Lesson: Workflow steps

Overview

Why is this lesson important to you?

As a designer of an IBM FileNet BPM solution, you need to use various types of steps in your workflow definition in order to accomplish specific tasks, including system steps. Because your organization requires a customized user interface for participants that are processing some tasks, you must assign a step processor. You must test the workflow to verify the changes.

Activities

- Define and configure steps in a workflow: Challenge
- Define and configure steps in 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.

User accounts

Type	User ID	Password
FileNet Workplace XT	filenetadmin	IBMFileNetP8
FileNet Workplace XT (member of Loan Guests group)	gail	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 and configure steps in a workflow: Challenge

Challenge

Use the data in the table to complete the following tasks.

- Define a workflow data field called status.
- Add an Assign system step to the map. Add a route so that the Assign step is executed after the Complete Loan step.
- Add an activity step called Get Status. Add a route so that the Get Status step is executed after the Assign step.
- Assign the launch processor for the LaunchStep.
- Add the Get Status step to My Palette and save My Palette to a local file.
- Test the workflow definition.

Data

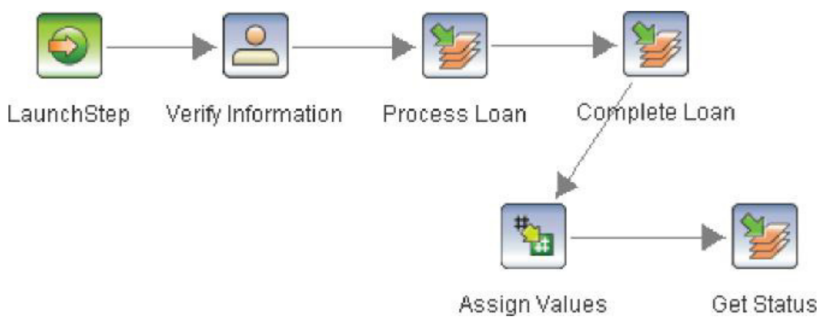
<table>
<tr><th>Item</th><th>Value</th></tr>
<tr><td>Workflow definition file</td><td>Object store > LoanProcess > Workflow > Loan Processing Workflow - Infrastructure</td></tr>
<tr><td>Workflow data field</td><td>• Name: <code>status</code>
• Type: String</td></tr>
<tr><td>Assign system step properties</td><td>Name: <code>Assign Values</code>

Assignment Parameters
<table><tr><th>Name</th><th>Expression</th></tr><tr><td><code>status</code></td><td><code>"Loan processing for " + customer_name + " is completed."</code></td></tr><tr><td><code>F_Subject</code></td><td><code>status</code></td></tr></table></td></tr>
<tr><td>Get Status step properties</td><td>• Activity Type: LoanCustomer work queue
• Instructions: <code>This is your loan status. If you have questions, call customer service.</code>
• Selected Parameters:
- customer_name [Read]
- interest_rate [Read]
- loan_amount [Read]
- loan_document [Read]</td></tr>
<tr><td>LaunchStep property</td><td>Step Processor: Launch HTML (FileNet)</td></tr>
</table>

Item	Value
My Palette file properties	• File name: MyPalette • Local file path: C:\Labs\F145\Infrastructure
User account to test Get Status step	User ID: gail (Gail is a member of the Loan Guests group.)

Verification

- You must launch and process the workflow through to completion.
- At the Get Status step, the workflow name displayed in the Inbox must be “Loan processing for customer_name is completed.”
- Your workflow map must look similar to the following diagram. This diagram shows six steps with text annotations hidden.



Define and configure steps in a workflow: Walkthrough

Introduction

This exercise gives you practice in working with workflow steps. You add a new system step to a prepared workflow definition. You set properties for a work queue step. You assign a step processor. You create and save a custom step palette, called My Palette.

Procedure 1: Add a system step to a map

Information

Use the Show/Hide Text Annotations option located on the right end of the status bar. This display option allows you to hide the text annotations on your Workflow map, which reduces visual clutter and makes it easier to focus on the steps and routes.

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 the loan processing workflow definition file you saved in the previous exercise.
   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 > Loan Processing Workflow - Infrastructure
   d. Select **"Open As Checkout"** and click Open.
3. Define a new workflow data field.
   a. In Workflow Properties, click Data Fields.
   b. Add a new data field using the following information.
   - Name: `status`
   - Type: String
4. Add and configure an Assign step.
   a. Open the Palette menu, and select the check box to display the General System step palette, if it is not already selected.
   b. From the General System step palette, drag an Assign step onto the workflow map and place it after the Complete Loan step.
   c. Replace the default step name with the following text: `Assign Values.`

d. On the General tab, under Assignment Parameters, click in the first cell of the Name field and select `status` from the list.

e. In the first cell of the Expression field, type the following:

```
"Loan processing for " + customer_name + " is completed."
```

f. In the second cell of the Name field, type the following:

```
F_Subject
```

You cannot select F_Subject from the Name list because it is a system field. You must type `F_Subject` into the Name field.

g. In the second cell of the Expression field, type the following:

```
status
```

h. Verify that your Assignment Parameters are set as shown in the following table.

Name	Expression
status	`"Loan processing for " + customer_name + " is completed."`
F_Subject	status

5. Add an activity step.

a. Drag an Activity step onto the workflow map and place it after the Assign Values step.

b. Replace the default step name with the following text: `Get Status`

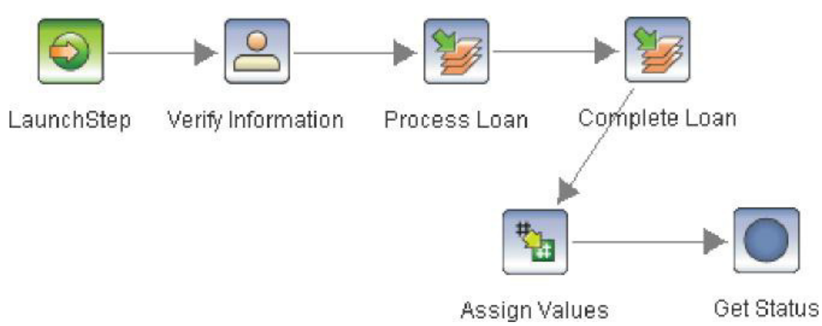
6. Draw routes and verify the map.

a. Draw a route from the Complete Loan step to the Assign Values step.

b. Draw a route from the Assign Values step to the Get Status step.

Tip: To have a cleaner view of the map, you can hide text annotations by clicking the Show/Hide Text Annotations icon located at the right on the status bar.

c. Verify that your workflow map looks similar to the following diagram. This diagram shows six steps with text annotations hidden.



Procedure 2: Set step properties

1. Set step properties for Get Status step.

   a. Select the Get Status step.

   b. On the General tab in the Properties pane, set step properties using the following information:

   - Step Name: Get Status
   - Activity Type: LoanCustomer Work Queue
   - Participant
   Privileges: - Reassign:
   Cleared - View Status:
   Cleared - View History:
   Cleared
   - Step Processor: Approval HTML (FileNet)
   - Instructions in Step Processor: `This is your loan status. If you have questions, call customer service.`

   c. On the Parameters tab, assign the Selected Parameters using the following information:

   - customer_name [Read]
   - interest_rate [Read]
   - loan_amount [Read]
   - status [Read]

2. Assign the step processor for the launch step.

   a. Select the LaunchStep.

   b. On the General tab in the Properties pane, select Launch HTML (FileNET) under Step Processor.

Procedure 3: Create and save a custom step palette

1. Add a custom step to My Palette.

   a. Right-click the Get Status step and click Add to My Palette.

   b. Open the Palette menu, and select the check box to display the My Palette step palette, if it is not already selected.

   c. On the Palette menu, click Open Palette Window.

   d. Notice that the Get Status step is displayed in My Palette.

   e. Close the Palette window.

2. Save My Palette to a local file.

   a. In the Palette menu, click My Palette > Save As.

   b. Save to the following location: C:\Labs\F145\Infrastructure\MyPalette.xml

c. Notice that the file name appears at the bottom of the Process Designer window above the status bar and next to the workflow definition file name.

Procedure 4: Launch and test the workflow

1. Launch and save the workflow definition to the object store.
   a. Validate the workflow and correct validation errors, if any.
   b. Click File > Launch Main Workflow.
   c. Complete the "Checkin Workflow Definition" wizard using the following information.
      - Document Title: `Loan Processing Workflow – Infrastructure`
      - Security: <Accept default values.>
2. Complete the Launch Step processor.
   a. In the Launch Step window, notice that the launch processor is not the default Approval Launch HTML processor that you used in previous lesson activities.
   b. Click Data Fields to display the data fields.
   c. In the Data Fields view, type the following values in the fields:
      - customer_name: `Mary Garcia`
      - loan_amount: `3500`.

   d. Click Launch.
3. Use Process Administrator to locate the work item.
   a. In Process Designer, select Tools > Process Administrator.
   b. Construct and execute a filtered 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)
Criteria	`F_Subject like '%Mary Garcia%'`

   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.
4. Complete the Verify Information step.
   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.

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

d. Click Complete.

5. Complete the Process Loan step.
   a. In Process Administrator, click Find Now to reexecute the roster search.
   b. In the results pane, select the row containing the work item in the LoanProcessor queue.
   c. Click Open Step Processor on the results pane toolbar.
   d. Click Complete.
6. Complete the Complete Loan step.
   a. In Process Administrator, click Find Now to reexecute the roster search.
   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.
7. Verify that the Assign Subject system step was performed correctly.
   a. In Process Administrator, click Find Now to reexecute the roster search.
   b. Verify that your work item is in the LoanCustomer queue and contains the following subject: “Loan processing for Mary Garcia is completed.”

      Tip: If your work item does not appear in the results pane, verify that you have constructed the roster search criteria correctly. You must type the percent symbol (%) before and after the customer name as shown in step 3b.
   c. Close Process Administrator.
8. Close applications.
   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.
9. Sign in as gail, a customer, and complete the Get Status step.
   a. Log in to Workplace XT using the gail user account listed in the "Lesson Overview" section.

      Gail is a member of the Loan Guests group, which is assigned Query and Process access rights to the LoanCustomer queue.

b. Click Tasks > Public Inboxes.

c. Verify that the only public inbox listed is LoanCustomer.

d. Click LoanCustomer.

e. In the LoanCustomer public inbox, click the Loan Processing task name to open the Get Status task.

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

g. Click Complete.

h. Log out the user gail from Workplace XT and close the browser window.