Lesson: Workflow subscriptions

Overview

Why is this lesson important to you?

You are implementing an IBM FileNet BPM solution. A workflow must be launched automatically when a certain incoming document is received. The document is then used in the workflow. To accomplish this scenario, you must create a workflow subscription to launch the workflow with an initiating attachment.

Activities

- Create a workflow subscription that uses an initiating attachment: Challenge
- Create a workflow subscription that uses an initiating attachment: 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.

User accounts

Type	User ID	Password
FileNet Workplace XT	filenetadmin	IBMFileNetP8
FileNet Workplace XT	olivia	filenet
FileNet Enterprise Manager	filenetadmin	IBMFileNetP8

Note

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

Create a workflow subscription that uses an initiating attachment: Challenge

Challenge

Add an initiating attachment to the workflow that you saved in the last lesson. Transfer and save changes to the object store. Create a workflow subscription that uses the initiating attachment to launch the workflow. Test the workflow subscription. Use the data in the table to complete this exercise.

Data

Item	Value
Folder location for the document in the object store	LoanProcess > Workflows
Document title in the object store	Loan Processing Workflow - Introduction
Initiating attachment fields	• Name: loan_document • Value: <none> • Description: Loan
Content Engine document class and properties	Class Name: Loan Required properties: • CustomerName • LoanAmount • LoanDate

Workflow subscription	• Target class: Object Stores > LoanProcess > Document > Loan
	• Subscription Name and Description: `Loan Process Autolaunch`
	• Initial State: Enabled
	• Enable Manual Launch: No
	• Subscribed Events: Creation Event
	• Event Expression: <none>
	• Property Maps:
	`customer_name = CustomerName`
	`loan_amount = LoanAmount`
	`loan_date = LoanDate`
	• Security: <Accept default values>

Verification

- After you add a new Loan document that contains values for CustomerName, LoanAmount, and LoanDate, you must see a Loan Process Workflow task in olivia’s Inbox waiting at the Verify Information step.
- After you open the task in olivia’s Inbox, the Loan document values for CustomerName, LoanAmount, and LoanDate must appear in the respective customer_name, loan_amount, and loan_date fields in the step processor.
- You must be able to process the workflow through to completion.

Create a workflow subscription that uses an initiating attachment: Walkthrough

Introduction

This exercise gives you practice in creating and using a workflow subscription and an initiating attachment.

For your convenience and use in this exercise, the Loan document class and properties have been created on the Content Engine.

Procedure 1: Define an initiating attachment in a workflow

1. Open your saved workflow definition in Process Designer.
   a. On your student Windows XP system, log in to 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. Locate and check out the following file on the object store:

      LoanProcess > Workflows > Loan Processing Workflow - Introduction

2. Define and use an initiating attachment.
   a. In the Workflow Properties tab, click Attachments.
   b. Add an attachment, using the following information.
      - Name: `loan _ document`
      - Value: <none>
      - Description: `Loan application`
   c. Click the Initiating Attachment icon in the top right corner of the Attachments screen to designate the loan_document as an initiating attachment.
   d. Select LaunchStep on the workflow map.
   e. In the General tab, verify that the loan_document parameter was automatically added to the Selected Parameters list of the LaunchStep with Read/Write access.

      If it was not, add the parameter.
   f. Using the Parameters tab, add the loan_document attachment to the Selected Parameters of **both** the Verify Information and Process Loan steps.

      Assign **Read** access rights in both cases.

3. Transfer and save the workflow definition to the object store.
   a. Validate the workflow and correct any validation errors.
   b. Transfer the workflow.

Do **not** launch the workflow.

c. Complete the "Checkin Workflow Definition" wizard that automatically runs when you transfer using the following information.

Document Title: `Loan Processing Workflow – Introduction`
Security: <Accept default values>

d. Click File > Exit to close Process Designer.

e. In the message box, select "Cancel the checkout" and click OK.

f. Close the applet window.

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

Procedure 2: View Content Engine document class and properties

1. Open FileNet Enterprise Manager.
   a. Double-click the shortcut for FileNet Enterprise Manager Administration Tool found on the student Windows XP client desktop.
   b. Select the filenetadmin user and click Connect.
   c. If you are asked for a password, enter the password for the filenetadmin account listed in the "Lesson Overview" section and click OK.
   d. Wait several seconds while FileNet Enterprise Manager starts.
2. View Loan document class properties on the Content Engine.
   a. Expand the Object Stores node to display all object stores.
   b. Expand the LoanProcess object store node.
   c. Select the Document Class node under LoanProcess.
   d. Right-click Loan class in the right pane and click Properties.
   e. In the Loan Class Properties window, select Property Definitions.
   f. Notice the following three properties in the list: CustomerName, LoanAmount, and LoanDate.
   g. Click Cancel.
   h. Click File > Exit to close FileNet Enterprise Manager.

Procedure 3: Create a workflow subscription

1. Log in to FileNet Workplace XT using the filenetadmin account listed in the "Lesson Overview" section.
2. Open and complete the Add Workflow Subscription wizard. a.

   Click Tools > Advanced Tools > Workflow Subscriptions > Add.

db. Complete the wizard steps using the information in the following table.

- For all properties not listed, accept default values.

Wizard step	Property	Value
1	Target class	Object Stores > LoanProcess > Document > Loan
2	Workflow to launch	LoanProcess > Workflows > Loan Processing Workflow - Introduction In this wizard step, do the following: • Click “Browse/Search for Workflow Definition.” • Navigate to LoanProcess > Workflows folder. • Click “Select from Versions” below the description of the workflow. • Click Select below the description of
3	Name	Loan Process Autolaunch
	Description	Autolaunch the Loan Processing workflow
	Initial State	Enabled
	Enable Manual Launch	No
	Subscribed Events	Creation Event
4	Event Expression	<none>

5	Property Map	`customer_name = CustomerName`
		`loan_amount = LoanAmount`
		`loan_date = LoanDate`

6	Security	<Accept default values.>

Procedure 4: Test a workflow subscription

1. Add a new Loan document.

   a. Browse to the LoanProcess > Loans folder.

b. Click Add Document and complete the wizard using the following information.

  - Accept the default value for all fields not otherwise specified.
    - Type: No Content
    - Class: Document > Loan
    - Major version: Checked
    - Document Title: `Loan for Charles Connor`
    - CustomerName: `Charles Connor`
    - LoanAmount: `5000`
    - LoanDate: `<Current date>`

c. Verify that the new document appears in the Loans folder.

2. Verify that the Loan Process Workflow was launched.

   a. Click Tasks > My Active Workflow.

   b. Verify that My Active Workflows contains a task called Loan Processing and the current step is Verify Information.

3. Verify that the workflow subscription property mapping occurred.

   a. In the Browse page, click Tools > Administration > Process Administrator.

   b. Construct and execute a roster search by using the data in the following table.

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

   c. In the results pane, locate the work item for the workflow that was launched in the previous procedure. (F_StartTime is the date and time you added the Loan document and the workflow was launched. F_Subject is Loan Processing.)

   d. Scroll across the result pane to view the values of all the fields.

   e. Verify that the customer_name, loan_amount, loan_date, and loan_document fields are completed and contain the correct values from the Loan document properties.

4. Complete processing of the workflow using Process Administrator.

   a. In the results pane, select the row containing the work item.

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

   c. If you want, view the loan_document attachment information.

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

   e. Click Complete.

   f. Click Find Now to reexecute the search in Process Administrator.

dg. In the results pane, select the row containing the work item.

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

i. Click Complete.

j. Close Process Administrator.

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