition to refamiliarize yourself with the process flow.
3. Insert the previously saved Loan Processing workflow definition to build a collection.
   a. Click File > Insert > Workflow from Repository.
   b. Locate and select the following file:
      LoanProcess > Workflows > Loan Processing Workflow - Waiting Workflow

Important

This file is the workflow definition file that you built and saved to the object store in the previous lesson. If you did **not** successfully complete all steps in the previous lesson activity, then you must open the following starting file located on the local disk:

C:\Labs\F145\Solutions\MultipleWorkflows\
Loan Processing - Multiple Workflows - Dependent solution.pep

c. If necessary, explore the workflow definition to refamiliarize yourself with the process flow.

- Notice that the Loan Processing workflow is displayed in a separate work area tab, which is labeled with the Workflow Name Property, Loan Processing - Multiple Workflows.
- Notice that the Prepare Loan and Process Loan submap steps are assigned to the EMPTY MAP submap, which contains no steps. Therefore, the Prepare Loan Map and Process Loan Map submaps are not executed if the workflow is launched.

4. Add the collection to the object store in a new file.

a. Click File > FileNet Add New.

b. In the message window, select “Cancel the checkout and continue with FileNet Add New” and click OK.

c. When prompted, complete the “Save the workflow definition to an object store” wizard using the following information.

- Object store: `LoanProcess > Workflows`
- Document Title: `Loan Processing Workflow Collection`
- Security: <Accept default values.>

Information

After you save the workflow collection to the object store, notice that the status bar displays the new collection file name: Loan Processing Workflow Collection.

d. Minimize Process Designer.

5. Verify the new file MIME type.

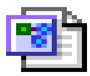
a. In FileNet Workplace XT, browse to LoanProcess > Workflows.

b. Locate the Loan Processing Workflow Collection file that you added to the object store.

Note

You might need to refresh your browser to see the new file in the Workflows folder.

c. Notice that the icon displayed for this file looks like this one:



d. Hover your mouse pointer over the icon and notice the that the MIME type is displayed as follows: application/x-filenet-xpdlworkflowdefinition.

Because the file contains more than one workflow, it was saved as an XPDL file.

Procedure 2: Specify collection properties and the main workflow

1. Return to Process Designer.
2. Specify workflow collection properties.
   a. Click File > Workflow Collection Properties.
   b. In the Workflow Collection Properties window, define the following properties:
      - Name: `Loan Processing Collection`
      - Application Space: DefaultApplication
      - Description: `Collection for loan processing and bank statement workflows.`

   c. Click OK to close the Workflow Collection Properties window.
3. Specify the main workflow.

   Notice that the symbol for the main workflow is displayed in the work area tab for the Bank Statement Workflow. You must reset the main workflow to be Loan Processing - Multiple Workflows.

   a. Select the tab for Loan Processing - Multiple Workflows, if it is not already selected.
   b. Click Action > Set as Main Workflow.

Procedure 3: Launch the workflow collection

1. Validate and launch the workflow collection.
   a. Click File > Validate Workflow Collection.

      Verify that the validation is successful. Correct validation errors, if any.

   b. Click File > Launch Main Workflow.
   c. Click OK in both Check workflow name windows.

d. If the wizard is displayed, complete the “Checkin Workflow Definition” wizard using the following information.
   - Document Title: `Loan Processing Workflow Collection`
   - Security: <Accept default values.>

2. Complete the Launch Step processor.
   a. In the Launch Step window, click Data Fields.
   b. In the Data Fields view, type the following values in the fields.
      - customer_name: `Will White`
      - down_payment: `14000.`
      - loan_date: <a future date and time>
      - loan_id: `W222`
      - loan_term: `15`
      - purchase_price: `125000.`
   c. In the Attachments view, assign an attachment of your choice to loan_document.
   d. Click Launch.

3. Verify that the Bank Statement Workflow (the waited-for workflow) was launched.
   a. In Process Designer, select Tools > Process Administrator.
   b. Construct and execute a search for the created work item in the BankStatementRoster using the following information.

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

   c. Verify that the created work item appears in the results pane and is in the LoanProcessor queue.

4. Process the Bank Statement Workflow.
   a. In the results pane, select the row containing the work item in the LoanProcessor queue.
   b. Click Open Step Processor on the results pane toolbar.
   c. Verify that CustomerID contains the value `Will White`.
   d. Select the “Have bank statements” response.
   e. Assign documents of your choice to the BankStatements attachment array.
   f. Click Complete.
   g. Click Find Now to reexecute the roster search of BankStatementRoster.

h. In the results pane, notice that the work item is in the LoanUnderwriter queue and the StatementStatus field contains the value “Have bank statements”.

The Bank Statement Workflow has satisfied Condition 1 in the waiting workflow. Therefore, the waiting workflow (Loan Processing - Multiple Workflows) is available for processing the next workflow step, which in this case is the Complete Loan Package step. To expedite testing, you first complete processing of the Bank Statement Workflow and then you complete processing of the waiting workflow.

i. In the results pane, select the row containing the work item in the LoanUnderwriter queue.

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

k. Click Complete.

5. Complete processing of the Loan Processing workflow.

a. Construct and execute a search for the work item using the following information.

Search criteria	**Value**
Look for	Work Items
In	Workflow Roster
Select one	LoanRoster
Search mode	Edit (all fields)
Criteria	`loan_id = ‘W222’`

b. In the results pane, select the row containing the work item in the LoanUnderwriter queue.

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

d. Click Complete.

e. Click Find Now to reexecute the roster search of LoanRoster.

f. In the results pane, select the row containing the work item in the LoanCustomer queue.

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

h. Click Complete.

i. Click Find Now to reexecute the roster search of LoanRoster.

j. In the results pane, select the row containing the work item in the LoanUnderwriter queue.

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

l. Click Complete.

m. Click Find Now to reexecute the roster search of LoanRoster.

n. Verify that the work item is no longer listed in the results pane.

The Loan Processing workflow is complete.

6. Close all applications.

   a. Close Process Administrator.

   b. Return to Process Designer.

   c. If you have not already done so, check in your final version of the workflow definition. Otherwise, close the file and cancel the checkout.

   d. Exit Process Designer.

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