

**OPEN AN
ACCOUNT**

IBM BPM **CASE STUDY**

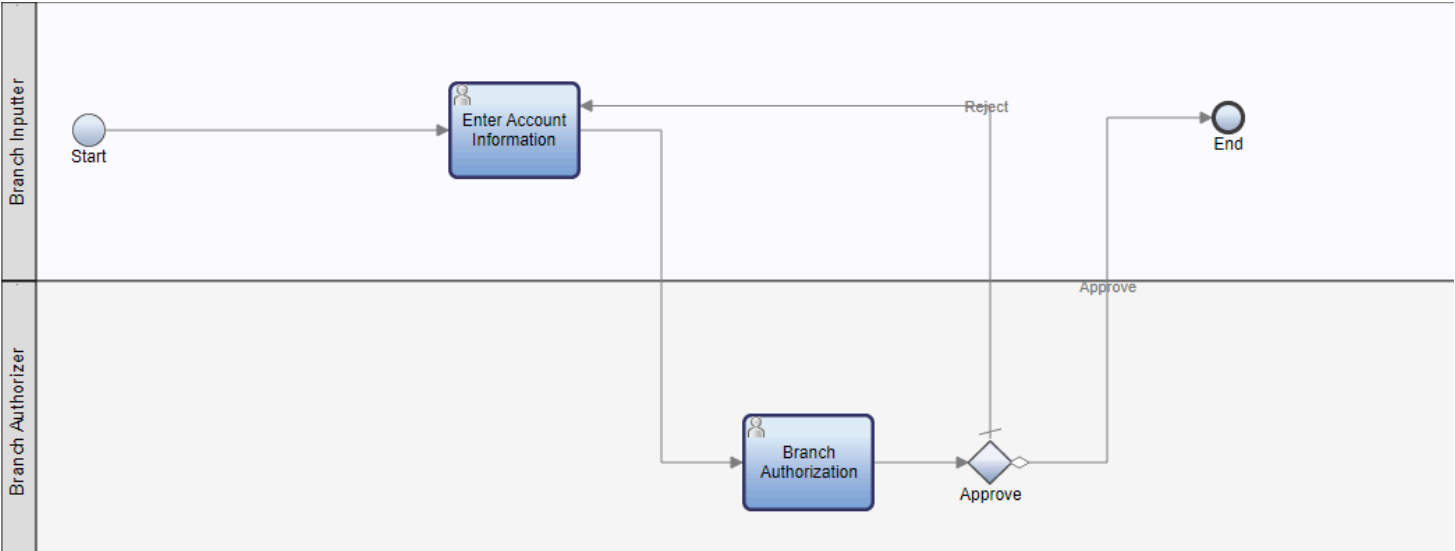
Prepared By : Yasmine Ali Mohammed

The **Goal** of this exercise is to automate Account Opening Process having the following three main activities :

- 1- Create Account Opening Request which is performed by Branch Inputter.
- 2- Enter Account Information which is performed by Branch Inputter.
- 3- Authorize Account Information which is performed by Branch Authorizer.

1- Create the business process named **Account Opening Process**:

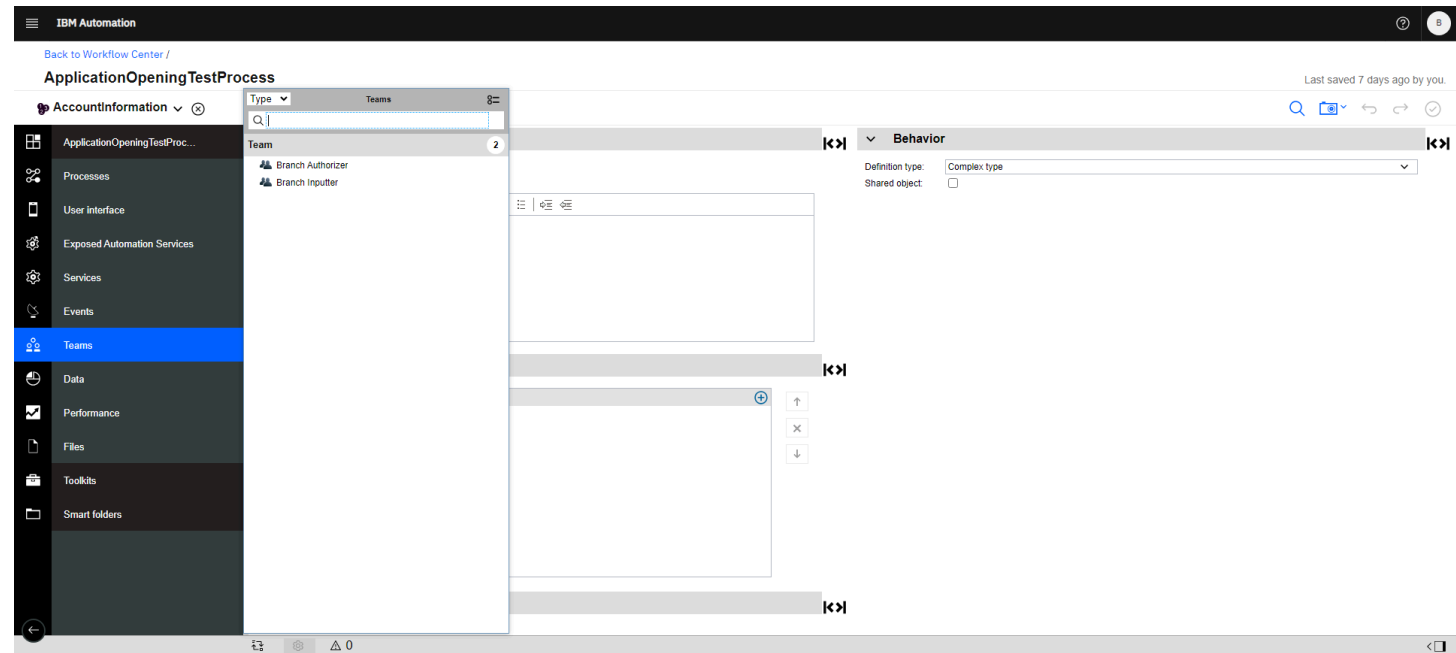
Create it then open the Overview Tab to get the visualization of the diagram as follows.



2- Create the Teams and Groups:

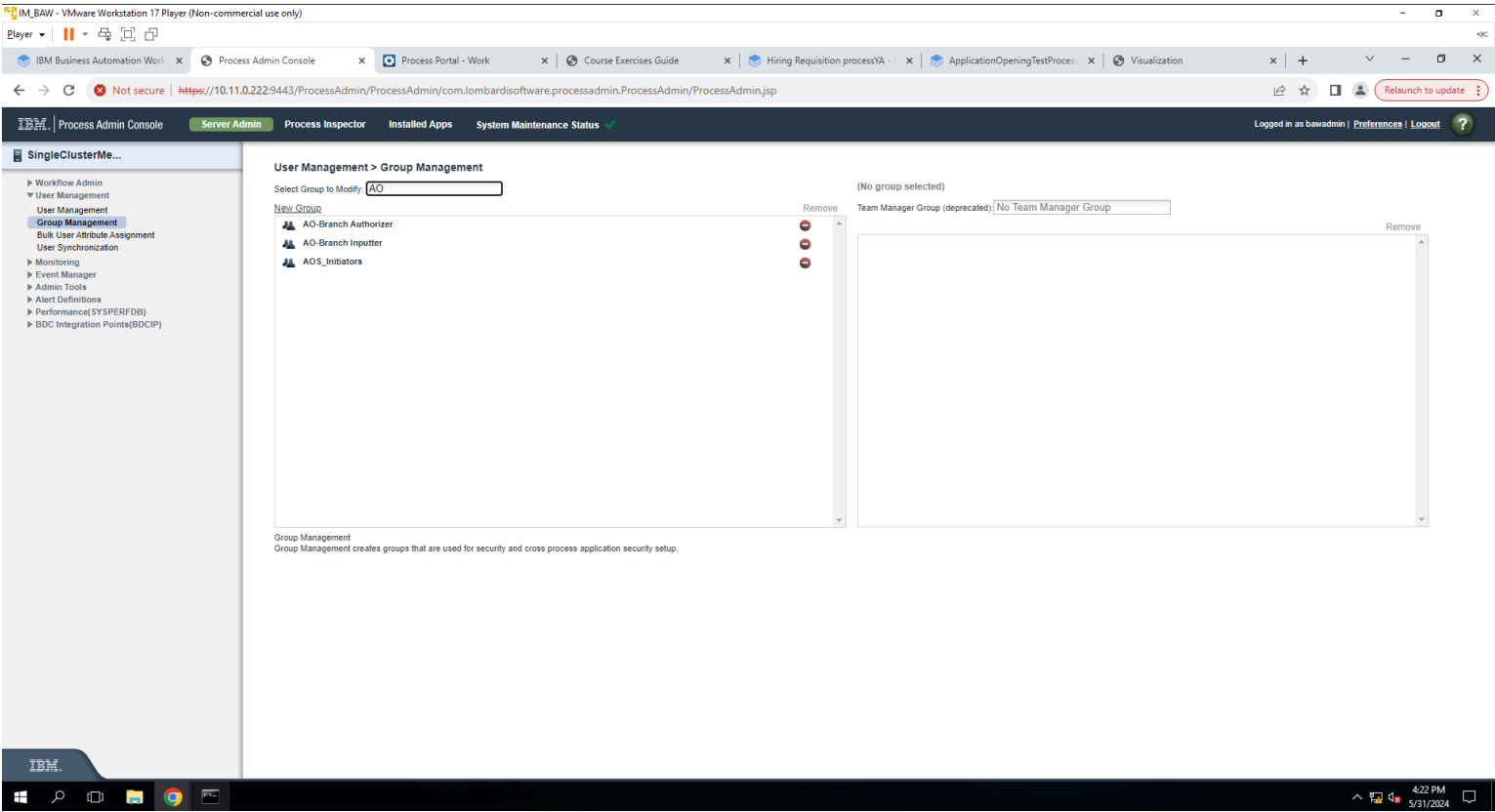
- Create Teams in Web Designer (**Branch Authorizer & Branch Inputter**).
- Groups (**Branch Authorizer & Branch Inputter**) and Users (**AOAuthorizer1, AOAuthorizer2, AOInputter1, AOInputter1**) created using Admin Console.
- Groups Added within teams using Web Designer.

1) In the Web Designer Add new 2 teams from Teams artifact as follows: (**Branch Authorizer & Branch Inputter**).

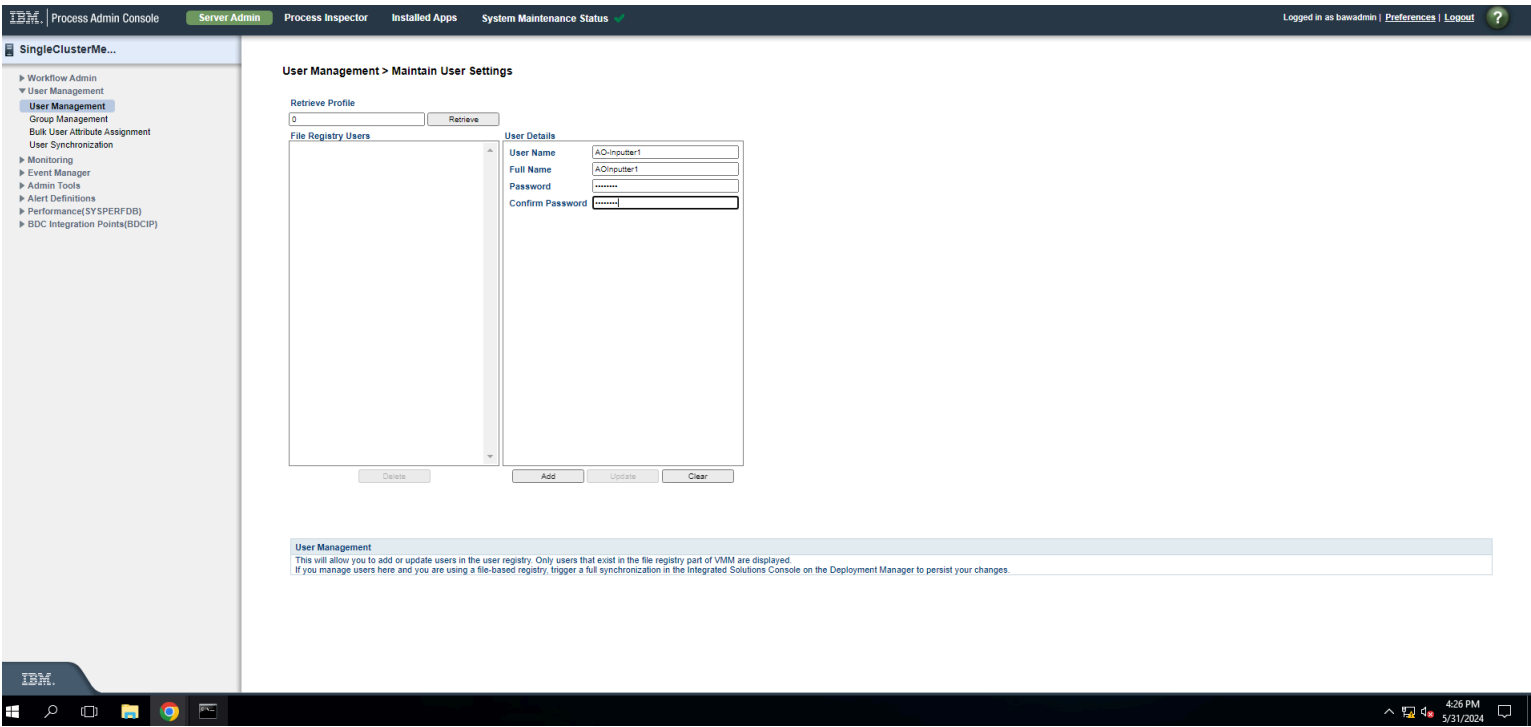


2) In the Admin Console

- Add Groups as follows: **(AO-Branch Authorizer & AO-Branch Inputter).**

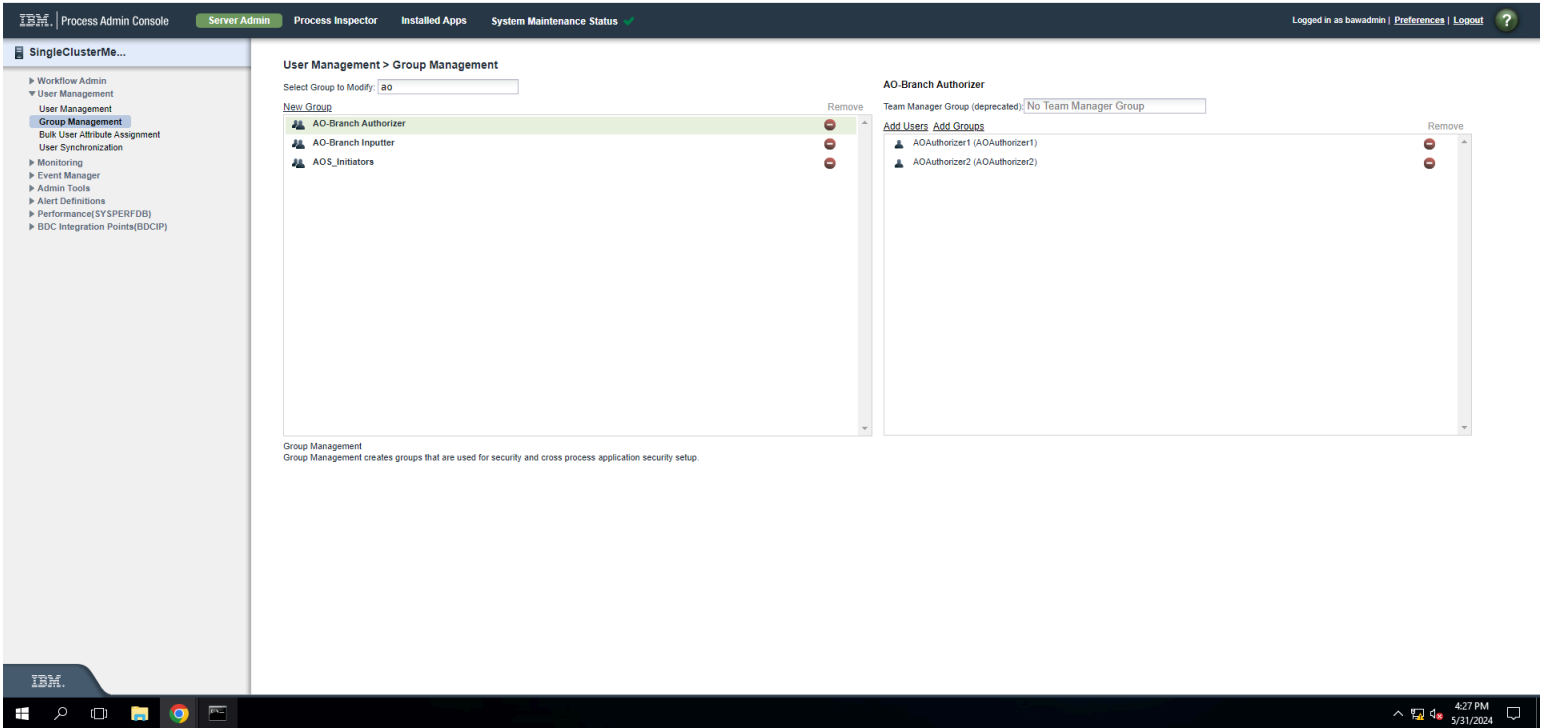


- Add Users as follows: **(AOAuthorizer1 , AOAuthorizer2 & AOInputter1, AOInputter2).**

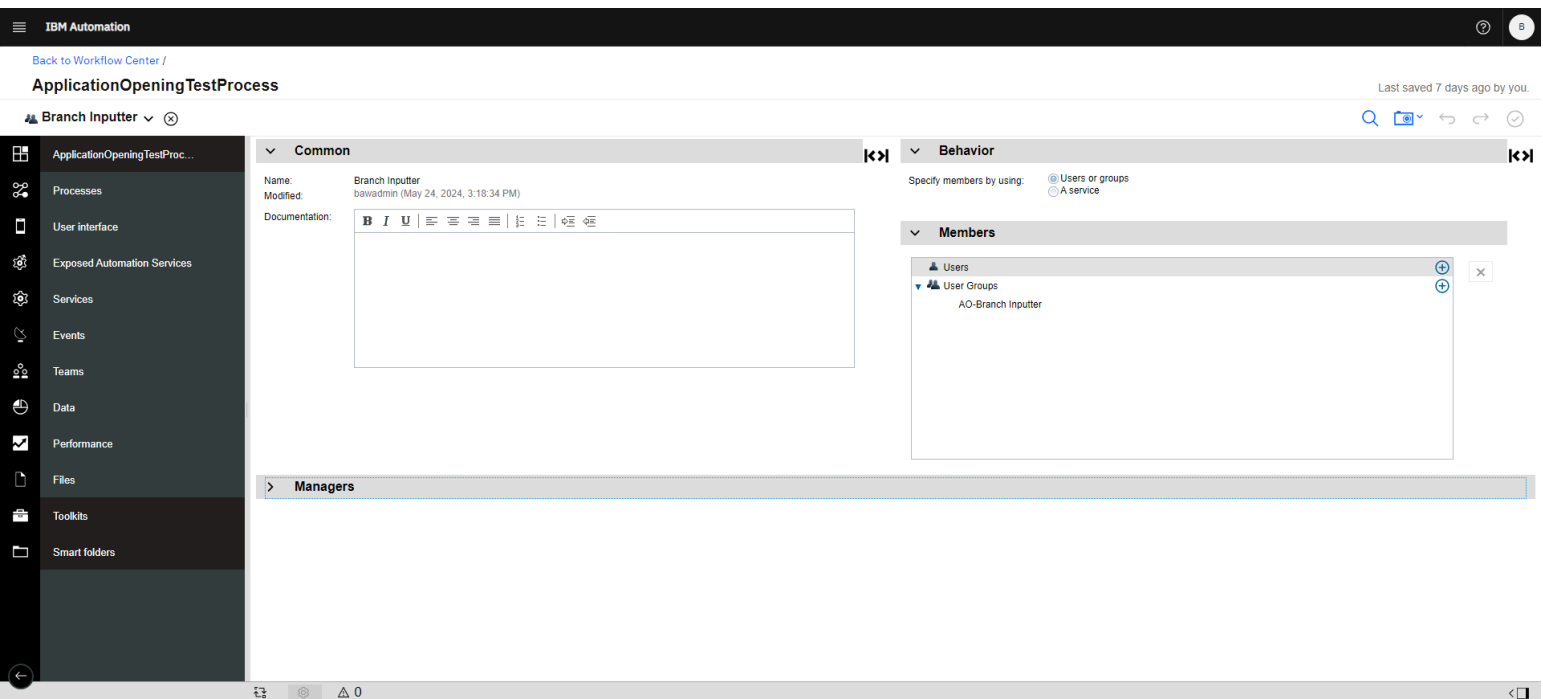


- After Adding those users go to the Group Management to add the users to the two groups **(AO-Branch Authorizer & AO-Branch Inputter).**

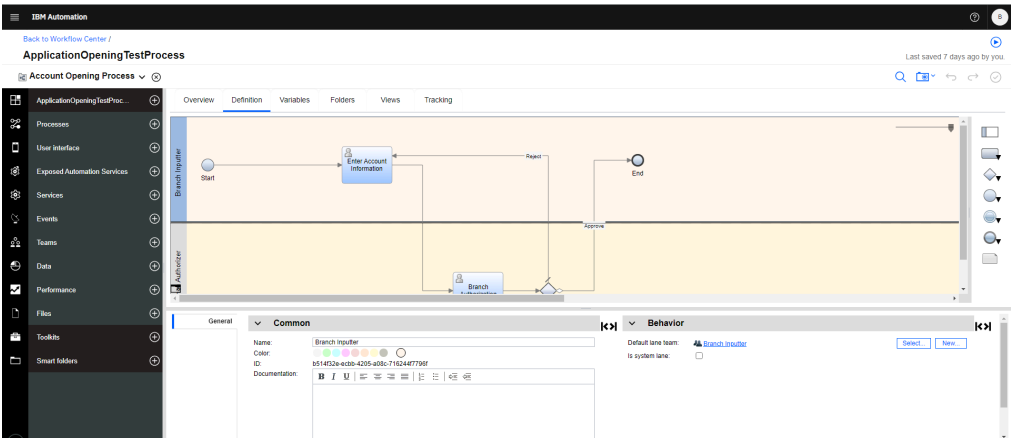
- The users assigned to the groups as declared:



- Going Back to the web designer to assign the groups in each team:



- Assign every lane to the team.
- Doing the same to the Branch Authorization Lane.



3- Create Business Objects:

1. CustomerInformation.

IBM Automation

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ApplicationOpeningTestProcess

Last saved 7 days ago by you.

CustomerInformation

ApplicationOpeningTestProc...

Processes

User interface

Exposed Automation Services

Services

Events

Teams

Data

Performance

Files

Toolkits

Smart folders

Common

Name: CustomerInformation

Modified: bawadmin (May 24, 2024, 4:06:19 PM)

Documentation:

Behavior

Definition type: Complex type

Shared object:

Parameters

Parameters

- customerName (String)
- customerCNIC (String)
- customerType (NameValuePair)
- dateOfBirth (Date)

Advanced Properties

2. AccountInformation.

IBM Automation

[Back to Workflow Center /](#)

ApplicationOpeningTestProcess

Last saved 7 days ago by you.

AccountInformation

ApplicationOpeningTestProc...

Processes

User interface

Exposed Automation Services

Services

Events

Teams

Data

Performance

Files

Toolkits

Smart folders

Common

Name: AccountInformation

Modified: bawadmin (May 24, 2024, 3:41:09 PM)

Documentation:

Behavior

Definition type: Complex type

Shared object:

Parameters

Parameters

- accountType (NameValuePair)
- accountTitle (String)
- accountCurrency (NameValuePair)

Advanced Properties

3. AccountOpeningRequest.

IBM Automation

[Back to Workflow Center /](#)

ApplicationOpeningTestProcess

Last saved 7 days ago by you.

AccountOpeningRequest

ApplicationOpeningTestProc...

Processes

User interface

Exposed Automation Services

Services

Events

Teams

Data

Performance

Files

Toolkits

Smart folders

Common

Name: AccountOpeningRequest

Modified: bawadmin (May 24, 2024, 3:39:45 PM)

Documentation:

Behavior

Definition type: Complex type

Shared object:

Parameters

Parameters

- customerInformation (CustomerInformation)
 - customerName (String)
 - customerCNIC (String)
 - customerType (NameValuePair)
 - dateOfBirth (Date)
- accountInformation (AccountInformation) (List)
 - accountType (NameValuePair)
 - accountTitle (String)
 - accountCurrency (NameValuePair)
- decision (String)

Advanced Properties

In **Application Opening Process** assign in the variables tab the business object [accountOpeningRequest(accountOpeningRequest)].

IBM Automation

Back to Workflow Center /

ApplicationOpeningTestProcess

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Account Opening Process

Overview Definition Variables Folders Views Tracking

Variables

Type to filter

Input

- accountOpeningRequest (AccountOpeningRequest)
- customerInformation (CustomerInformation)
- accountInformation (AccountInformation) (List)
- decision (String)

Output

- Private
- Exposed Process Variables

Exposed data

Variables, fields, or properties that can be viewed in end-user work environments.

Name	Alias
------	-------

In **Application Opening Process** in the Diagram tab select the exclusive gateway and implement it as follows.

IBM Automation

Back to Workflow Center /

ApplicationOpeningTestProcess

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Account Opening Process

Overview Definition Variables Folders Views Tracking

Start

Enter Account Information

Branch Authorizer

Approve

End

General

Decision

Pre & Post

Tracking

Documentation

Gateway

Name: Approve

Type: Exclusive Gateway

Decisions

Approve: tw.local.accountOpeningRequest decision=="Approve"

Default flow: Reject

3- Create Task Data Transfer Objects:

- Contains other fields required for manipulation at task level.

IBM Automation

Back to Workflow Center /

ApplicationOpeningTestProcess

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Account Opening Process

Overview Definition Variables Folders Views Tracking

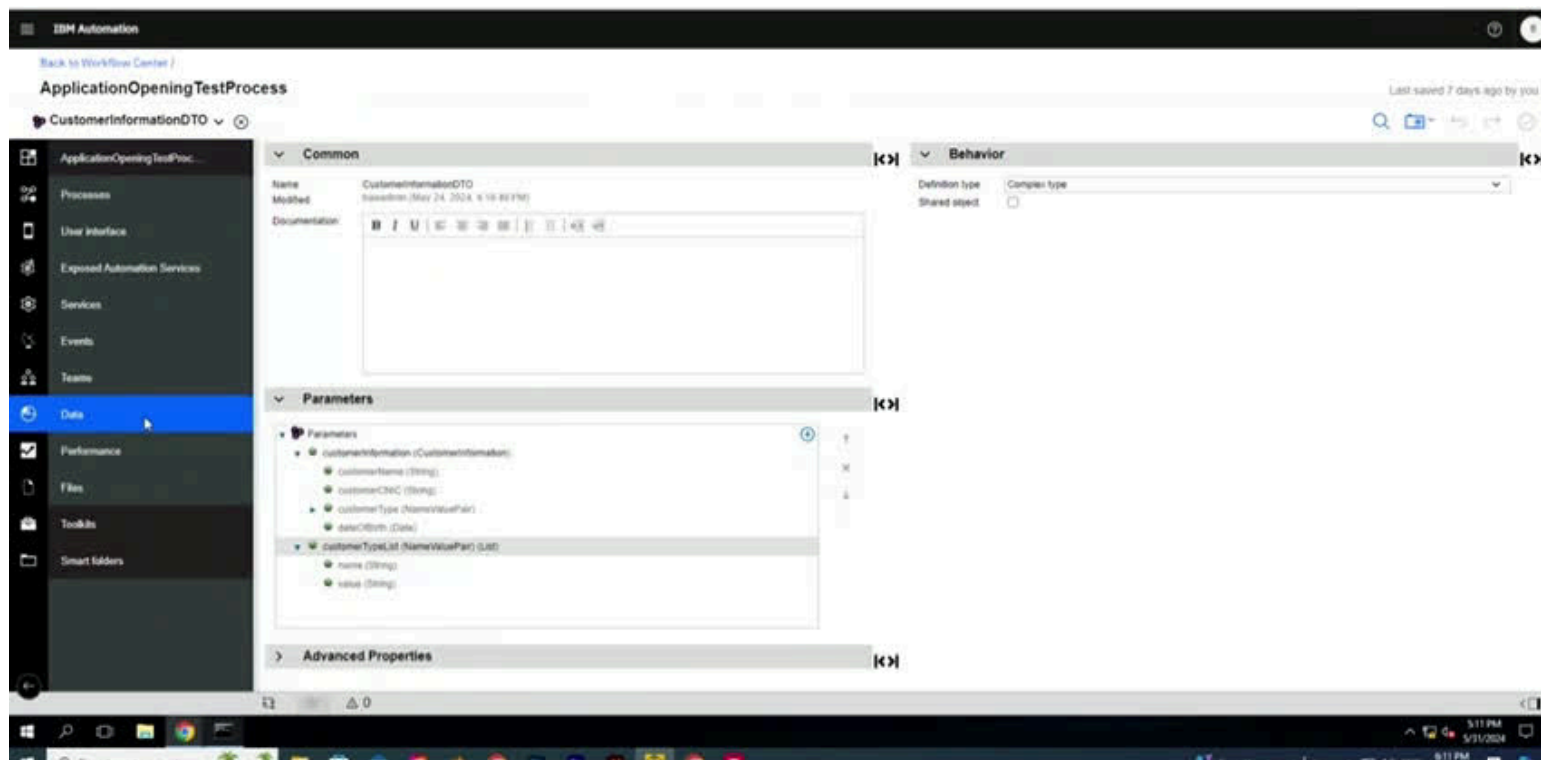
Data

Type

Business Object

- AccountInformation
- AccountInformationDTO
- AccountOpeningRequest
- BranchAuthorizationDTO
- CreateAccountOpeningRequestDTO
- CustomerInformation
- CustomerInformationDTO
- DecisionDTO
- EnterAccountInformationDTO

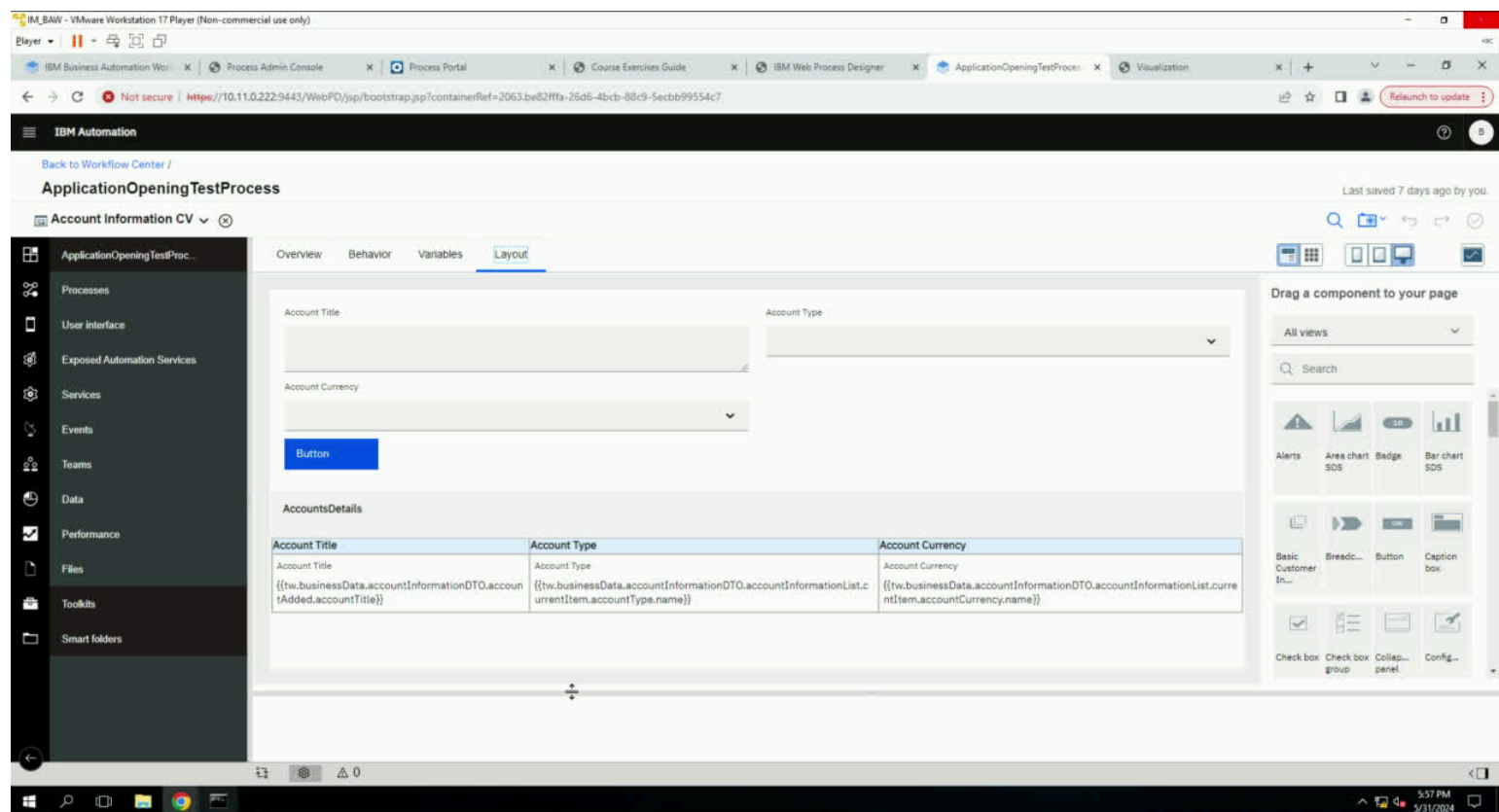
- All the data needed in this part clarified in this video.



To access the video:(video2)
https://drive.google.com/drive/folders/1-uNHINyzSz8FK3Mpqi4brk_4E-gS3laZ

4- Create Views:

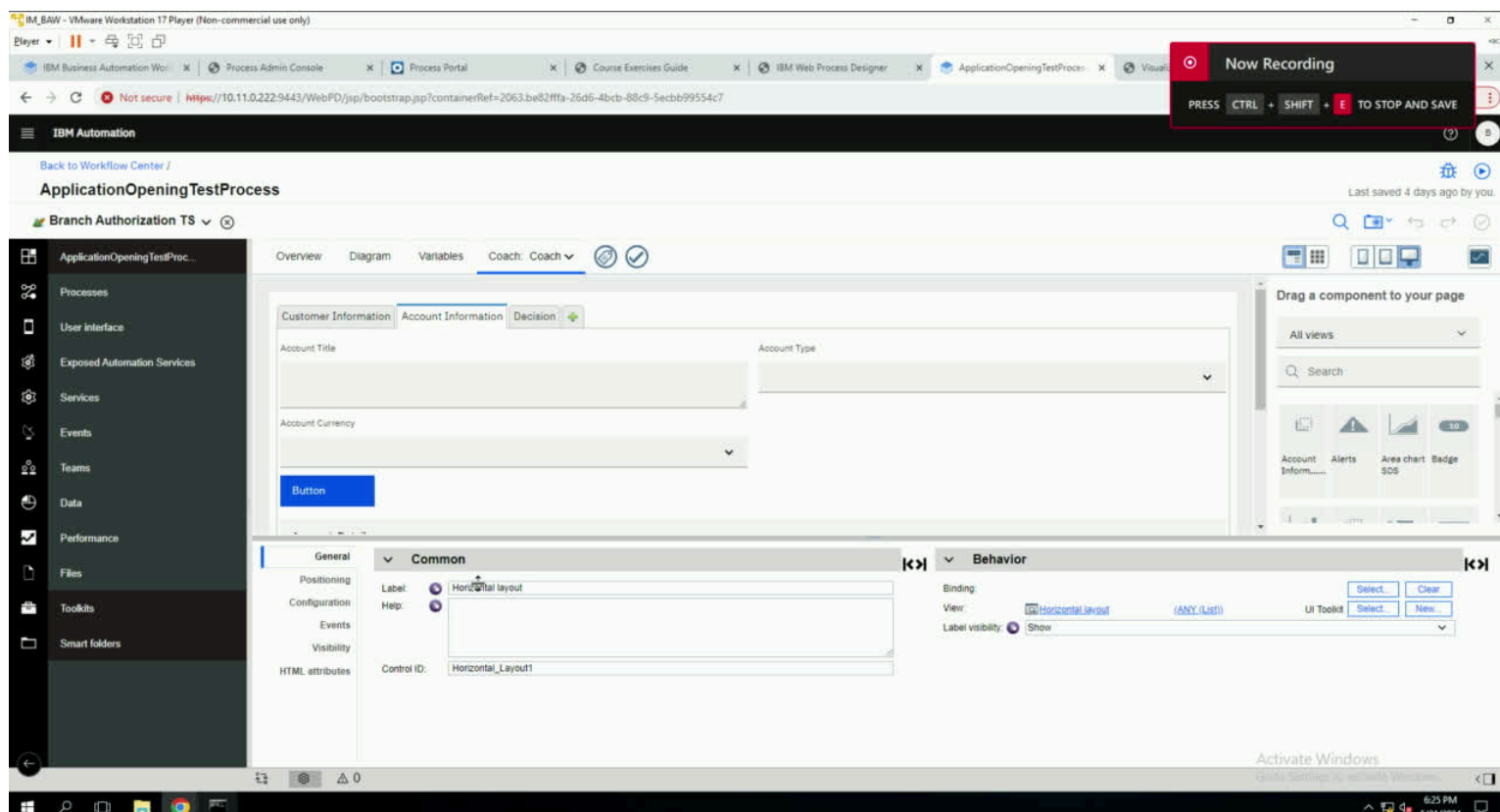
1. Basic Customer Information CV.
2. Customer Information Detailed CV.
3. Account Information CV.
4. Decision CV.



To access the video:(video3)
https://drive.google.com/drive/folders/1-uNHINyzSz8FK3Mpqi4brk_4E-gS3laZ

5- Create Coaches or Client-Side Human Service CSHS:

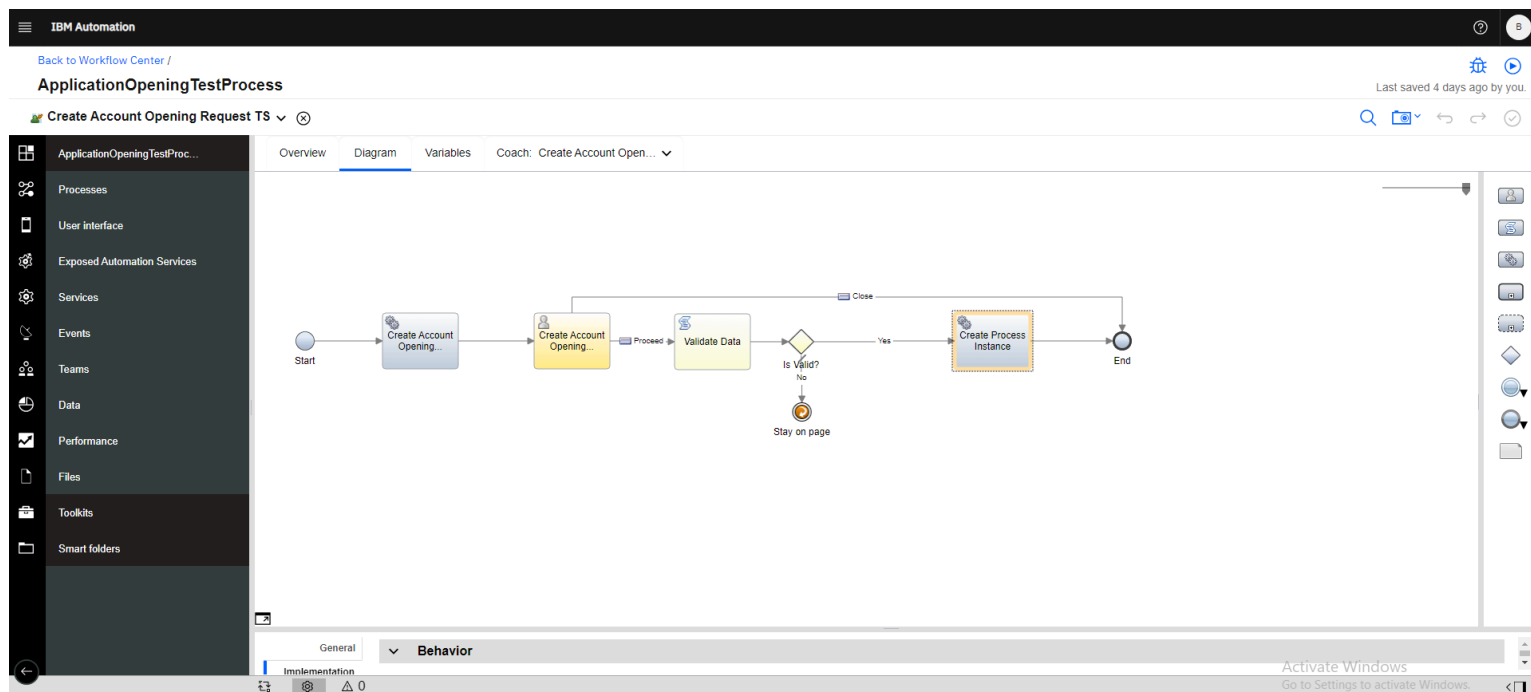
- Branch Authorization TS. contains the followed views:
 - Customer Information Detailed CV.
 - Decision CV.
 - Account Information CV.
- Create Account Opening Request TS.
 - Basic Customer Information CV.
- Enter Account Information .
 - Account Information CV.
 - Customer Information Detailed CV.



To access the video:(video1)

https://drive.google.com/drive/folders/1-uNHINyzSz8FK3Mpqj4brk_4E-gS3laZ

From The Diagram Tab in Create Account Opening Request TS Coach 2 services and 1 script to validate data .



6- Create Services:

- Create Account Opening Request Load WS

The screenshot displays the IBM Automation Workflow Center interface. The process name is 'ApplicationOpeningTestProcess'. The current view is the 'Diagram' tab, showing a simple flow from 'Start' to 'Init DTO' to 'End'. The 'Script' tab is also visible, containing the following code:

```
1 tw.local.createAccountOpeningRequestDTO = new tw.object.CreateAccountOpeningRequestDTO();
2 tw.local.createAccountOpeningRequestDTO.customerInformation = tw.object.CustomerInformation();
```

The left sidebar shows various navigation options like Processes, User Interface, Exposed Automation Services, Services, Events, Teams, Data, Performance, Files, Toolkits, and Smart folders. The bottom status bar indicates the system time as 7:10 PM on 5/31/2024.

- Create Process Instance

The screenshot displays the IBM Automation Workflow Center interface for the 'Create Process Instance US' process. The 'Diagram' tab shows a flow from 'Start' to 'Create Process Instance' to 'End'. The 'Script' tab contains the following code:

```
1 tw.local.accountOpeningRequest=new tw.object.AccountOpeningRequest();
2 tw.local.accountOpeningRequest.customerInformation=tw.local.createAccountOpeningRequestDTO.customerInformation;
3
4 tw.local.map = new tw.object.Map();
5 tw.local.map.put("accountOpeningRequest", tw.local.accountOpeningRequest);
6
7 tw.system.startProcessByName("Account Opening Process", tw.local.map);
8
```

The interface includes the same sidebar and status bar as the previous screenshot, with the system time at 7:10 PM on 5/31/2024.

6- Validation:

The screenshot displays the IBM Automation Workflow Center interface for a validation process. The 'Diagram' tab shows a flow starting with 'Start', followed by 'Create Account Opening...', then 'Validate Data', a decision diamond 'Is Valid?', and finally 'Create Process Instance' leading to 'End'. A 'Close' path is also shown from the 'Validate Data' step back to the 'Create Account Opening...' step. The 'Script' tab contains the following code:

```
1 if(tw.local.createAccountOpeningRequestDTO.customerInformation.customerName == null || tw.local.createAccountOpeningRequestDTO.customerInformation.customerName == ""){
2   //tw.system.coachValidation.addValidationError("tw.local.createAccountOpeningRequestDTO.customerInformation.customerName", "Please Enter Customer Name")
3   tw.system.coachValidation.addValidationError("tw.local.createAccountOpeningRequestDTO.customerInformation.customerName", "Please Enter Customer Name")
4 }
5
6 if(tw.local.createAccountOpeningRequestDTO.customerInformation.customerCHIC == null || tw.local.createAccountOpeningRequestDTO.customerInformation.customerCHIC == ""){
7   tw.system.coachValidation.addValidationError("tw.local.createAccountOpeningRequestDTO.customerInformation.customerCHIC", "Please Enter Customer CHIC")
8 }
```

The interface includes the same sidebar and status bar as the previous screenshots, with the system time at 7:11 PM on 5/31/2024.