Lesson: Workflow submaps

Overview

Why is this lesson important to you?

You are designing an IBM FileNet BPM solution. You need an efficient way of organizing steps in a workflow definition. You want to define a set of post-processing steps, which is always executed immediately before workflow termination. You must test the workflow to verify the changes.

Activities

- Use workflow submaps: Challenge
- Use workflow submaps: Walkthrough

Requirements

The activities in this unit assume that you have access to the student system configured for these activities

Lesson dependency

You must have successfully completed the previous lesson 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

Note

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

Use workflow submaps: Challenge

Challenge

Modify your loan processing workflow definition and add submaps and other steps to the Workflow map to model the following business logic.

After the launch step, the loan is processed in three main phases performed in this order: Prepare Loan, Process Loan, and Complete Loan.

The Prepare Loan phase has two steps: Verify Information and Get Rate and Payment. The Process Loan phase has two steps: Review Loan (formerly named the Process Loan step) and Authorize Loan. The Complete Loan phase has the following steps: Complete Loan Package (formerly named the Complete Loan step), Assign Values, and Get Status. Immediately before workflow termination, the Set Loan Document Status step must always be executed.

Use the data in the table to complete this activity. As noted below, some steps are used as placeholders and the step properties are completed in a later lesson.
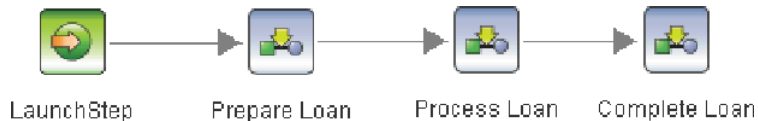
Data

Item	Value
Workflow definition file	Object store > LoanProcess > Workflow > Loan Processing Workflow - Infrastructure
Get Rate and Payment step properties	Name: `Get Rate and Payment` [Leave all other properties unassigned. The details of this step are completed in a later lesson.]
Review Loan step properties (formerly named Process Loan step)	Name: `Review Loan` [Leave all other properties the same as the Process Loan step.]
Authorize Loan step properties	Name: `Authorize Loan` [Leave all other properties unassigned. The details of this step are completed in a later lesson.]
Complete Loan Package step properties (formerly named Complete Loan step)	Name: `Complete Loan Package` [Leave all other properties the same as the Complete Loan step.]

Item	Value

Set Loan Document Status step properties	• Name: `Set Loan Document Status`
	• Activity Type: LoanUnderwriter work queue
	• Selected Parameters:
	    - loan_document [Read]
	    - status [Read]

Verification

- You must launch and process the workflow through to completion.
- Immediately before workflow termination, the Set Loan Document Status step must always be executed, regardless of the route taken to termination. The status field must have the value "Loan processing for customer_name is completed."
- Your final Workflow map must look similar to the following diagram. This diagram contains a LaunchStep and three submap steps.

LaunchStep   Prepare Loan   Process Loan   Complete Loan

Use workflow submaps: Walkthrough

Introduction

This exercise gives you practice in defining and using workflow submaps.

You continue building the loan processing application that you studied in previous lessons. The three main phases of this process are the following: Prepare Loan, Process Loan, and Complete Loan. In this activity, you define three submaps for these phases. You override the Terminate submap in order to add a step to be done before workflow termination.

Procedure 1: Create submaps

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. 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. Create three new maps.

    a. On the map toolbar, click Create Map.

    b. Under Map Type, select Create new map.

    c. Type `Prepare Loan Map` in the Name field.

    d. Click OK.

    e. Create two more new maps with the following names:

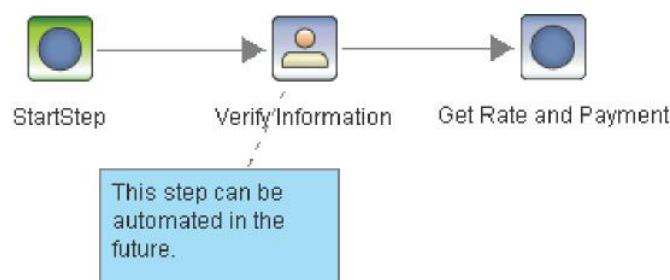   `Process Loan Map`

       `Complete Loan Map`

Procedure 2: Use submaps

1. Remove a step from the Workflow map and move to the Prepare Loan Map submap.

    a. Use the map toolbar to select the Workflow (Main Map) map.

    b. On the Workflow map, right-click the Verify Information step and click Cut.

    c. Use the map toolbar to select the Prepare Loan Map.

d. On Prepare Loan Map, right-click in the map area to the right of StartStep and click Paste.

e. Draw a route from StartStep to the Verify Information step.

f. Use the map toolbar to select the Workflow (Main Map) map.

g. Right click the blue annotation that was formerly associated with Verify Information and click Cut.

h. Use the map toolbar to select the Prepare Loan Map.

i. On Prepare Loan Map, right-click below the Verify Information step and click Paste.

j. Draw an association from the blue text annotation to the Verify Information step.

2. Add another step to Prepare Loan Map.

To save time in class, you create the Get Rate and Payment step as a placeholder in the workflow. The step properties are completed in a later lesson.

a. Add an Activity step to the right of the Verify Information step.

b. In the Properties pane, replace the default step name with the value `Get Rate and Payment`.

c. Draw a route from the Verify Information step to the Get Rate and Payment step.

d. Verify that your Prepare Loan Map looks similar to the following diagram. This diagram contains a StartStep followed by the Verify Information and Get Rate and Payment steps.

3. Click File > FileNet > FileNet Save to save an interim copy of your workflow definition to the FileNet object store.
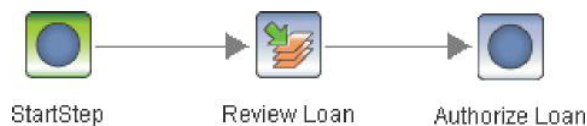
> **!** **Important**

When you are working on a large, complex, or time consuming workflow definition, you can use the Save, Save As, or FileNet Save command to save an interim copy of your work as back up in case of unexpected workstation failure.

The FileNet Save command saves changes temporarily to an existing file in the object store. You must use the FileNet Checkin command to permanently save your changes.

4. Copy a step from the Workflow map and move to the Process Loan Map submap.

    a. Use the map toolbar to select the Workflow map.

    b. On the Workflow map, right-click the Process Loan step and click Copy.

    c. Use the map toolbar to select the Process Loan Map submap.

    d. On Process Loan Map, right-click in the map area to the right of StartStep and click Paste.

    e. In the Properties pane, replace the Process Loan step name with the value `Review Loan`.

    f. Draw a route from StartStep to the Review Loan step.

5. Add another step to Process Loan Map.

To save time in class, you create the Authorize Loan step as a placeholder in the workflow. The step properties are completed in a later lesson.

    a. Add an Activity step to the right of the Review Loan step.

    b. In the Properties pane, replace the step name with the value `Authorize Loan`.

    c. Draw a route from the Review Loan step to the Authorize Loan step.

    d. Verify that your Process Loan Map looks similar to the following diagram. This diagram contains a StartStep followed by the Review Loan step and Authorize Loan steps.

StartStep   Review Loan   Authorize Loan

6. Remove steps from the Workflow map and move to the Complete Loan Map submap.

    a. Use the map toolbar to select the Workflow map.

b. On the Workflow map, select the Complete Loan, Assign Values, Get Status, and text annotation map elements.
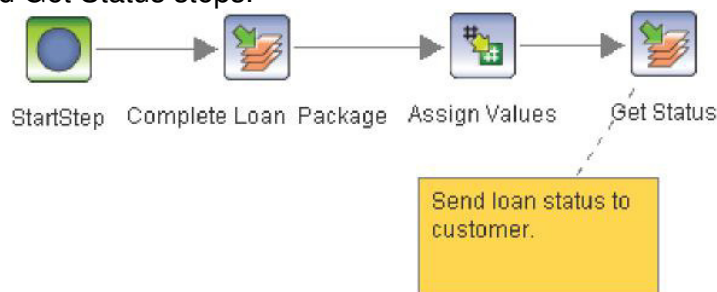
Leave the LaunchStep and Process Loan step unselected.

Tip: You make a selection of multiple elements by clicking and dragging the cursor around the map elements that you want to select.

c. After you have selected the map elements, right-click the selection and click Cut.

d. Use the map toolbar to select the Complete Loan Map submap.

e. On Complete Loan Map, right-click in the map area to the right of the Start Step and click Paste.

Notice that the annotation and its association did not copy. You must copy the association separately.

f. Use the map toolbar to select the Workflow submap.

g. Right-click the yellow text annotation and click Cut.

h. Use the map toolbar to select the Complete Loan Map submap.

i. Right-click the map area next to the Get Status step and click Paste.

j. Draw an association from the text annotation to the Get Status step.

k. Reposition the copied map elements, if necessary.

l. Draw a route from the StartStep to the Complete Loan step.

m. Select the Complete Loan step.

n. In the Properties pane, replace the Complete Loan step name with the value `Complete Loan Package`.

o. Verify that your Complete Loan Map looks similar to the following diagram. This diagram contains a StartStep followed by the Complete Loan Package, Assign Values, and Get Status steps.
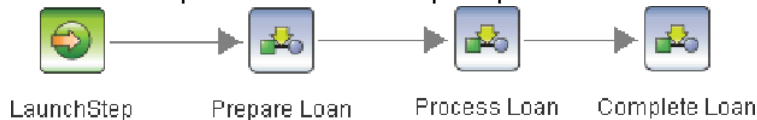

7. Change a step type to a submap step.

a. Use the map toolbar to select the Workflow map.

b. Right-click Process Loan, select Change step type, and click Submap Step.

    dc. In the General tab in the *Select a map for the Submap* field, select Process Loan
        Map from the list.

8. Add two more submap steps to the Workflow map.

    a. Drag a Submap step from the BPM Palette and place it between LaunchStep and
        Process Loan.

    b. In the General tab, replace the default step name with the value `Prepare Loan`.

    c. In the General tab, select Prepare Loan Map from the list.

    d. Drag a submap step from the BPM Palette and place it to the right of the Process
        Loan submap step.

    e. In the General tab, replace the default step name with the value `Complete Loan`.

    f. In the General tab, select Complete Loan Map from the list.

9. Draw routes as necessary so that steps are processed in the following order:
   LaunchStep, Prepare Loan, Process Loan and Complete Loan.

      Verify that your Workflow map looks similar to the following diagram. This diagram
      contains the LaunchStep and three submap steps.

Procedure 3: Override the Terminate map

1. Override Terminate.

    a. On the map toolbar, click Create Map.

    b. Select Override Inherited Map.

    c. Select the Terminate map.

    d. Click OK.

2. Add a step to the Terminate map.

    a. Add an Activity step to the Terminate map and place it to the right of StartStep.

    b. Draw a route from StartStep to the new Activity step.

    c. Use the following information to assign the step properties for the new step.

        •   Step Name: `Set Loan Document Status`
        •   Activity Type: LoanUnderwriter Work Queue
        •   Selected Parameters:
          - loan_document [Read]
          - status [Read]

Procedure 4: Test the workflow definition

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, click Data Fields to display the data fields.

   b. In the Data Fields view, type the following values in the fields:

      *   customer_name: `Joe Adams`
      *   loan_amount: `2500`.

   c. 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 '%Joe Adams%'`

   c. Verify that your work item appears in the results pane and is in the Inbox(0) queue assigned to olivia.

4. Complete the Verify Information step from the Prepare Loan submap.

   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.

5. Complete the Review Loan step from the Process Loan submap.

   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 Package step from the Complete Loan submap.

   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. Complete the Get Status step from the Complete Loan submap.

   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 LoanCustomer queue.

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

   d. Verify that the status field contains the following text: `"Loan processing for Joe Adams is completed."`

   e. Click Complete.

8. Complete the Set Loan Document Status step from the Terminate submap.

   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. Verify that the status field contains the following text: `"Loan processing for Joe Adams is completed."`

   e. Click Complete.

   f. In Process Administrator, click Find Now to reexecute the roster search.

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

   The workflow has terminated and the work item removed from the system. If you want, search the LoanLog event log for the work item log entries.

9. Exit all applications.

   a. Close Process Administrator.

b. Switch to Process Designer.

c. Exit Process Designer and check in your final version of the workflow.

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