CREATING A SIMPLE PROCESS

Outline

- Create Workflow Application
- Model "Loan Application Process"
- Assign Roles to Loan Application Process
- Define User Defined Attributes (UDA)
- Generate Process Definition Documentation

Process Steps

1. Customer applies for a loan at the bank branch
2. Loan Application and possibly an electronic copy (pdf attachment) of the application is sent for processing
3. Credit Check is performed
3. Welcome pack is mailed including legal documents and bank policies, (this could be a Compliance requirement)
4. Loan officer is assigned to review the loan application
5. Loan officer either approves or rejects the loan
6. If rejected, send out a rejection letter
7. if loan is approved, create Loan account and transfer funds
8. Send email to Loan Agent that the loan was approved

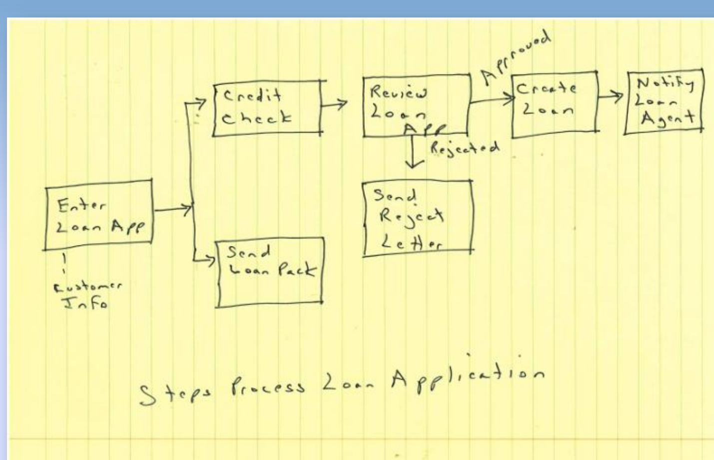
Loan Application Data Elements

- Customer first and last name
- Address
- Loan Amount
- Type of loan, personal or business
- Purpose of loan
- And More….

Roles in Loan Application

- Roles defined
  - Loan Agent
  - Loan Officer
  - Customer Service

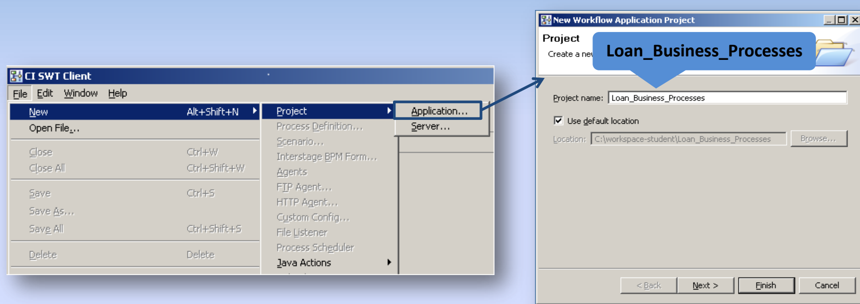
Loan Application BPD



Create Workflow Application

FUJITSU

- Create a new project Application “Workflow Application”
  - Process definitions and all related files are packaged together
  - Files packaged as a BAR file



Workflow Application Description

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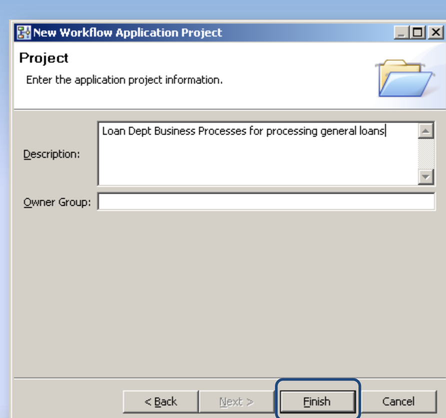
- Enter a Description
- Leave Owner Blank



Workflow Application Layout

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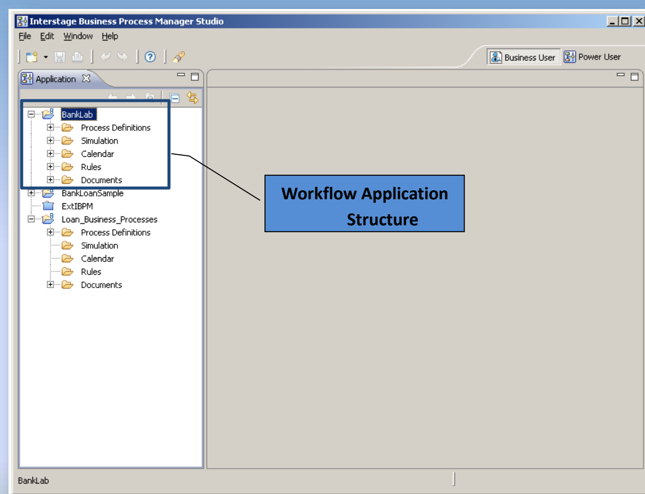
- Workflow Application contains designated folders



Create Process Definition - 1

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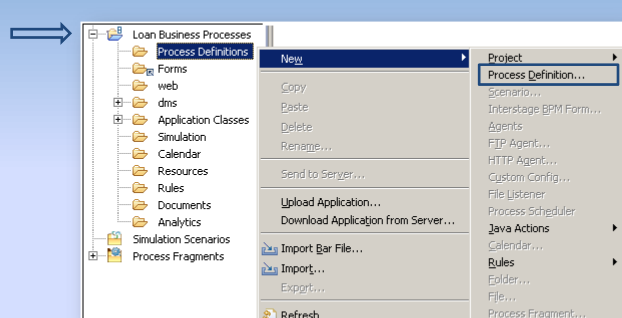
1. Select Workflow project
2. Navigate "New→ Process Definition"



Create “Apply for Loan” Business Process

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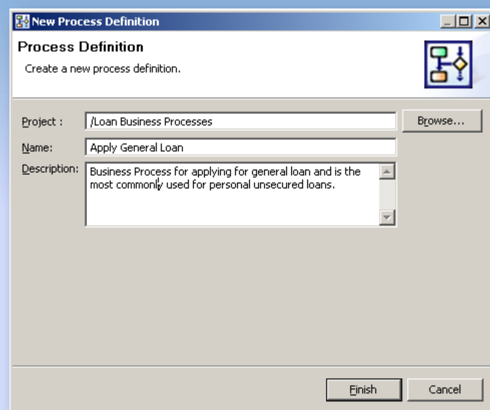
- Enter name and description of Business Process
  - “Apply General Loan”



Model Process Definition

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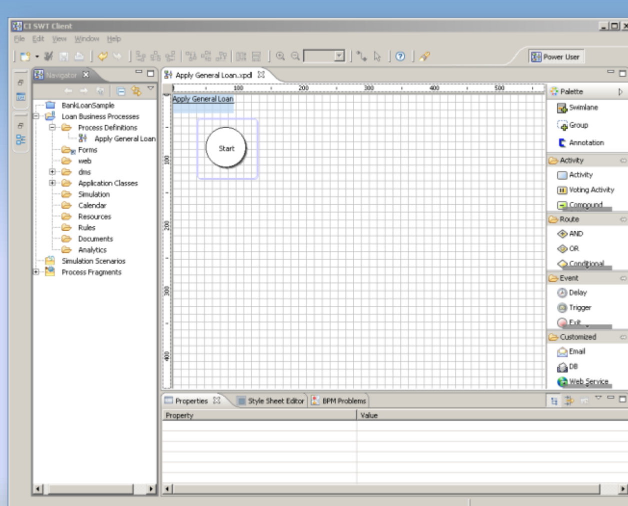
- Model the “Apply General Loan”



Adding Nodes and Properties

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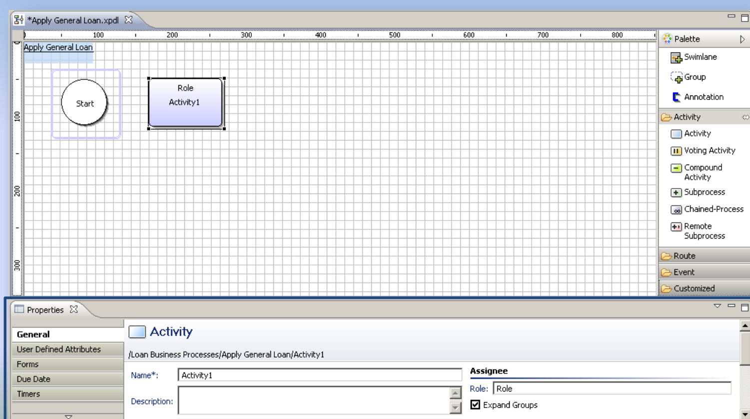
- Name – name of activity
- Description – description of the process step (this is added in email notification)
- Role – the group assigned to carry out the work



Configure Activity Node

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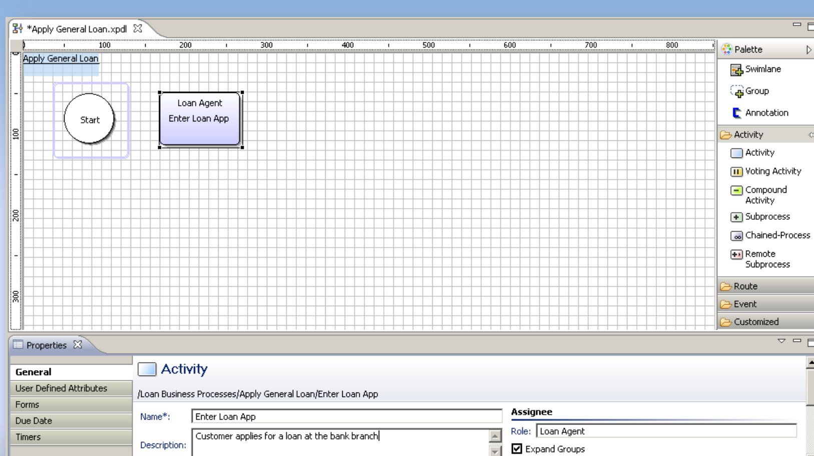
- First step in processing loan – “Enter Loan Application”
- Work will be performed by a Loan Agent



Adding Annotations

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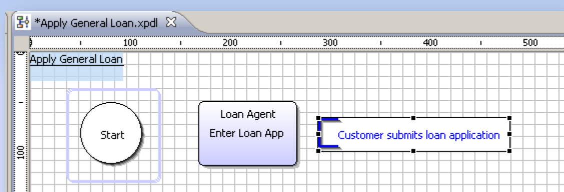
- Add annotations for documenting information related to process model.
- Documentation can also be provided in description, but Annotations are visible on the process model



Connecting Nodes

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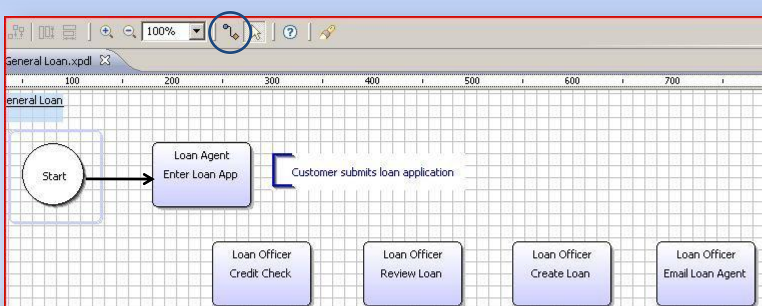
- Connect nodes with arrows
  - Click on the *From* node and drag to the *To* node.
  - Change arrow name to resemble the choices the user will make during the process execution
  - Example: “Accept” or “Reject” a loan application



Parallel Tasks

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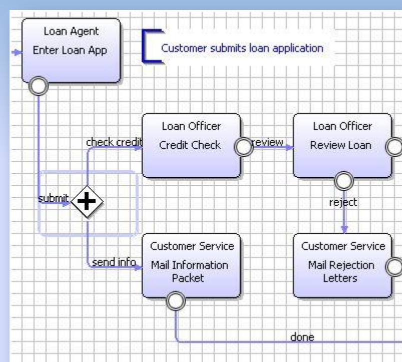
- Parallel processing after Loan Application is submitted
  - "Credit Check" and "Mail Welcome Pack" tasks are performed in parallel



Add Swim lanes

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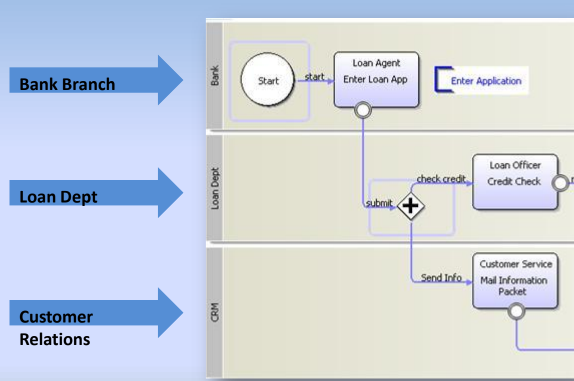
- Add Swim lanes to highlight areas of responsibility
- Swim lanes can run either vertically or horizontally
- Swim lanes add structure to diagrams



Add Swim lanes

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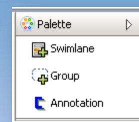
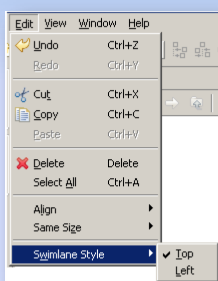
- Add Swim lane by selecting Swimlane from palette and drawing the Swimlane on the BPD



- Change Direction of the Swimlane by placing the title on top or left



User Defined Attributes

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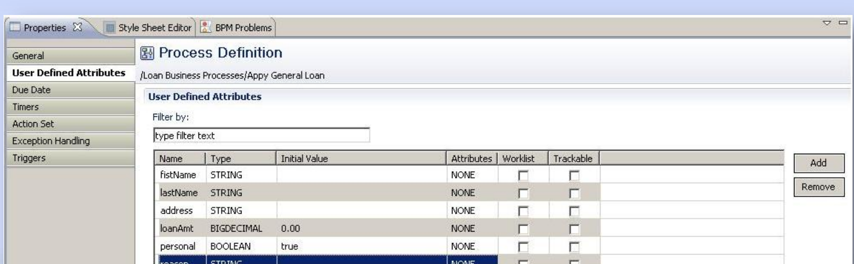
- Add UDAs

String	firstName, lastName, address
BigDecimal	loanAmt
Boolean	personal (default - true)
String	reason



Generate Process Documentation

- Generate Process Documentation
  - Feature available in Interstage BPM Studio
- Generates a simple report of a Process Definition
- Supported Report formats
  - PDF
  - Html
  - MS PowerPoint

Apply General Loan Documentation

Report Information :

Report Name :	Apply General Loan
Report Creation Date :	Mar 9, 2010 11:21:21 AM
Process Definition Name :	Apply General Loan

Process Definition Details :

Name :	Apply General Loan
Description :	Business Process for applying for general loan and is the most commonly used for personal unsecured loans.
Creation Date :	Mar 9, 2010 10:58:36 AM

Task Details :

Task1

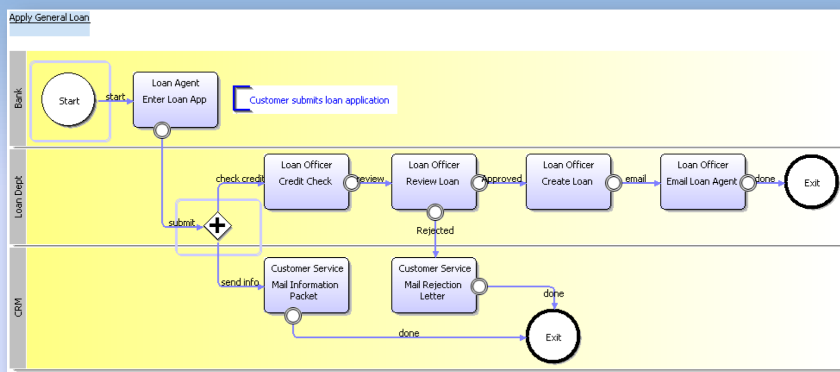
Name :	Enter Loan App
Description :	Customer applies for a loan at the bank branch
Assigned To :	Loan Agent
Due Date :	

Task2

Name :	Credit Check
Description :	Perform credit check on customer
Assigned To :	Loan Officer
Due Date :	

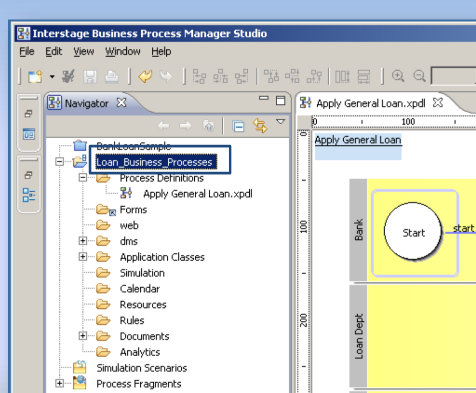
Completed Business Process

- "Apply General Loan" Business Process Diagram (BPD)



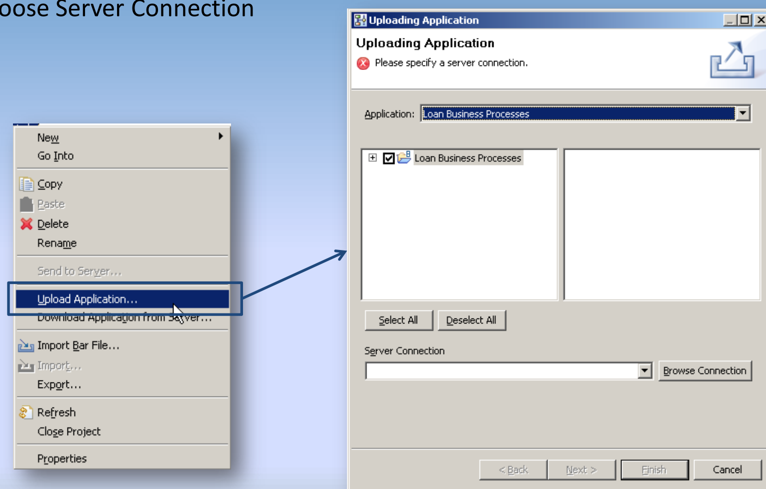
Deploying Workflow Application

- Deploy Workflow Application
  - Upload Business Process Definitions and related files and resources to Interstage BPM Server



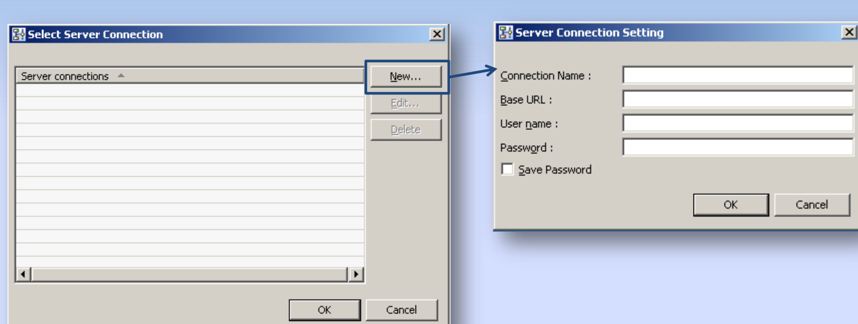
Deploy Application

- Select Upload Application
  - Choose Server Connection



Create Server Connection

- Create New Sever Connection
  - Connection Name
  - Base URL
  - User name and Password



Create Server Connection Settings

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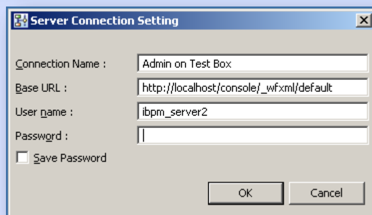
- Connection Name: “Admin on Test Box”
- Base URL: http://<host:port>/console/_wfxml/<tenant name>
  - e.g. “http://localhost:49950/console/_wfxml/default”
- User name and Password
  - Admin user access is required to deploy



Select Server Connection

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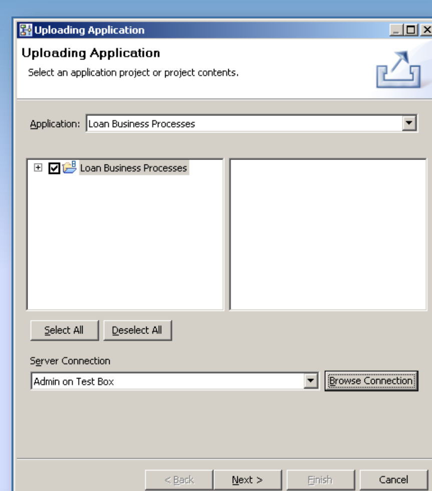
- Select Server Connection
  - “Admin on Test Box”



Create or Update Workflow Application

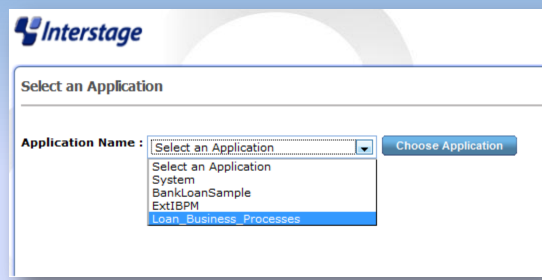
- Create Workflow Application
- Update Workflow Application

Interstage BPM Console

- Administer Workflow Application using the Interstage BPM Console

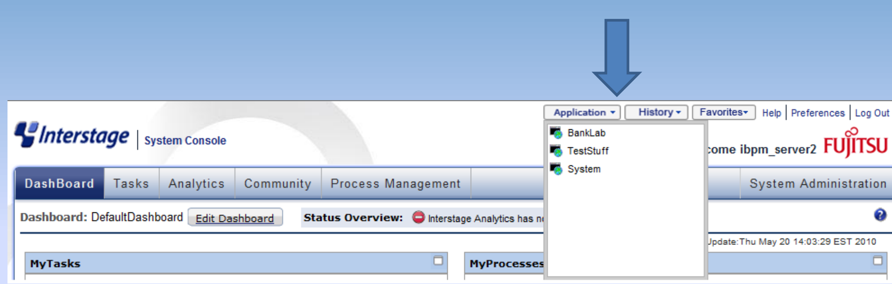
Interstage BPM Console

- Select Workflow Application
  - Loan_Business_Processes



Application Selection

- Change Application Selection
  - Select Application Dropdown

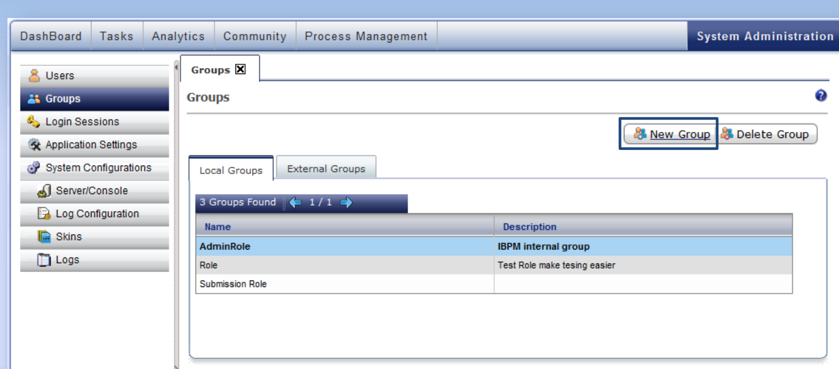


Creating Users and Groups

- Prior to executing a Business Process ensure all roles exist on the server
- Business Process “Apply General Loan” needs these roles
  - Loan Agent
  - Loan Officer
  - Customer Service

Create Roles (groups)

- Select “System Administration” Tab
- Select Groups
- Click “New Group”



Group Details

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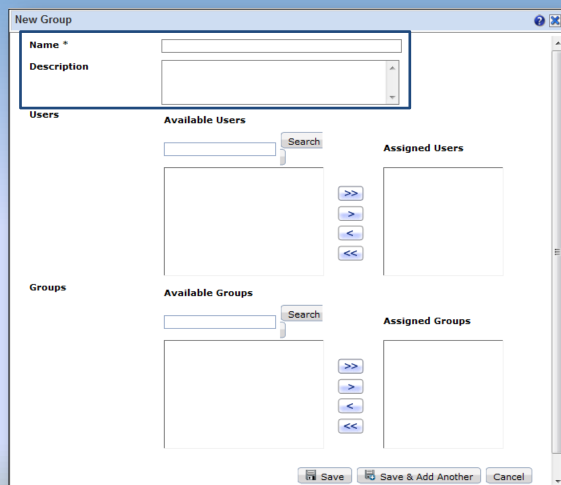
- Enter Group Details
  - Name
  - Description



Loan Example Groups (roles)

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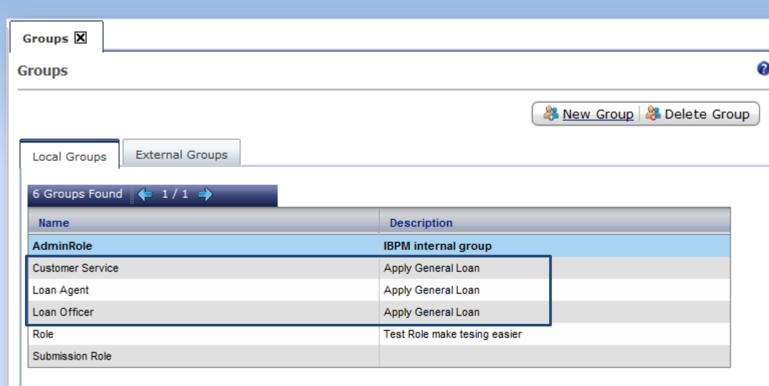
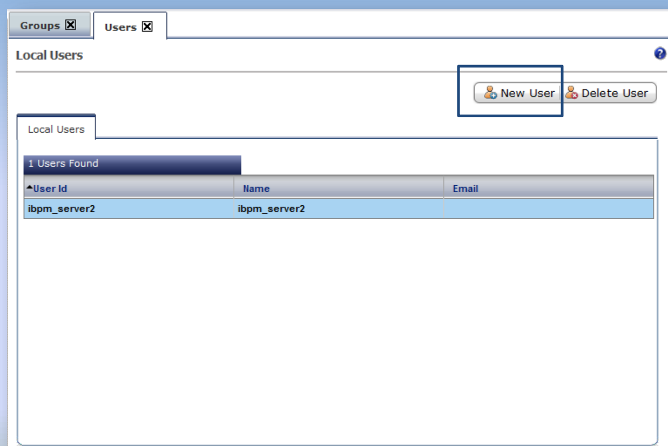
- Groups required for Loan example



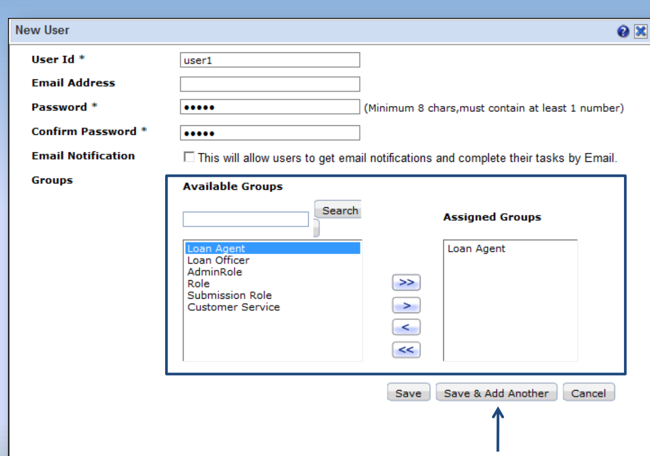
Adding Users

- Select Users Tab
- Click New User



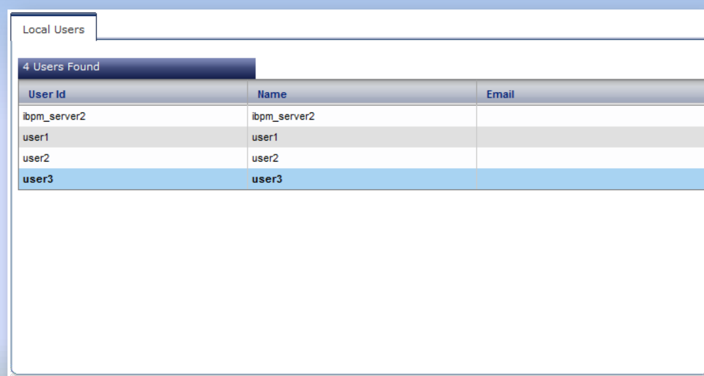
Enter User Details

- Enter User Id, Password (min 8 chars and 1 numeric)
- Assign Group



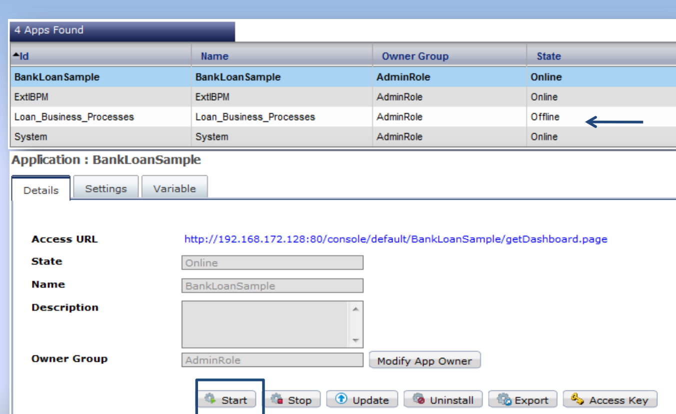
Loan Example Users

- Users required for Loan example
  - user1 – Loan Agent Role
  - user2 – Loan Officer Role
  - user3 – Customer Service Role



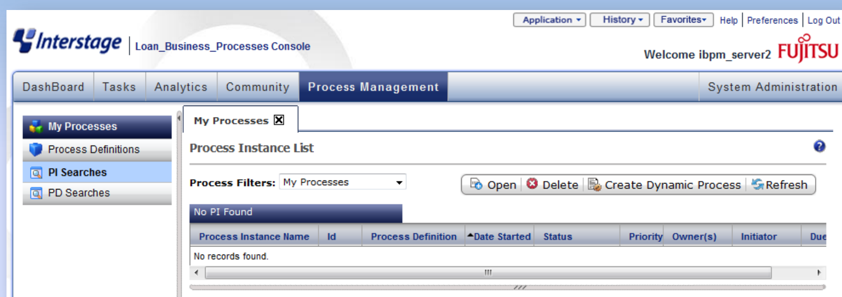
Start Bank Loan Application

- Start Loan_Business_Processes Workflow Application
- Initial State is *Offline*
- Click Start Button to change to Online State



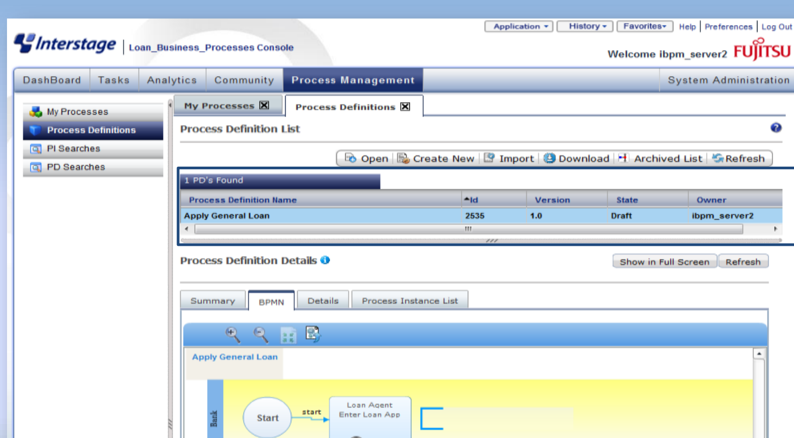
Process Definitions

- Navigate to Process Definitions Section
  - Process Management Tab



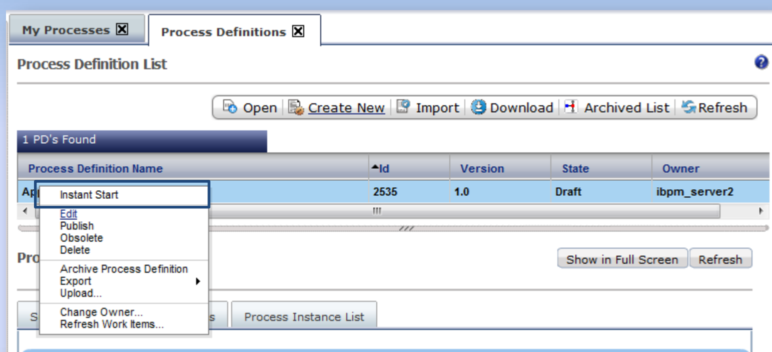
Process Definitions

- Select Process Definitions Tab
- Business Process Definition List



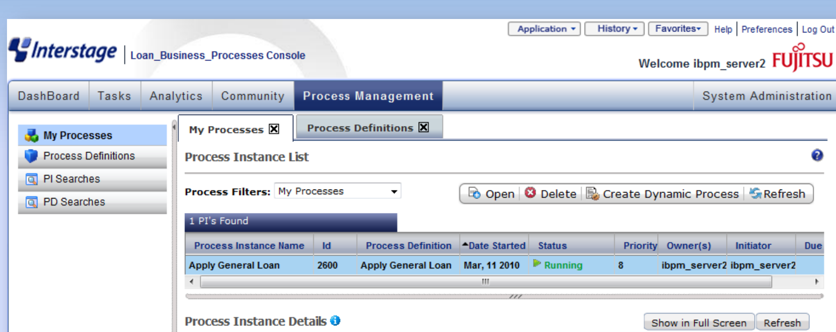
Start Process Definition

- Start (execute) “Apply General Loan” Process Definition
- Right-Click on Process Definition
- Click *Instant Start*



Process Instance Status

- Change to My Process Tab
- Check the status of running business processes

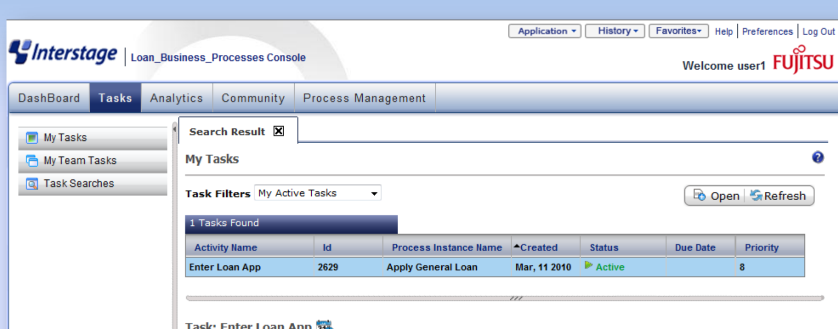


Process User Login

- Log-in as user1 – member of Loan Agent Group

User1 Tasks

- Login as user1
  - member of Loan Agent Group
- Tasks for user1 are displayed
  - Allowing for quick and easy access to workflow



Performing Work - Details

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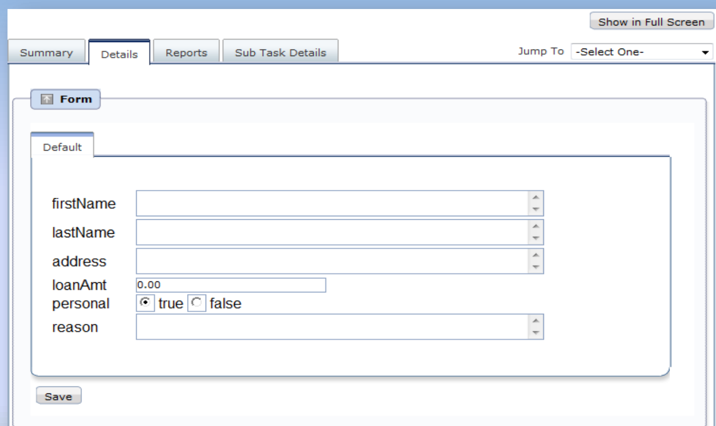
- Change to Details Tab
- Form displays UDA values for the workitem



Performing Work – Details

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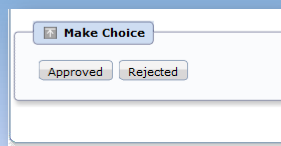
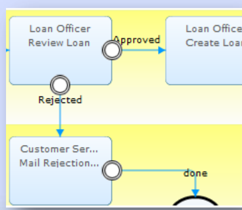
- Make Choice – Submit Loan Application

Making a Choice

- "Review Loan" activity choices are "Approve" or "Reject"
- Loan Officer decides to either Reject or Approve the Loan Request

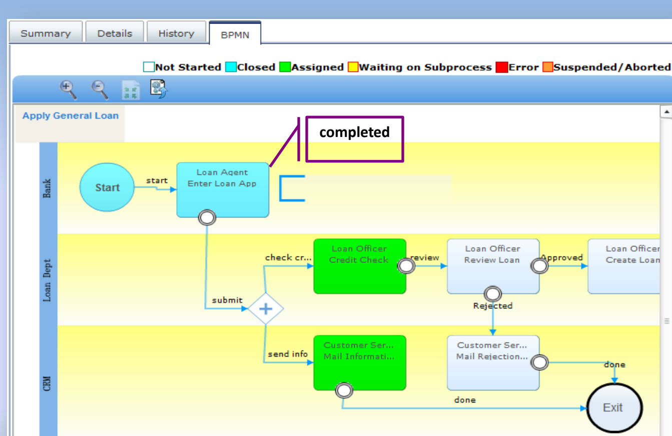


- Make Choice displays the Arrows defined in the Process Definition.



Reviewing the Status as Process Owner

- Login as Process Owner
- Select the "Apply General Loan" process instance



Process Definition – System Attributes

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- Essential attributes of a process definition
  - Name
    - the name of the process definition
  - Title
    - the title of the process definition
  - Description
    - what the business process represents
  - **Process owners**
    - who will be in charge of monitoring this process
  - **Version**
    - the version of the process definition
  - **State**

Process Definition Version and State

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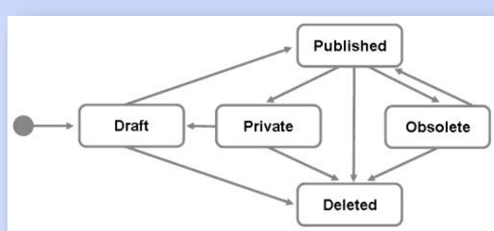
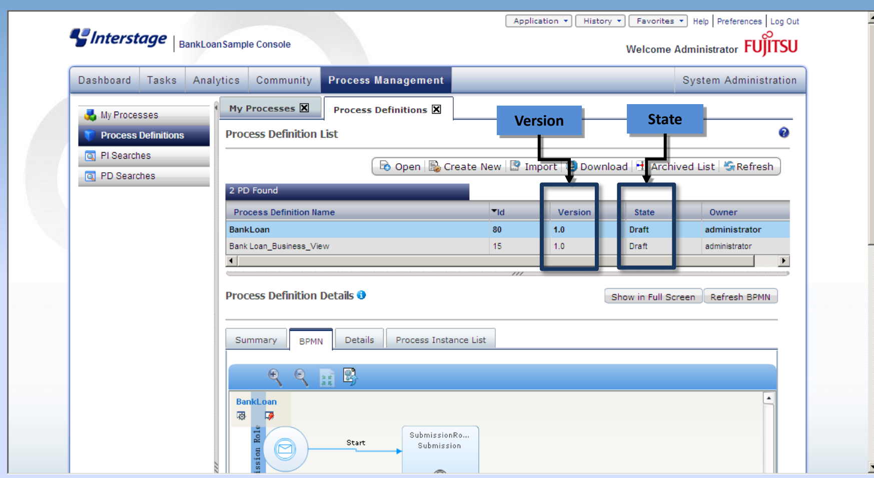
- New process definitions are automatically assigned a version number of 1.0, e.g. “Purchase Order 1.0”.
- Any update to PD results in a new version
- Process Definitions state defines where the process is, in its lifecycle
  - Definitions are by default in draft state
  - Definitions should be published in production environment
  - Published definitions cannot be edited



Process Definition - Version and State

FUJITSU



Process Instance States

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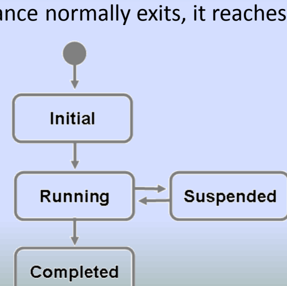
- A Process Instance transitions through many states during it's life cycle. These states are:
  - Initial
    - When a process instance is created, it is in "Initial" state until it is started.
  - Running
    - When a process instance is started, it transitions to "Running" state until it is completed or suspended.
  - Completed
    - When a process instance normally exits, it reaches "Completed" state.



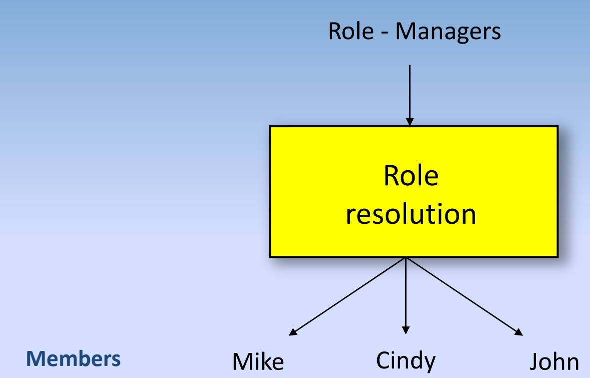
Process Instance States

- Suspended State
  - Process instance can be suspended during the course of execution.
  - Suspending a process instance temporarily removes it from the running state.
  - Any active work items or running sub-processes are also moved to suspended state.
  - *Suspended process instance cannot be modified.*
  - The process definition from which the suspended process instance was created, also cannot be modified.
- Resume/Reactivate
  - Resuming a suspended process instance activates it and state is changed to “Running”.
  - Any work items and sub processes are also activated.

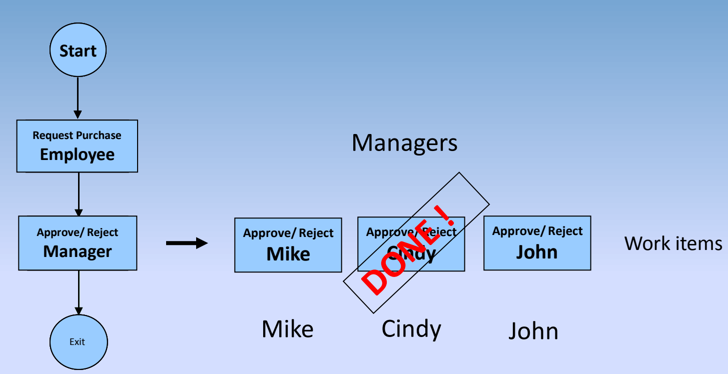
Task Assignment

- Activities need Role name as assignee
- Roles are “groups” of users with specific attributes, qualifications or authority (e.g. accountants, managers).
- Roles are resolved to members/users at runtime for task assignment.
- Work Items are created when the Process Instance reaches an Activity node.
- Individual work items for each member/user in the role is created
- Only one user can work on the task

Role Resolution



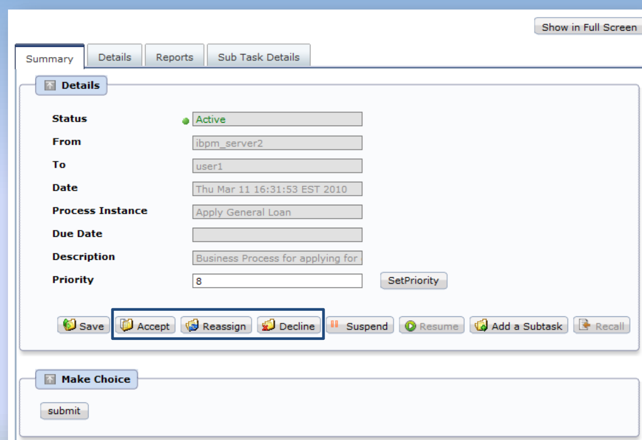
Work Item Creation



When a member of the group marks the work item as complete it disappears from the worklist of all members of the group

Performing Work

- Users select which tasks to work on
- Task Options (Accept, Reassign ,Decline)



Work Item Operations

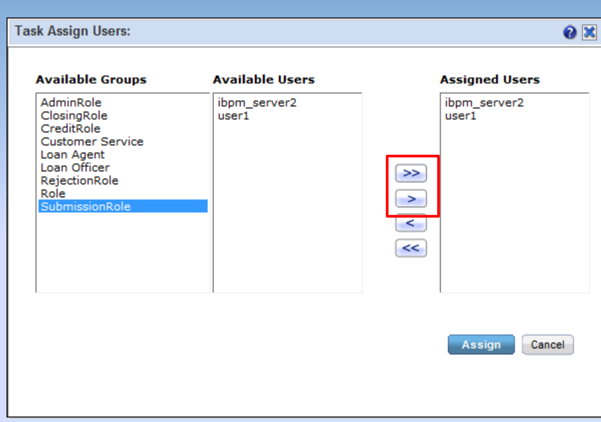
- Assigned user can perform these actions:
  - Make Choice (Complete)
    - Under the Choices tab the names of all of the outgoing arrows from the activity node are displayed
    - Selecting one of these will close the work item and the process will proceed forward along the selected arrow.
  - Save
    - Saves any changes in the work item
  - Accept
    - This assigns the work item to the user
    - No other assignee will be able to update the work item
  - Reassign- reassigns the work item to another assignee
  - Decline- to decline the work item.

Reassign Task

- Tasks can be assigned to another user or users if required
  - Assigned user is not available to work on the task
  - Information from another user is required to complete the task
- On Reassign, task is removed from original assignee's queue and assigned to new user/users.
- Assignment Mode Setting
  - Regular Mode – activity assignees or process instance owners can reassign
  - Process-Instance-Only – only process instance owners can reassign
  - No-Reassignment – reassignment is not allowed

Reassign Task

- Reassign Task to group or a specific user(s)



Work Item States

- Active – assigned to user or users
- Read - has been viewed by the current user
- Accepted - accepted by the current user and therefore unavailable (inactive) to other users in that role
- Declined - current user has declined the work item
- Inactive - another user has accepted this work item so it is unavailable for the current user
- Completed

shaping tomorrow with you