

Lesson: Workflow inheritance

Overview

Why is this lesson important to you?

You are designing an IBM FileNet BPM solution. You want to take advantage of process reusability and use inheritance in a workflow definition. You must learn to create a workflow hierarchy and override an inherited map. You must test the workflow to verify the changes.

Activities

- Use workflow inheritance: Challenge
- Use workflow inheritance: 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.

ead**User accounts**

Type	User ID	Password
FileNet Workplace XT	filenetadmin	IBMFileNetP8

**Note**

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

Use workflow inheritance: Challenge

Challenge

Transfer a prepared base loan processing workflow definition file. Create a new commercial loan processing workflow definition that is derived from the base loan processing workflow.

Define Workflow Properties in the commercial loan processing workflow. Activate the inherited Workflow main map and modify its Launch step. Override the Process Loan Map submap and modify the Approve Loan Amount and Review Loan steps.

Use the data in the table to complete this activity.

Data

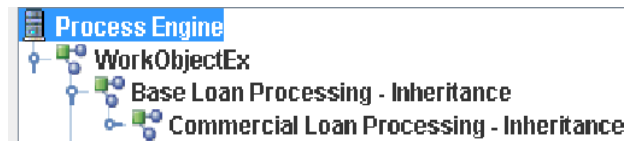
Item	Value
Base loan processing workflow definition file	C:\Labs\F145\Infrastructure\ Base Loan Processing - Inheritance.pep
Derived workflow definition file	Object store > LoanProcess > Workflow > Commercial Loan Processing - Inheritance
Workflow Properties	<ul style="list-style-type: none"> Workflow <ul style="list-style-type: none"> Name: Commercial Loan Processing - Inheritance Workflow <ul style="list-style-type: none"> Subject: Commercial Loan Processing Roster: <ul style="list-style-type: none"> LoanRoster Event Log: <ul style="list-style-type: none"> LoanLog Data fields: <ul style="list-style-type: none"> - business_name, String - MAX_AMOUNT, String, 999000. Attachment: <ul style="list-style-type: none"> -business_plan
Override Workflow Properties	Data field: <ul style="list-style-type: none"> Initial value of MAX_AMOUNT: 999000.
LaunchStep properties	Add to Selected Parameters: <ul style="list-style-type: none"> business_name [Read/Write] business_plan [Read/Write]

Approve Loan Amount step properties	Add to Selected Parameters: <ul style="list-style-type: none">• business_name [Read]• business_plan [Read]
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Item	Value
Review Loan step properties	Add to Selected Parameters: <ul style="list-style-type: none">business_name [Read]

Verification

- You must launch and process the derived workflow through to completion.
- At run time, the Approve Loan Amount and Review Loan steps must include the business_name and business_plan parameters.
- After transferring all workflows, your workflow hierarchy must look similar to the following diagram. This diagram shows that Commercial Loan Processing is inherited from Base Loan Processing.



ead Use workflow inheritance: Walkthrough

Introduction

This exercise gives you practice in creating and using workflow inheritance in a workflow definition file.

Procedure 1: Create a workflow hierarchy

You use the same loan processing example that you studied in the previous lesson. For your convenience and in case you did not successfully complete the previous activity, this workflow was renamed and saved to the student system as the Base Loan Processing workflow. You create a derived Commercial Loan workflow, which inherits from the Base Loan Processing workflow. The Commercial Loan workflow overrides the Process Loan Map submap in order to adapt it for processing larger loan amounts and reviewing commercial business plans.

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 and transfer a base workflow definition.

For your convenience, the Loan Processing - Routing workflow solution file, which you created in the previous lesson activity, has been saved in a new file for you. The file name and Workflow Name property were reset to Base Loan Processing - Inheritance.

- a. In Workplace XT, click Tools > Advanced Tools > Process Designer.
- b. Click File > Open.
- c. Locate and open the following file:

<C:\Labs\F145\Infrastructure\Base> Loan Processing - Inheritance.pep.

- d. Explore the workflow definition to familiarize yourself with the process flow and notice the following items:
 - This workflow is the same one that you worked with in the previous lesson called Loan Processing Workflow - Routing.
 - The Workflow main map contains two submap steps, which call the Prepare Loan Map and Process Loan Map submaps.
 - The workflow name was changed to Base Loan Processing - Inheritance.
- e. Click File > Transfer Workflow Collection.
- f. Complete the "Save the workflow definition to an object store" wizard using the following information:
 - Object store: LoanProcess > Workflows
 - Document Title: Base Loan Processing - Inheritance
 - Security: <Accept default values.>
- g. Close the file and cancel the checkout.

3. Create a new workflow definition that is derived from the Base Loan Processing workflow.
 - a. Click File > New.
 - b. In the Workflow Properties General tab, click the Modify icon located next to Base Workflow.
 - c. Select Base Loan Processing - Inheritance from the list.
 - d. Click OK.
 - e. Click the Maps tab under Workflow Properties.

Notice that Prepare Loan Map and Process Loan Map are included in the list of maps and the Inherited symbol that appears next to these map names.

- f. On the map toolbar, click the arrow to display the list of maps.

Notice that Prepare Loan Map and Process Loan Map are labeled Read Only.

4. Assign Workflow Properties.

- a. In the Workflow Properties General tab, define the following properties:
 - Workflow Name: Commercial Loan Processing - Inheritance
 - Workflow Subject: Commercial Loan Processing
- b. In the Data Fields tab, add a data field as shown in the following table.

Data Field Name	Type	Expression
business_name	String	""

- c. Override the MAX_AMOUNT data field by replacing the Expression with the following value: 999000.0

Notice the Overridden symbol that appears next to MAX_AMOUNT.

- d. In the Attachments tab, define the following attachment: business plan

Procedure 2: Override an inherited map

1. Override the inherited Process Loan Map.
 - a. On the map toolbar, click Create Map.
 - b. Select Override Inherited Map.
 - c. Select Process Loan Map.
 - d. Click OK.
 - e. Notice that the Process Loan map is displayed and is no longer labeled Read Only in the list of maps.

2. Make changes to the overridden Process Loan Map.

a. Add the following additional Selected Parameters to the Approve Loan Amount step:

- business_name [Read]
- business_plan [Read]

b. Add the following additional Selected Parameters to the Review Loan step:

- business_name [Read]
- business_plan [Read]

Procedure 3: Reactivate and modify the Workflow map

1. Reactivate the Workflow main map from the base workflow.

- On the map toolbar, select the Workflow map.
- On the map toolbar, click Delete current map.
- Click Yes in the message window.

Notice that the Workflow map from the base workflow is reactivated and is labeled Read Only in the Maps list.

- On the map toolbar, click Create Map.
- Select Override Inherited Map.
- Select the Workflow map.
- Click OK.

Notice that the Workflow map is no longer labeled Read Only.

2. Modify the Workflow map.

- Select the Launch Step on the Workflow map.
- Add the following additional Selected Parameters to the LaunchStep:

- business_name [Read/Write]
- business_plan [Read/Write]

Procedure 4: Launch and test an inherited workflow

1. Launch the derived workflow.

- Validate the workflow and correct validation errors, if any.
- Click File > Launch Main Workflow.
- Complete the “Save the workflow definition to an object store” wizard using the following information:

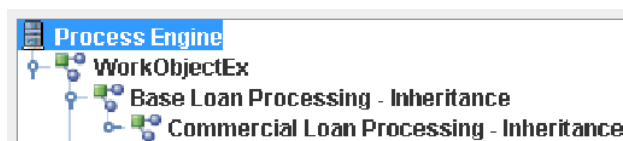
- Object store: LoanProcess > Workflows
- Document Title: Commercial Loan Processing – Inheritance
- Security: <Accept default values.>

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:
 - business_name: General Company
 - customer_name: Joe Cooper
 - loan_amount: 750000.
 - loan term: 30
- c. In the Attachments view, verify that loan_document and business_plan attachment links are displayed.
- d. If you want, assign loan_document and business_plan attachments of your choice.
Tip: You can find sample documents in the LoanProcess > Loans folder on the object store.
- e. Click Launch.

3. View the workflow hierarchy in Process Designer.

- a. In the Workflow Properties General tab, click the Modify icon located next to Base Workflow.
- b. In the left pane, expand the Base Loan Processing - Inheritance node, if necessary.
- c. Verify that the workflow hierarchy looks similar to the following diagram. This diagram shows Commercial Loan Processing is inherited from Base Loan Processing.



- d. Click Cancel to close the Select Base Workflow window.

4. 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 'Commercial%'

- c. Verify that your work item appears in the results pane and is in the Inbox(0) queue assigned to olivia.
5. Complete the Verify Information step with the "Valid information" response.
 - 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 Responses field of the Verify Information step processor window, select "Valid information."
 - d. Click Complete.
6. Complete the Get Rate and Payment step from the Prepare Loan Map 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 LoanOfficer queue.
 - c. Click Open Step Processor on the results pane toolbar.
 - d. In the Get Rate and Payment step processor window, type values of your choice in the interest_rate and monthly_payment fields.
 - e. In the status field, type the following text value:
`Loan preparation is completed.`
 - f. Click Complete.
7. Complete the Review Loan step from the Process Loan Map submap.

Because the MAX_AMOUNT value is set to 999000., the work item took the "Not over limit" route and the next step is Review Loan.

 - 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. Verify that the business_name and business_plan parameters are listed.
 - e. Click Complete.
8. Complete the Authorize Loan step from the Process Loan Map 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 LoanManager queue.
 - c. Click Open Step Processor on the results pane toolbar.
 - d. Click Complete.

9. 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 preparation 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.

10. Use the skills that you have learned to launch the workflow again and test other responses and processing routes.

Use Process Administrator and Process Tracker to help you follow the process flow, if needed.

11. Exit all applications.
 - a. Close Process Administrator.
 - b. In Process Designer, if you have not already done so, check in your final version of the workflow definition.
 - c. Exit Process Designer.
 - d. Log out of Workplace XT and close the browser.