Lesson: Workflow creation

Overview

Why is this lesson important to you?

You are designing an IBM FileNet BPM solution. In your workflow process, you need to launch another independent workflow process and assign the initial data field values. You use a Create system step. You must test the workflow to verify the changes.

Activities

- Define a workflow that launches an independent workflow: Challenge
- Define a workflow that launches an independent workflow: 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. 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.

Read this first

Before attempting these unit activities, you must successfully complete all procedures in Unit 2 *Workflow Infrastructure*, Lesson 2.1 Region structures. All remaining lessons in this course require specific region data structures to already be configured.

Important

If you already successfully completed Unit 2 Lesson 2.1 Region structures, skip the following steps and proceed with this unit.

If you did **not** successfully complete Unit 2 Lesson 2.1, do the following steps.

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. In Workplace XT, click Tools > Administration > Process Configuration Console.
3. Double-click the PELoanRegion[8] node to connect to the region.
4. Click Action > Import from XML file.
5. Click Browse and open the following file: C:\Labs\F145\Solutions\Infrastructure\PELoanRegion8_ConfigStart.xml
6. Select the Overwrite option.
7. Click Import.
8. Click Yes in the confirmation window.
9. Click Close.
10. Click File > Exit and close the applet window.
11. Sign out of Workplace XT and close the browser.

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.

Define a workflow that launches an independent workflow: Challenge

Challenge

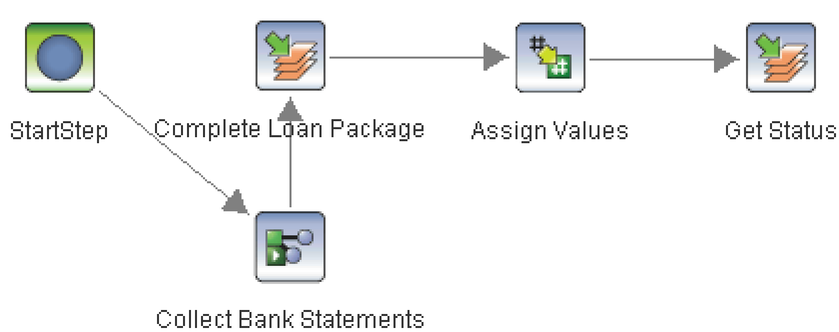
Transfer the Bank Statement Workflow (the created workflow) that collects supporting documents for the loan processing workflow. Add a Create system step to the Complete Loan Map submap of the Loan Processing workflow. The CustomerID field in the created workflow is assigned the value of the customer_name field in the creating workflow. Use the data in the table to complete this activity.

Data

Item	Value
Created workflow definition file	C:\Labs\F145\MultipleWorkflows\ Bank Statements Workflow.pep
Creating workflow definition file	C:\Labs\F145\MultipleWorkflows\ Loan Processing - Creation Start.pep
Create system step properties	• Step Name: `Collect Bank Statments` • Workflow Name: Bank Statement Workflow • Assignments: - Name: `CustomerID` - Expression: `customer_name`
File name in the Object Store	LoanProcess > Workflows > Loan Processing - Creation

Verification

- You must launch and process the creating workflow through to completion.
- The created workflow must be launched by the creating workflow.
- The Complete Loan Map submap for the creating workflow must look similar to the following diagram. This diagram includes a Create system step.



Define a workflow that launches an independent workflow: Walkthrough

Introduction

This activity gives you practice in using the Create system step in a workflow definition.

Procedure 1: Transfer the prepared created workflow

In this procedure, you transfer a workflow definition that is referenced as a created workflow in the next procedure. This created workflow collects and prepares bank statements in support of the Loan Processing workflow that you have worked with in previous units in this course.

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 a prepared workflow definition file.
   a. In Workplace XT, click Tools > Advanced Tools > Process Designer.
   b. Click File > Open.
   c. Locate and open the following file:
      C:\Labs\F145\MultipleWorkflows\Bank Statement Workflow Start.pep
   d. Explore the workflow definition to familiarize yourself with the process flow and notice the following items:
      - This workflow collects customer bank statements to be used as supporting documents in the Loan Processing workflow that you built in previous units.
      - In this workflow, the loan processor collects and attaches bank statements in the Prepare Bank Statements step.
      - The Workflow Name property is defined as Bank Statement Workflow.
      - The workflow is assigned to use a different roster and event log than the Loan Processing workflow: BankStatementRoster and BankStatementLog. These region data structures have been previously created for you.
      - The workflow data field called CustomerID holds information about the loan customer.
      - The attachment array field called BankStatements is a workflow property that contains the documents collected in the Prepare Bank Statements step.
      - The LaunchStep assigns the CustomerID parameter.
3. Validate and transfer the workflow definition.
   a. Validate the workflow and correct validation errors, if any.
   b. Click File > Transfer Workflow Collection.
      Do **not** launch the workflow.

c. When prompted, complete the “Save the workflow definition to an object store” wizard using the following information.
   - Object store: `LoanProcess > Workflows`
   - Document Title: `Bank Statement Workflow`
   - Security: <Accept default values.>

d. Click Close in the Transfer Workflow window.

e. Click File > Close and select Cancel the checkout.

Procedure 2: Add a Create step to a workflow definition

In this procedure, you add a Create step to the Loan Processing workflow. The Create step references the Bank Statement Workflow that you transferred in Procedure 1. To save time in class, a workflow definition file has been prepared for you that contains the Loan Processing workflow. This workflow is similar to the one that you worked with in previous units in this course. However, the timer and deadlines were removed so as not to interfere with testing the new Create step features. In this activity, you modify and test the Complete Loan Map submap.

1. Open a prepared workflow definition file.

   a. Click File > Open.

   b. Locate and open the following file:

   C:\Labs\F145\MultipleWorkflows\Loan Processing - Creation Start.pep

   c. Explore the workflow definition to familiarize yourself with the process flow and notice the following items:
      - This workflow is for loan processing and is similar to the one that you worked with in previous units.
      - The Workflow map contains three submap steps.
      - 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. You work only with the Complete Loan Map submap in this activity. This technique is used to save time when you test the workflow.
      - The workflow name property has the value Loan Processing - Multiple Workflows.

2. Add a Create step and assign properties.

   a. On the map toolbar, select Complete Loan Map.

   b. Drag a Create step from the General System Palette and place it below the Complete Loan Package step.

c. Assign the following step properties to the new Create step.

- Step Name: `Collect Bank Statements`
- Workflow Name: Bank Statement Workflow
- Assignments

Name	Expression
CustomerID	`customer_name`

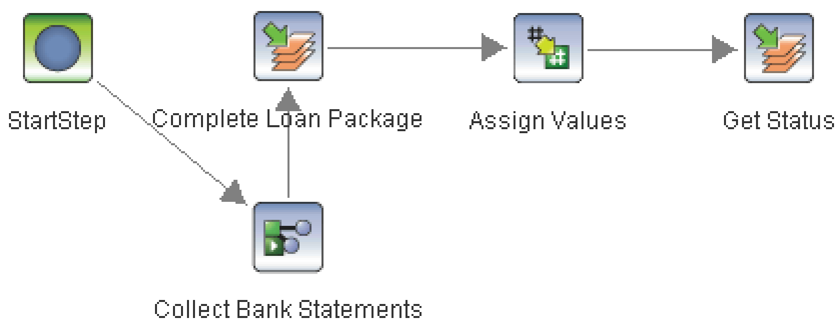
3. Draw new routes.

a. Right-click the route between StartStep and the Complete Loan Package step and click Delete.

b. Draw a route from StartStep to Collect Bank Statements.

c. Draw a route from Collect Bank Statements to Complete Loan Package.

d. Verify that your Complete Loan Map map looks similar to the following diagram. This diagram includes a Create system step.



Procedure 3: Test the creating workflow

1. Launch and save the workflow definition to the object store.

a. Validate the workflow and correct validation errors, if any.

Note

When you validate, you might receive the following validation warning: "`Create instruction references work class, Bank Statement Workflow, but no work class of that name was found with the transfer flag set in the workflow collection. Using the definition previously transferred to the server.`"

Ignore this warning message and close the validation window. Proceed with the next step in this procedure. You learn about workflow collections in a later lesson in this unit.

b. Click File > Launch Main Workflow.

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 - Creation`
   - 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: `Connie Connor`
   - down_payment: `12000.`
   - loan_date: <a future date and time>
   - loan_id: `C888`
   - loan_term: `30`
   - purchase_price: `115000.`

   c. In the Attachments view, assign an attachment of your choice to loan_document.

   d. Click Launch.

3. Use Process Administrator to locate the work item for the Loan Processing workflow.

   a. In Process Designer, select Tools > Process Administrator.

   b. Construct and execute a filtered search of LoanRoster by using the loan_id exposed field and the data in the following table.

Search criteria	Value
Look for	Work Items
In	Workflow Roster
Select one	LoanRoster
Search mode	Edit (all fields)
Criteria	`loan_id = ‘C888’`

   c. Verify that your work item appears in the results pane and is in the LoanUnderwriter queue.

4. Verify that the Bank Statement Workflow (the created workflow) was launched.

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

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

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

   The CustomerID field contains the name you assigned in step 2b.

5. 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 `Connie Connor`.

      The value of CustomerID in the Bank Statement Workflow was assigned using the customer_name field from the creating workflow, Loan Processing - Multiple Workflows.

   d. If you want, assign documents of your choice to the BankStatements attachment array.

      Tip: You can find sample documents in the LoanProcess > Financial Documents Upload folder on the object store.

   e. Click Complete.

   f. Click Find Now to reexecute the roster search of BankStatementRoster.

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

6. Complete the remaining steps in the Loan Processing workflow.

   a. Construct and execute a filtered search of LoanRoster by using the loan_id exposed field and the data in the following table.

Search criteria	**Value**
Look for	Work Items
In	Workflow Roster
Select one	LoanRoster
Search mode	Edit (all fields)
Criteria	`loan_id = ‘C888’`

   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. The interest_rate field at the Get Status step is 0.0 because you did not process the Prepare Loan Map submap where this field is assigned.

i. Click Complete.

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

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

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

m. Click Complete.

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

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

7. 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, cancel the checkout.

   d. Exit Process Designer.

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