

## TECHNICAL TRAINING LAB INSTRUCTIONS

In this lab you will learn how to create a new case definition for the downstream loan application process.

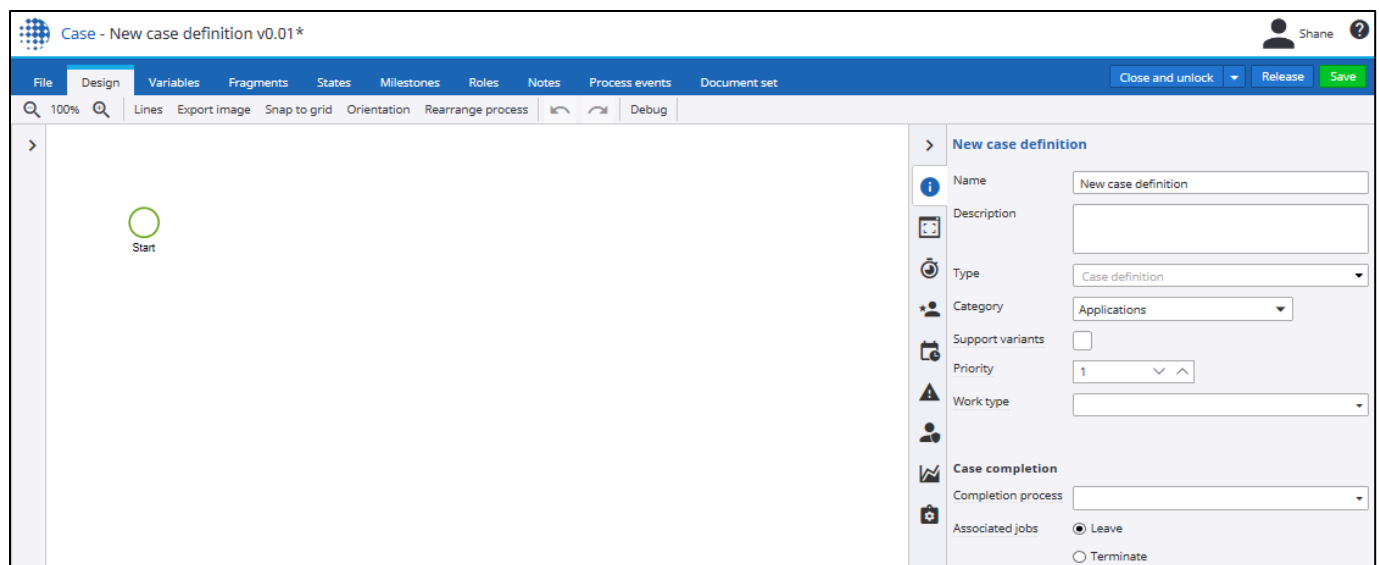
## Lab 10-1

### Create a Loan Application Case

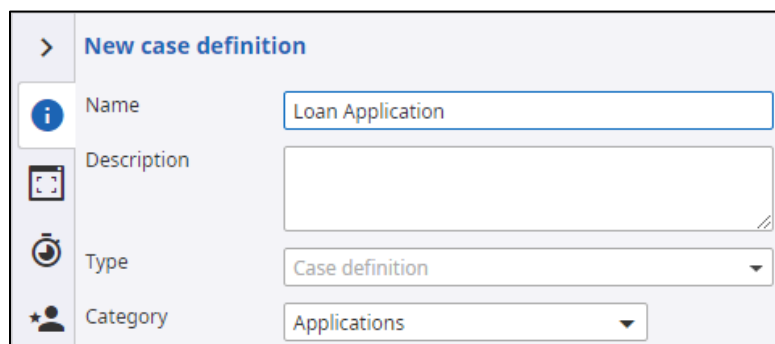
#### *Create a New Personal Loan Case Process*

In this part, you will create the Loan Application Case Process.

1. From the **Main** menu navigate to **Workflow > Case definitions**, and click **New**
2. A new case process is created, and the **Process designer** is displayed in a new browser tab.



3. From the **Properties** panel, set the Case definition **Name** to **Loan Application**.  
**Note:** The process is automatically stored in the Applications category.




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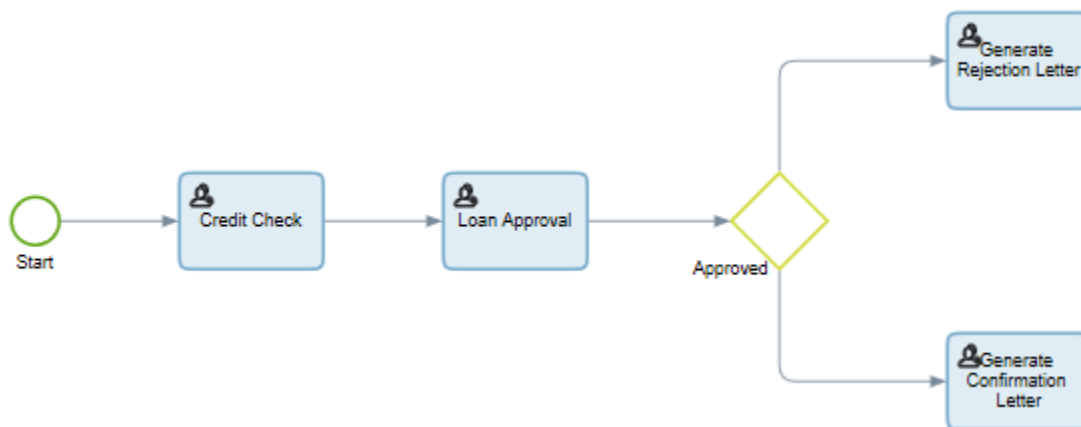
*Add Ordinary Activities*

In this part, you will add ordinary activities to the Loan Application Case Process. A loan application is approved or rejected by an Approving Officer. If a loan application is approved, the applicant will be sent some forms by either email or post (traditional mail). If a loan is rejected, the applicant will be sent a rejection letter.

4. Click the **Start** activity to display the **Satellite** activities.



5. Click Activity  and rename to **Credit Check** (click an activity in the satellite, click away, or press the Tab key to leave the activity after entering the name).
6. Draw the process illustrated in the graphic below:



**Note:** At Design Time a decision activity must have 2 paths. At Run Time, only one will be executed.

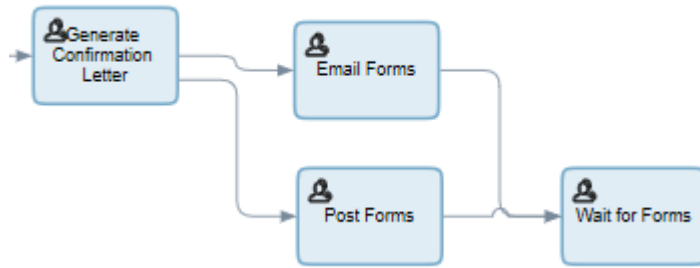
*Add Parallel Activities*

In this part, you will add a parallel activities to the process. Parallel activities are activities that are offered at the same time and can be performed in parallel, in any order. In this example, a business analyst had identified that loan forms should be posted and emailed to the applicant.

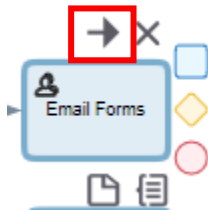
7. Add two ordinary activities in parallel, after **Generate Confirmation Letter**.
8. Add a third activity after the parallel activities.

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9. Name the activities as illustrated below:



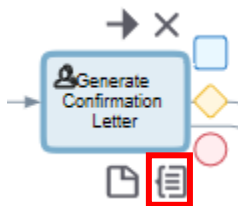
10. Connect the activities as illustrated above if not already connected. To connect activities click the first activity. On the satellite activities hold the left mouse down over the **Link** icon and drag to the next activity.



### Add Annotation Text

In this part, you will add annotation text to the Loan Application Case Process. Annotation text can be used to help a business analyst document a specific activity in a business process.

11. Select the **Generate Confirmation Letter** activity (to display the Satellite activities) and click the Annotation activity.

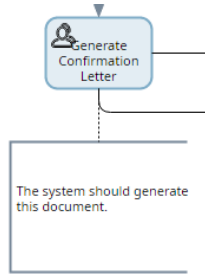


12. Enter the following text for the annotation via the **Properties** panel:

The system should generate this document.

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13. The process should look like this:



### Add Help Text

In this part, you will add Help Text to an activity. Help Text can be used to provide users with additional information about how to complete an activity. Help Text can be static text or a URL. In this example you will add some static help text to the loan approval activity.

14. Select the **Loan Approval** activity.

15. From the **Properties** panel, enter the following **Plain text** into the **Help text** field:  
*Please ensure you click the Approved checkbox to approve the loan.*

The screenshot shows a configuration panel titled "Help text". It has two radio buttons: "Plain text" (which is selected) and "URL". Below these buttons is a large text area containing the text: "Please ensure you click the Approved checkbox to approve the loan." There is a small icon in the bottom right corner of the text area.

**Note:** The Help text will automatically be displayed on the Activity form that you generate for this activity in a later lab.

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*Configure the Decision Activity*

In this part, you will configure the decision to evaluate whether an approval officer has approved or rejected the loan.

16. Select the **Approved** decision.

17. From the **Properties** panel, from the **True path** dropdown, select **Generate Confirmation Letter**.

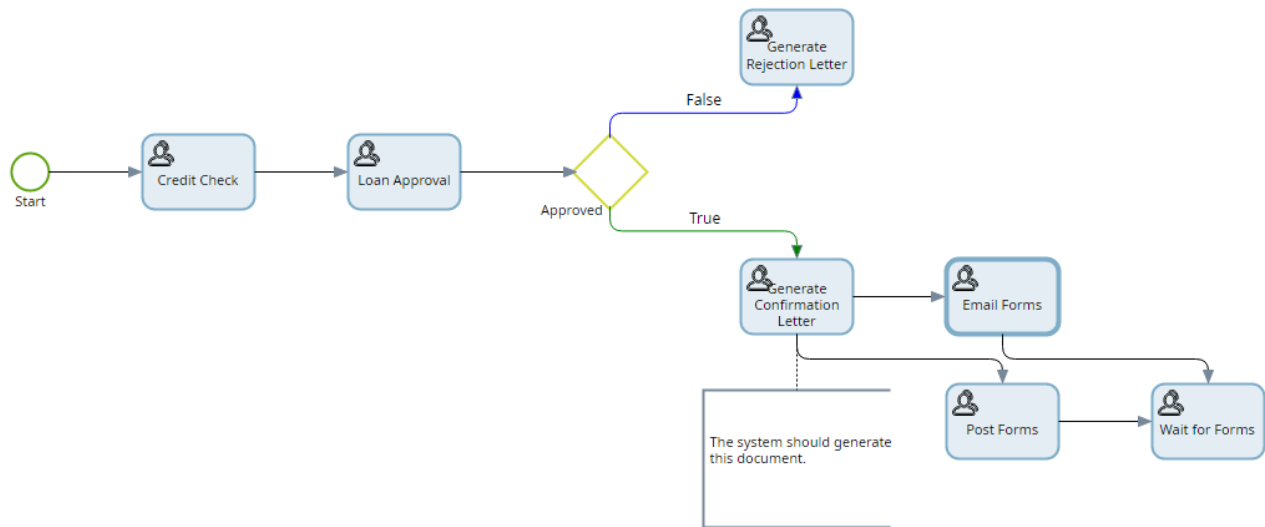
18. Set the **Condition text** to **True** (we will change this expression in a later lab).

The screenshot displays the configuration interface for an 'Approved' decision activity. The 'Name' field is set to 'Approved' and the 'Type' is 'Decision'. Under the 'CONFIGURATION' section, the 'Condition text' field is highlighted with a red box and contains the value 'True'. Below this, there is a 'Case sensitive' checkbox which is checked. A 'Validate' button is located to the right of the condition text field. At the bottom, the 'Outcome' section is also highlighted with a red box, showing the 'True path' dropdown menu set to 'Generate Confirmation Letter'.

19. **Save** the process (ignore the warnings and click **Yes**).

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Your process should look like this:



### Set Dependencies for Parallel Activities (Post Forms and Email Forms)

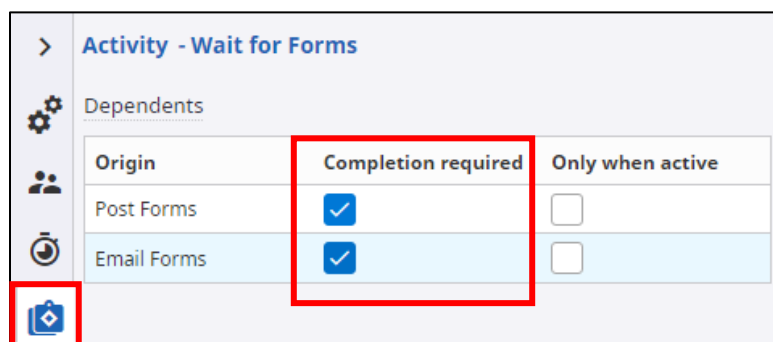
In this part, you will modify the process to ensure that the wait for forms activity will only become pending when both Post Forms and Email Forms are complete (AND).

**Note:** The default dependency between parallel activities is OR, i.e. either activity can be complete before the next activity becomes pending.

20. Select the **Wait for Forms** activity.

21. From the **Properties** panel, select the **Dependents** tab.

22. Select **Post Forms** and **Email Forms** as dependents (Completion required).



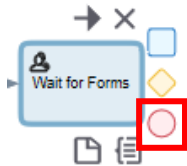
23. **Save** the process (click Yes to ignore any warnings).

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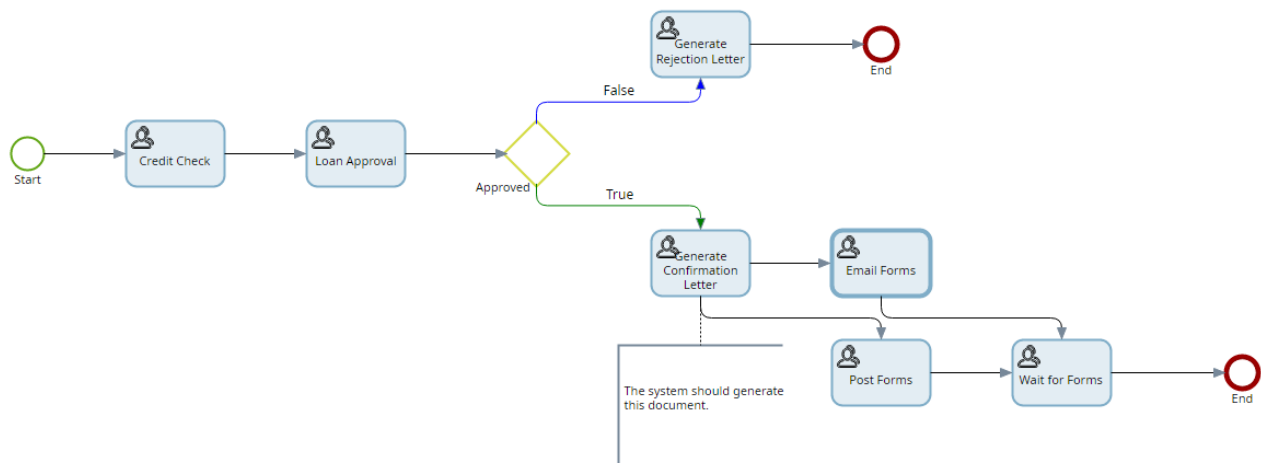
*Add an End Point*

In this part, you will add a couple of End Points.

24. Select the **Wait for Forms** activity and from the **Satellite** activities, click **End Point**.



25. Select the **Generate Rejection Letter** activity and from the **Satellite** activities click **End Point**. The completed process should look like:



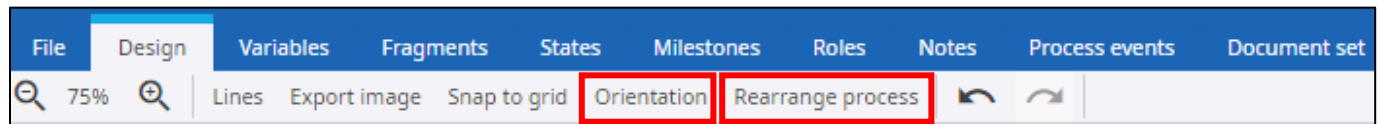
**Note:** You can connect multiple activities to one end point or have multiple end points.

*Process Orientation/Layout*

In this part, you will change the process layout.

26. With the **Design** tab selected, click **Orientation**. Click **Orientation** a second time.

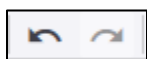
**Note:** You can use the magnifying glass in the top left corner to zoom in/out.



27. On the **Design** tab, click **Rearrange process** to automatically rearrange the process.

**Note:** Exercise caution when using rearrange on large processes. The rearrange feature may not arrange the process the way you wish.

28. Use the **Undo** icon if you wish to return to the previous process layout.



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*Release the Case Definition*

In this part, you will release the Loan Application Case Process. You must release the process if you wish to test it.

**Note:** Releasing will save the process and give the process a major version number.

29. Click **Release**.





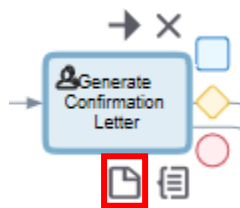
## Lab 10-2 – Self Learning (Do not complete in class)

### Attachments

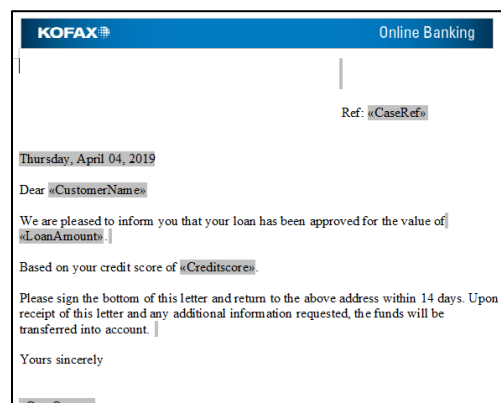
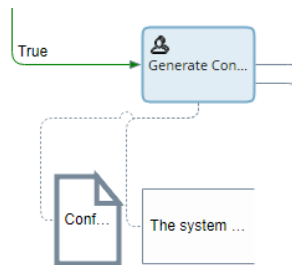
#### *Add an Attachment*

In this part, you will attach a Microsoft Word document containing the confirmation letter to the **Generate Confirmation Letter** activity.

1. Select the **Generate Confirmation Letter** activity (to display the Satellite activities) and click the **Attachment** activity.



2. From the **Properties** panel, enter **Confirmation Letter** as the attachment **Name**.
3. From the **Properties** panel, in the **Document Path** property, and enter the following value:  
<https://kta-train/LoanCases/Templates/LoanConfirmation.dotx>.  
**Note:** You must have completed Lab01 (Installing Word Templates and Creating a Virtual Folder for this to work).
4. Your process should look like this and you can download and open the Confirmation Letter by double-clicking on its icon (the download will display in Chrome as the bottom left hand corner):



**Revision Questions**

1. Case processes should be used when?  
\_\_\_\_\_  
\_\_\_\_\_
2. What type of process should you use when you have highly repeatable and predictable process flows?  
\_\_\_\_\_
3. A case must always have a case reference?  
\_\_\_\_\_
4. A case is a job in the system?  
\_\_\_\_\_
5. Why would you use annotations in a process?  
\_\_\_\_\_  
\_\_\_\_\_
6. You need to ensure that 3 parallel activities are completed before the next activity becomes pending. What feature would you need to use to achieve this?  
\_\_\_\_\_
7. A decision at design time has how many paths?  
\_\_\_\_\_
8. A decision at run time has how many paths?  
\_\_\_\_\_
9. Can you save a process when a decisions condition text has been left blank?  
\_\_\_\_\_
10. What is the True path?  
\_\_\_\_\_  
\_\_\_\_\_
11. What is the purpose of Help text and where is this text displayed at runtime?  
\_\_\_\_\_  
\_\_\_\_\_
12. An attachments path must always be a?  
\_\_\_\_\_
13. Can you delete a case definition if there is a job in the system that has been created from the case definition?  
\_\_\_\_\_
14. A designer has updated a case definition and saved the process. Can the designer test the saved process at runtime?  
\_\_\_\_\_

**TECHNICAL TRAINING LAB INSTRUCTIONS**

15. A designer has updated a case definition and saved the process. Can the designer debug the saved process at design time?
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