In this lab you will create new forms for the Loan Application process.

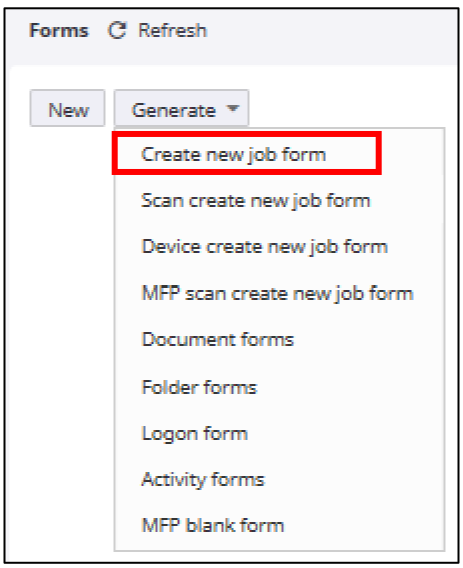
Lab 12-1

Build Forms

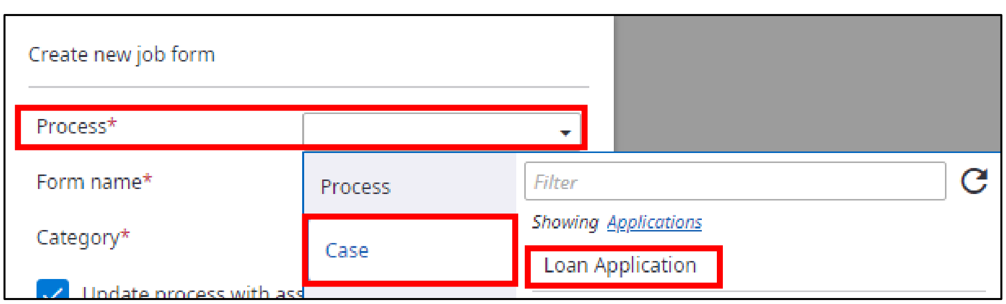
Build a Create New Job Form

In this part, you will build a create new job form. The Create New Job form allows you to create an instance of a process. If you are building forms for a process, you should close the process if it is open in the Designer. During form build, TotalAgility will update the Job creation form process property with the create new job form name. The Associated file path property for any manual activity will also be updated with the name of the form that is built.

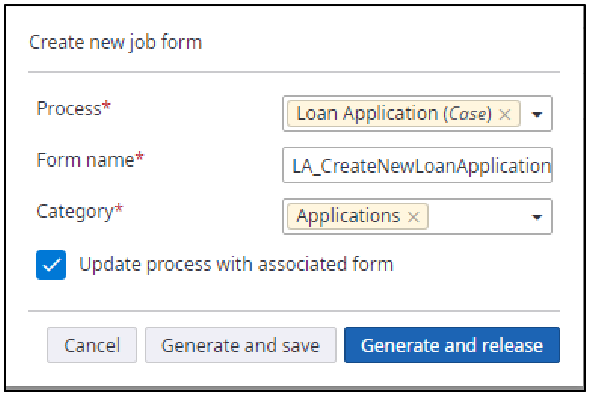
1. From the **Main** menu navigate to **User interface > Forms**.
2. From the **Generate** dropdown, select **Create new job form**.



3. From the **Process** dropdown, select the **Case** tab, and select **Loan Application**.



4. Set the **Form name** to **LA_CreateNewLoanApplication**.



5. Leave the other options as default.

6. Click **Generate and release** (leave the Forms list page open for the next part).

Create Activity Forms

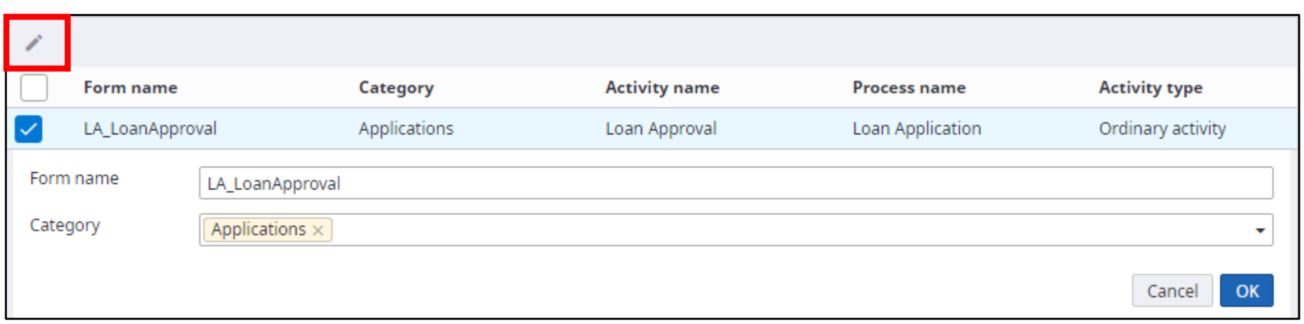
In this part, you will create forms for all the manual (ordinary) activities in the Loan Application process. An activity form is displayed when a user takes an activity from their work queue. The form is linked to the activity using the Associated file path property of the activity.

7. From the **Generate** dropdown, select **Activity forms**.

8. From the **Process** dropdown, select the **Case** tab, and select **Loan Application**.

9. Uncheck **Loan ApplicationGenerate Confirmation Letter** and **Loan ApplicationEmail Forms**.
   Note: You will not build forms for these activities as they will both be automated in the next lab.

10. Select the **Loan ApplicationLoan Approval** form (do not click the checkbox) and click **Edit** (Pencil icon). Edit the form name as below.



Note: LA is short for Loan Application.

11. Click **OK**. Repeat and rename all the forms as below:

	Form name	Category	Activity name	Process name	Activity type
☑	LA_LoanApproval	Applications	Loan Approval	Loan Application	Ordinary activity
☑	LA_GenerateRejectionLetter	Applications	Generate Rejection Letter	Loan Application	Ordinary activity
☐	Loan ApplicationEmail Forms	Applications	Email Forms	Loan Application	Ordinary activity
☑	LA_PostForms	Applications	Post Forms	Loan Application	Ordinary activity
☑	LA_WaitForForms	Applications	Wait for Forms	Loan Application	Ordinary activity
☐	Loan ApplicationGenerate Confir...	Applications	Generate Confirmation Letter	Loan Application	Ordinary activity

Note: Any manual activities are automatically detected in the selected process (and any associated processes). The **Update processes with associated forms** property is selected. This property links the activity in the process to its corresponding form.

12. Click **Generate and release**.
    Note: The forms become visible in the Forms list page.

LA_CreateNewLoanApplication	Trainee
LA_GenerateRejectionLetter	Trainee
LA_LoanApproval	Trainee
LA_PostForms	Trainee
LA_WaitForForms	Trainee

13. After the forms have been built, note that the process has been updated to reflect the forms that were created. The Job Creation Form property of the process now reflects the Create new job jorm. The Associated file path property of each manual activity now reflects the take activity form name of that activity.

Job creation form	LA_CreateNewLoanApplication ×
Associated file path	LA_LoanApproval.form ×

14. Return to the Forms list page and open the **LA_LoanApproval** form. Notice that there is a field that will display the **Help text** that you entered earlier in the course. Notice the Input variables (read only) and Output variable (editable). The data types of each control have also been set accordingly.

15. **Close and unlock** the **LA_LoanApproval** form.
    Note: We will test all the Loan Application forms in the next lab where you will be configuring site navigation and menu security.

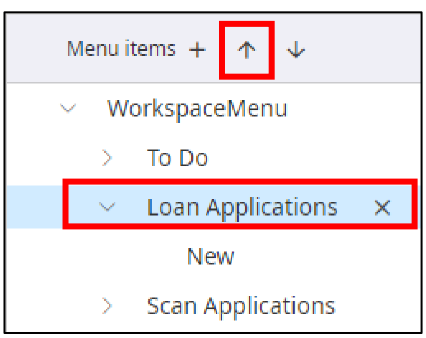
Lab 12-2

Configure Navigation

Add a Menu Item to the Site Navigation Menu

In this part, you will modify the WorkspaceMenu menu by creating a new menu item that will redirect to the Loan Application Create New Job form.
Note: You can either edit the menus provided in the Workspace or create your own menus. In practice it is recommended that you create a new menu rather than customize the out of box workspace menu.

1. From the **Main** menu navigate to **User interface > Navigations**.
2. Open the **WorkspaceMenu** (Default Category).
3. Click the **+** icon (Add) and select the new menu.
4. Set the new main menu item name to **Loan Applications**.
5. Click **Add** to create a submenu item.
6. Configure the following sub menu options:
   Menu Name: **New**
   Redirect Target: **LA_CreateNewLoanApplication**
   Window: **Same window**
7. Use the up/down arrows to Move the Loan Applications menu so that it appears after the **To Do** menu.



8. Leave the menu open for next part.

Navigation Security

9. Select the **Loan Applications** menu.
10. Select the **Access permissions** tab.
11. Select **Deny everyone except** and click **Add**.

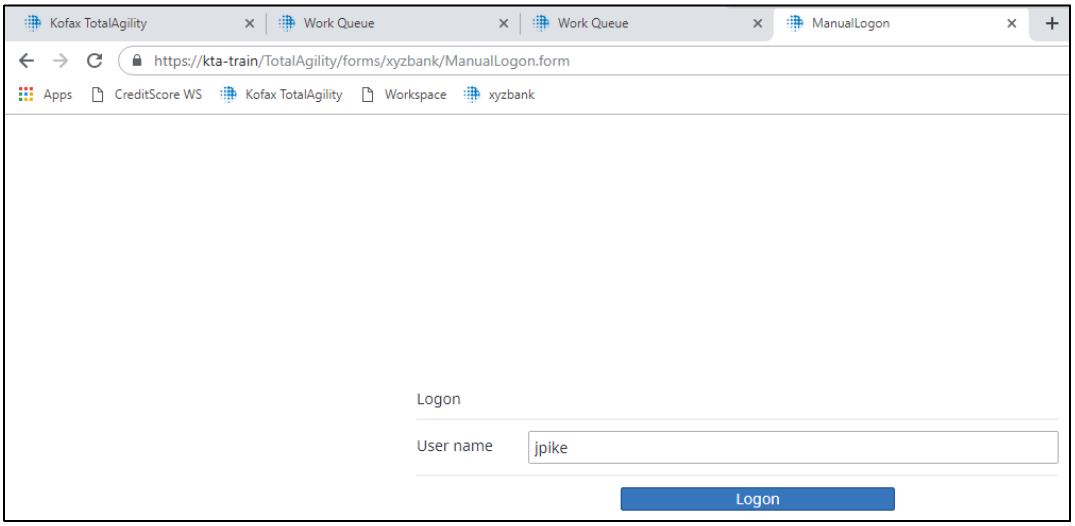
12. Select the **Group** tab, set the **Category** to **XYZ Bank**, and add the **Admin** group.

13. Click **Done**, and click **Save**.

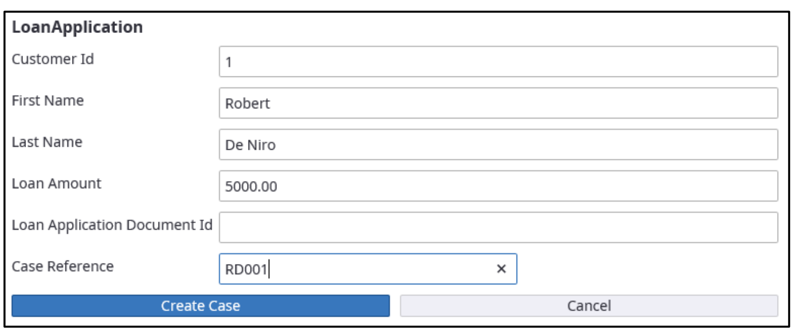
Lab 12-3

Testing the Loan Application Forms

1. Open the **browser** and click the shortcut on the toolbar menu to logon to the **xyzbank** site.
2. Logon as **jpike**.

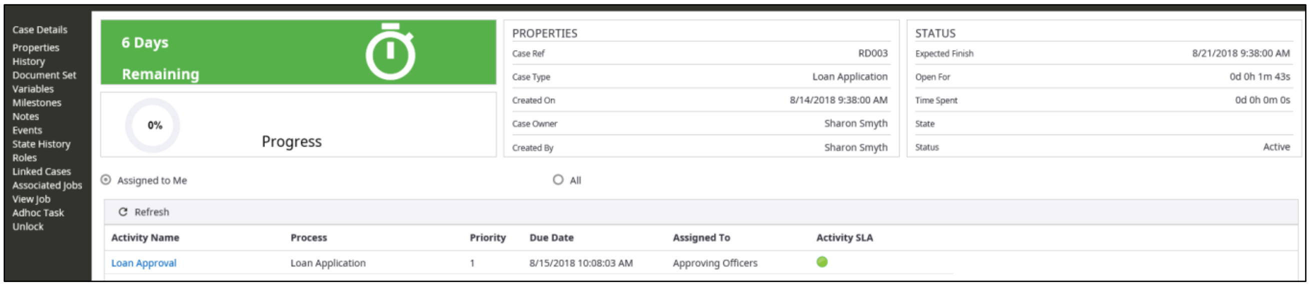


3. Select **Loan Applications > New.**
4. Leave all default values and set Case Reference **= RD001**.
Note: The values should be **Customer Id** = **1**, **First Name = Robert**, **Last Name** = **De Niro**, and **Loan Amount = 5000**.



5. Click **Create Case**.
6. Open a new tab in the browser and log on as **ssmyth**.

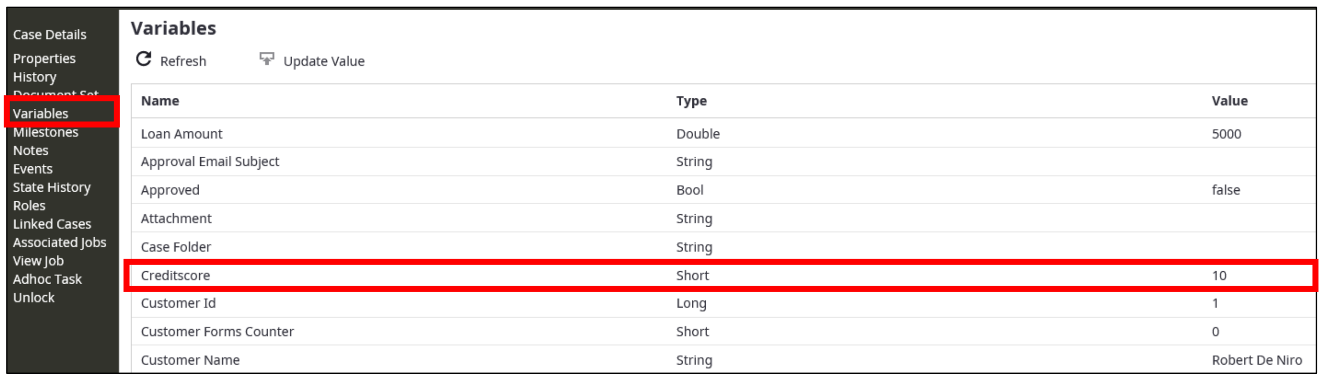
7. Select **Jobs** > **Find**. Click the **Process Name** link to open the Case Details.



8. The **Loan Approval** activity should be pending. The **Credit Check** activity should have completed (leave the case details screen open).

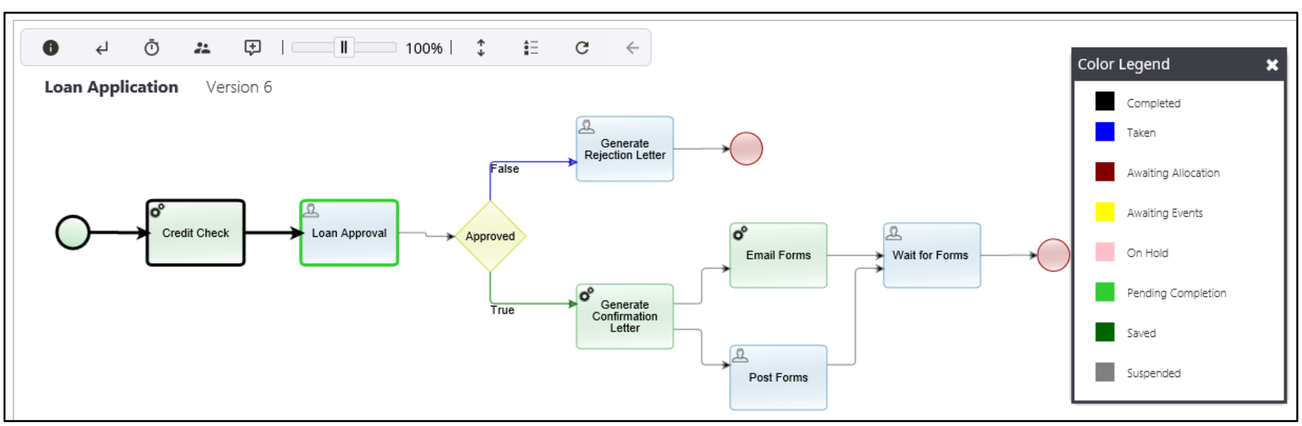
9. In the left navigation bar (**CaseDetailsMenu**), click on the **Variables** link.

10. You should see a **Creditscore** of **10** for the Customer Id of 1 that you entered earlier.



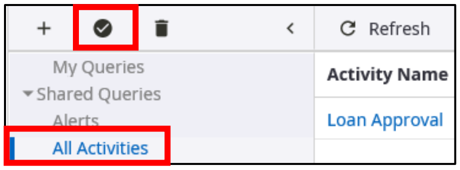
11. Now click on the **View Job** link on the left navigation. This will show which activity is pending in the **Loan Application** case process.

12. The **Loan Approval** activity should be pending.

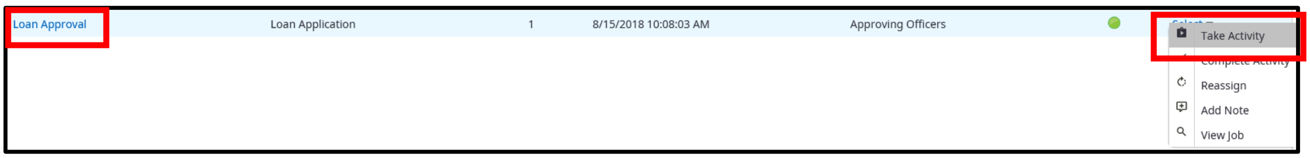


13. Select **To Do > Work Queue**.

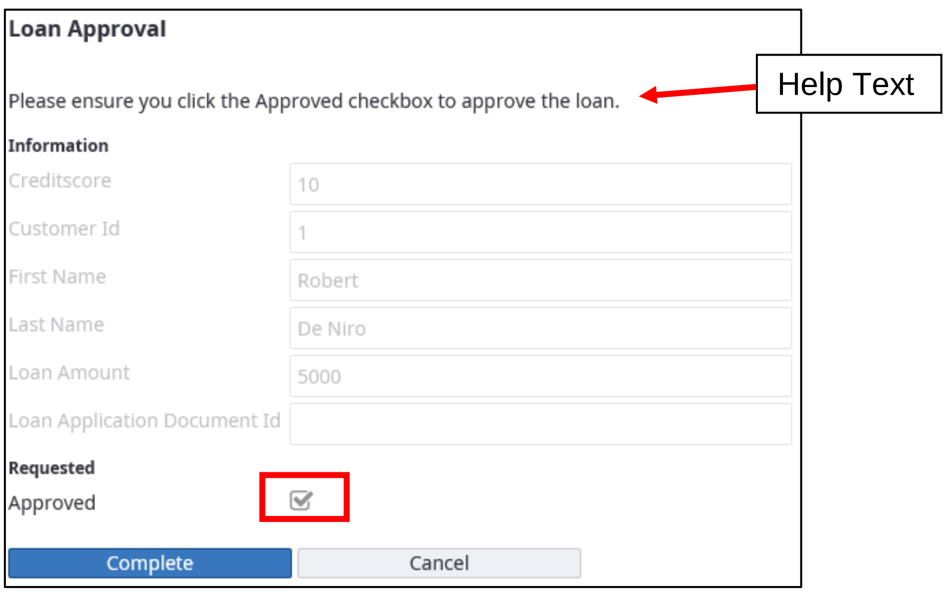
14. Select **All Activities** in the **Query** panel and select **Set As Default**.



15. Click the **Activity Name** hyperlink to take the activity.
Note: Alternatively, from the **Actions** column, click on **Select** and then click on **Take Activity**.



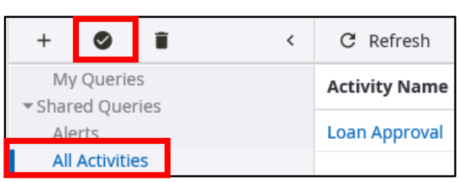
16. Review all the loan information, select the **Approved** checkbox and click **Complete**.



17. Notice when logged in as **Sharon Smyth** that she does not have access to the Loan Applications menu.

18. Navigate to **jpike's** work queue.

19. Select **All Activities** in the **Query** panel and select **Set As Default**.



20. The next pending activity will be **Generate Confirmation Letter**.

21. Take and complete the **Generate Confirmation Letter** activity.

22. The **Post Forms** and **Email Forms** activities become available.
    Note: The Post Forms activity is individually assigned to jpike (we are using Resource assignment called **Same as Previous** and have set it to **Job Creator**).

Activity Name	Process	Priority	Due Date	Assigned To
Email Forms	Loan Application	1	10/5/2018 4:17:13 PM	Admin
Post Forms	Loan Application	1	10/8/2018 9:47:14 AM	Jane Pike

23. **Complete** the manual **Post Forms** activity. The **Email Forms** activity will remain in the work queue due to the dependency we set in an earlier lab. Both activities must be completed before the next activity becomes pending.

24. **Complete** the **Email Forms** activity.

25. The **Wait for Forms** activity becomes pending.
    Note: In practice, the Wait for Forms activity would automatically be completed when the customer has returned their documents. In this lab, you will assume the documents have been returned, so if you wish you can manually take and complete the activity, which will complete the job.

Revision Questions

1. What form type could you build if you need to create an instance of a case process?

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2. You need to ensure that only the Approving Officers group can access a specific menu item in the navigation bar. What steps would you take to achieve this?

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3. When you open a case type job from the Find Jobs menu, is the case details form different than what you would see if you were examining the details of a job created from an ordinary process?

   ____

4. What does Same As Previous mean?

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