Lesson: Testing a workflow

Overview

Why is this lesson important to you?

You are implementing an IBM FileNet BPM solution. You want to test your workflow definition by using administration and tracking tools to follow the progress of the executing workflow and view its properties at each step.

Activities

- Test a workflow definition: Challenge
- Test a workflow definition: 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

Note

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

Test a workflow definition: Challenge

Challenge

Launch the workflow definition that you saved in the last lesson. Process the workflow through all steps to completion. As you process each step in the workflow, use Process Administrator and Process Tracker to view the status and information about the workflow and work items. Use the data in the table to complete this exercise.

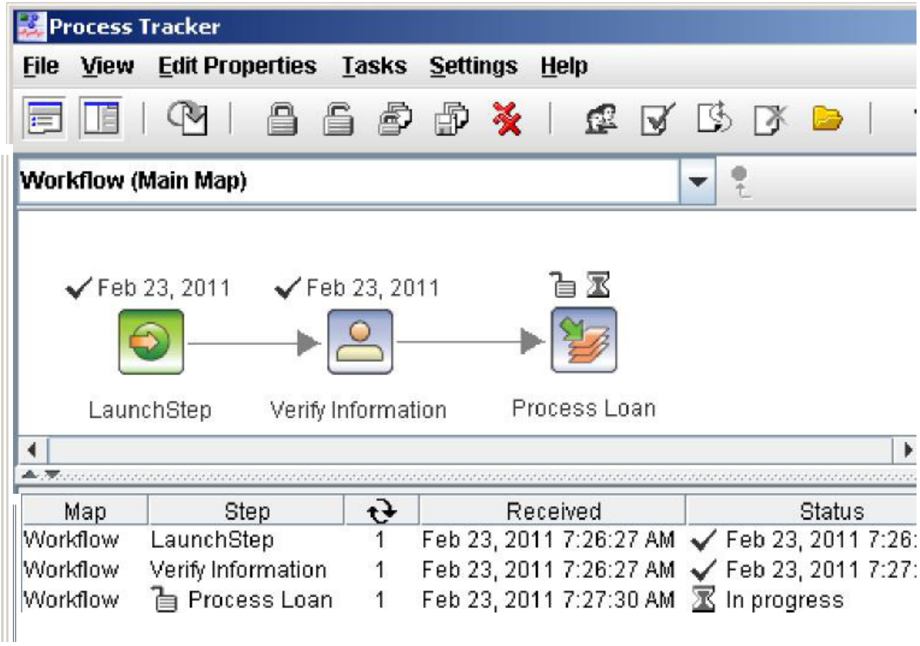
Data

Item	Value
Folder location for the document in the object store	LoanProcess > Workflows
Document title in the object store	Loan Processing Workflow - Introduction

Verification

- You must be able to process the workflow through to completion.
- You must be able to locate all work items in all queues at each step in the process by using Process Administrator.
- In Process Tracker, the Workflow History must look similar to the following diagram after completing the Verify Information step. This

diagram shows that the Process Loan step is in progress and the work item is unlocked.



Test a workflow definition: Walkthrough

Introduction

This exercise gives you practice in using Process Administrator and Process Tracker to test, track, and view properties of an executing workflow.

Procedure 1: Launch a workflow definition

1. On your student Windows XP system, log in to Workplace XT using the filenetadmin account listed in the "Lesson Overview" section.
2. Browse to locate the following file: LoanProcess > Workflows > Loan Processing - Introduction.
3. Right-click Loan Processing Workflow - Introduction and click Launch.
4. In the Launch Workflow window, click the Launch link located under the document title.
5. Complete the Launch Step processor.
   a. In the Launch Step window, replace the subject in the Subject field with the value `Test Workflow`.
   b. In the Launch Step window, type a customer_name and loan_amount of your choice.
   c. Click Launch.

Procedure 2: Use Process Administrator to locate a work item

1. Click Tools > Administration > Process Administrator to start Process Administrator.

Information

You can also start the Process Administrator tool when you are using Process Designer in Design mode. On the Process Designer toolbar, click Tools > Process Administrator and a new window opens with Process Administrator. To start Process Administrator, you must be a member of the PWAdministrator access role.

2. Construct a roster search by using the data in the following table and click Find Now to execute the search.

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

3. View the roster search results.
   a. In the results pane, locate the work item for the workflow that you launched in the previous procedure. (F_Subject is Test Workflow and F_StartTime is the date and time that you launched the workflow.)
   b. Scroll across the result pane to view the values of all the fields.
   c. Locate the Queue column and notice that the work item is assigned to the Inbox(0) queue.
   d. Locate the F_BoundUser column and notice that the work item is assigned to olivia.

   F_BoundUser is a system-defined field that contains the name of the user account that is assigned to process the work item.

   e. Notice that the values of the customer_name and loan_amount data fields are the same values that you entered in the Launch Step processor.

Procedure 3: Complete steps and view work item status

1. Complete a step in Process Administrator.
   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.
   c. In the Verify Information step processor window, type a value of your choice in the interest_rate field.
   d. Click Complete.

Information

The Open Step Processor command in Process Administrator can be used to quickly complete a step when you are testing a workflow definition.

Alternatively, you can use the Complete Work command found on the Tasks menu to complete a step. However, because the Complete Work command does not open the step processor, you cannot enter data fields or perform other actions required in the step, except for setting step responses.

2. View work item status in Process Administrator.
   a. In Process Administrator, construct and execute a new queue search by using the data in the following table.

Search criteria	**Value**
Look for	Work Items
In	Work Queue
Select one	LoanProcessor
Search mode	Edit (all fields)

   b. In the results pane, notice that the work item is listed and the value of the interest_rate data field is the same value that you entered.
   c. Notice the column that indicates lock status. The lock status for your work item shows that the item is unlocked.
3. View the workflow history in Process Tracker management view.
   a. Select the row containing your work item in the results pane.
   b. Click Open Tracker on the results pane toolbar.
   c. In Process Tracker, click the Work Items tab.
   d. Notice the work item status and the participant field.
   e. Click the Workflow History tab and notice the list of steps completed and in progress.
   f. Click the Step tab in the Properties pane and explore its content.

      Tip: In the Steps tab Name field, select the step you want to view.
   g. Select Verify Information on the map and notice that the information in the Properties pane changes.
   h. Click File > Exit to close Process Tracker.
4. Complete work in Process Administrator.
   a. In Process Administrator, click Tasks > Complete Work.

b. In the Complete Work window, select the item assigned to the LoanProcessor queue in the top pane.

c. Click OK.

d. Notice that the results pane is refreshed and that the work item no longer appears.

The results pane is empty, indicating that all work items were completed and removed from the system.

5. View events from the completed workflow.

a. Construct and execute a filtered search of the event log by using the data in the following table.

Search criteria	Value
Look for	Events
In	Event Log
Select one	DefaultEventLog
Search mode	Not applicable
Criteria tab edit box	`F_Subject = 'Test Workflow'`

Hint

When entering search criteria in the Criteria tab, you can type the search expression directly into the Criteria tab edit box. Alternatively, you can build the search expression in the edit box using the list options and the Insert, AND, OR, and ( ) buttons.

b. Scroll through the results pane and view the various events that occurred during processing of Test Workflow.

c. Notice the values in the F_EventType column.

Information

An explanation of system event types can be found in the IBM FileNet P8 Information Center topic “Event logging categories.”

d. Close Process Administrator.

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