

Outline

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

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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

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Loan Application Data Elements

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

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Loan Application BPD

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Create Workflow Application FU						FUjITSU
-	Create a ne Process de Files packa	e w projec efinitions a aged as a E	ct Applicatic and all related BAR file	on "Workf files are pa	low Application" ckaged together	
	Cose Close Cose Cose Cose Cose Cose Cose Cose C	At+SYA+N Cri+W Cri+Sintew Cri+Sintew Cri+S Cri+Sintes Delete	Project Process Definition Scenario Interstage BPH Form Agents FIP Agent HTTP Agent HTTP Agent File Ustener Process Scheduler 2aya Actions	Application Server	Verw Workflow Application Project Project Create an Coan_Business_Process Protect name: [Losin_Barless_Processe // Use gefack location (color::	Ses Carcel
Interstag	ge BPM v11.2			7	Copyright ©	2010 FUJITSU LIMITED

Workflow App	Workflow Application Description รบ)้ทรบ					
Enter a Descript	ion					
Leave Owner Bl	ank					
	New Workflow Application Project Project Enter the application project information. @escription: Qewner Group:					
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Create "Apply	for Loan" Business Process	FUĴÎTSU
 Enter name and "Apply General 	d description of Business Process Loan"	
	Project : //Loan Business Processes processes processes processes processes process for applying for general loan and is the most commonly used for personal unsecured loans.	
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Adding Nodes and Properties

- 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



FUĴITSU **Configure Activity Node** First step in processing loan – "Enter Loan Application" Work will be performed by a Loan Agent 왕 *Apply General Loan.xpdl 🕺 Apply General Loan 100 😳 Palette 🛃 Swimlan Group Loan Agent C Annotation Enter Loan App Starl -> Activity Activity III Voting Activity Compound Activity Subprocess 🐻 Chained-Pro Remote Subprocess Route Event Customized Properties 🔀 ٠ Activity General User Defined Attributes /Loan Business Processes/Apply General Loan/Enter Loan App Forms Assignee Role: Loan Agent Name*: Enter Loan App Due Date Description: Customer applies for a loan at the bank branch Role: Loan Agent Timers

Adding Annotations

Add annotations for documenting information related to process model.

 Documentation can also be provided in description, but Annotations are visible on the process model

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S Apply Gener	100 · 200 ral Loan Start Loan Ag	ant Customer	400	
nterstage BPM v11.2		15		c



Parallel Tasks





Add Swim lanes

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

Se Palette	V
🛃 Swimlane	
ြည့် Group	
C Annotation	

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



User Defined Attributes					
Add UDAs					
String	firstName, lastName, address				
BigDecimal	loanAmt				
Boolean	personal (default - true)				
String	reason				
C > -	N== N				

User Defined Attributes	/Loan Business	Processes/Appy	General Loan				
Due Date	User Define	d Attributes					
Timers	Filter but						
Action Set	Puez Obau b						
Exception Handling	type niter t	ext					
Triggers	Name	Туре	Initial Value	Attributes	Worklist	Trackable	Add
	fistName	STRING		NONE			
	lastName	STRING		NONE	Г		Remove
	address	STRING		NONE			
	loanAmt	BIGDECIMAL	0.00	NONE		Г	
	personal	BOOLEAN	true	NONE			
	reason	STRING		NONE	Г		

Generate Process Documentation

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

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Apply Gen	eral Loan De	ocumentation	FUjÎTSU
	Report 1	Information :	
	Report Name :	Apply General Loan	
	Report Creation Date :	Mar 9, 2010 11:21:21 AM	
	Droppes Definition Name (And Description	
	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	a: Mar 9, 2010 10:58:36 AM	
	Task Deta	ils :	
	Name :	Enter Loan App	
	Description :	Customer applies for a loan at the bank branch	
	Assigned To	Loan Agent	
	Due Date :		
	Task 2		
	Name :	Credit Check	
	Description :	Perform credit check on customer	
	Assigned To	Loan Officer	
	Due Date :		
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FUĴĨTSU **Completed Business Process** "Apply General Loan" Business Process Diagram (BPD) Apply General Loan Loan Agent Bank Customer submits loan application Start start. Enter Loan App Loan Officer Loan Officer Loan Officer Loan Officer Exit Credit Check Review Loan Create Loan Email Loan Agen oan Dept С ubmit 🕂 Rejected Customer Service Customer Service send info Packet Mail Rejection Letter Exit Copyright © 2010 FUJITSU LIMITED



Deploy Application



Create Server Connecti	on		FUĴĨTSU
 Create New Sever Connection Connection Name Base URL User name and Password 	on		
Server connection	Edt Defete	Server Connection Setting Connection Name : Base URL : User game : Password : © gave Password OK	Cancel
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Create Server Connection Settings



Base URL: <u>http://<host:port>/console/_wfxml/</u><tenant name>

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- e.g. "http://localhost:49950/console/_wfxml/default"
- User name and Password
 - Admin user access is required to deploy

	Server Connect	ion Setting	×	
	Connection Name : Base URL : User game : Passwgrd : Save Password	Admin on Test Box http://localhost/console/_wfxml/default bpm_server2 0K Cancel		
Interctions PDA1 of 1-2		27		Converse P 2010 EULITEU UNITED

Select Server Connection	ר דעור דעור דעור דעור דעור דעור דעור דעו
Select Server Connection	
 "Admin on Test Box" 	Select an application Select an application project or project contents. Application: Application: Select an application project or project contents. Image: Constant state
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Creating Users and Groups	FUĴÎTSU
 Prior to executing a Business Process ensure all roles exist of server 	on the
Business Process "Apply General Loan" needs these roles	
Loan Agent	
Loan Officer	
Customer Service	
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FUĴĨTSU Create Roles (groups) Select "System Administration" Tab Select Groups Click "New Group" System Administration DashBoard Tasks Analytics Community Process Management • Groups 🗙 🔏 Users 📇 Groups 0 Groups 🍫 Login Sessions 8 New Group 🛠 Application Settings System Configurations Local Groups External Groups 🔊 Server/Console 3GroupsFound 🛭 🖕 1/1 🔿 Log Configuration Description Name 📔 Skins AdminRole IBPM internal group 🛅 Logs Test Role make tesing easie Role Submission Role Interstage BPM v11.2

FUjitsu Group Details Enter Group Details Name Description New Group 0 🗙 Name * Description Users Available Users Search Assigned Users » ^ < Groups Available Groups Search Assigned Groups 🔚 Save 🛛 Save & Add Another 🛛 Cancel Interstage BPM v11.2 Copyright © 2010 FUJITSU LIMITED

Loan	ı Exam	iple Grou	ıps (role	es)	FUĴĨTSU
■ Gro	oups req	uired for Lo	an examp	le	
	Groups 🗶				
	Local Groups 6 Groups Fou	External Groups			New Group & Delete Group
	Name			Description	
	AdminRole			IBPM internal group	
	Customer Servi	ce		Apply General Loan	
	Loan Agent			Apply General Loan	
	Loan Officer			Apply General Loan	
	Role			Test Role make tesing easier	
	Submission Rol	3	-		
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Adding Users Select Users Tab Click New User

	Groups 🗶 Users 🗶			
	Local Users		0	
			& New User & Delete User	
	Local Users			
	1 Users Found			
	▲User Id	Name	Email	
	ibpm_server2	ibpm_server2		
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Enter Us	ser Detail	S	FUĴÎTSU
Enter Us	ser Id, Passw	ord (min 8 chars and 1 numeric)	
Assign G	Group		
	New User		0 ×
	User Id * Email Address Password * Confirm Password * Email Notification Groups	ueer1 ••••• (Minimum 8 chars, must contain at least 1 num ••••• This will allow users to get email notifications and complete their tasks by Em Available Groups Image: Search and the search of the sear	ber) ail.
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Loan Example Users

Users required for Loan example

- user1 Loan Agent Role
- user2 Loan Officer Role
- user3 Customer Service Role

Local Users		
4 Users Found		
User Id	Name	Email
ibpm_server2	ibpm_server2	
user1	user1	
user2	user2	
user3	user3	

Start Bank Loan Application							
 Start L Initial S Click S⁴ 	oan_Business State is <i>Offline</i> tart Button to	_Processes Wo change to Onli	rkflow App ne State	plication			
	Ald BankLoanSample ExtBPM Loan_Business_Processes System Application : BankLoanSam	Name BankLoanSample ExtIBPM Loan_Business_Processes System tple	Owner Group AdminRole AdminRole AdminRole	State Online Online Offine Online Online			
Details Settings Variable Access URL http://192.168.172.128:80/console/default/BankLoanSample/getDashboard.page State Online Name BankLoanSample Description							
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Process Definitions

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FUJITSU **Process Definitions** Select Process Definitions Tab Business Process Definition List Application * History * Favorites* Help Preferen es Log Ou *Sinterstage* Loan_Business_Processes Console Welcome ibpm_server2 FUJ DashBoard Tasks Analytics Community Process Managemen System Administration My Processes Process Definitions 🛃 My Processes 👕 Process Defin Process Definition List 0 🛐 PI Searches 🕞 Open 🗟 Create New 🔄 Import 🥝 Download 🖻 Archived List 🔄 Refresh PD Searches **^ld** 2535 Ve: Owner ibpm_server2 Draft Apply General Loan Process Definition Details 🜖 Show in Full Screen Refresh Summary BPMN Details Process Instance List ର୍ ର୍ 🔛 🖾 Apply General Loar Start Start Loan Agent Enter Loan App 0 Interstage BPM v11.2 Copyright © 2010 FUJITSU LIMITED

Start Process Definition



- Start (execute) "Apply General Loan" Process Definition
- Right-Click on Process Definition
- Click Instant Start

My Processe Process Defi	Process	Definitions 🛛	<u>e New</u> 📑 In	nport 🕘 Down	load 🗄 Archiv	ed List 🖏 Refresh
Process Defin Ar Instant S Constant S Property Sector Property Sector	nition Name	Process Instance	►ld 2535 III List	Version 1.0	State Draft Show in Fi	Owner ibpm_server2
	~					







Performing Work - Details

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

					Show in Full	Screen
	Summary Deta	s Reports	Sub Task Details	Jump	o -Select One-	-
-						
	- Form					
	Default					
	Derault					1
	firstName			*		
	lastName			*		
				*		
	address			*		
	loan/Amt	0.00	also			
	personal		aise	*		
	reason			*		
	Save					
DDM u11 2					Com	
erstage BPIVI VII.2				47	Cop	yright © 20

Performing Work – Details	FUĴĨTSU
 Make Choice – Submit Loan Application 	
Comments	Back to top Back to top Back to top Back to top
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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.

	Loan Officer Review Loan Rejected Customer Ser Mail Rejection		
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Process Definition - Version and State

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Dashboard Tasks Analytics Community Process Definitions B Version State Image: State Process Definition List Process Definition List Image: State Process Definition List Image: State Image: State Process Definition List Image: State Image: State Process Definition List Image: State Image: State Image: State Image: State	Ginterstage BankLog	nSample Console	Applic	ation 🔹 History	Favorites Welcome #	Help Preferences Log Out Administrator FUJITSU	-
2 Do Fond Process Definition liame Bank Lang Business_Vew 10 Daft administrator Bank Lang Business_Vew 10 Daft administrator Bank Lang Business_Vew 10 Daft Bank Lang Business_Vew 10 Daft administrator Bank Lang Business_Vew 10 Bank Lang Business Summary Bank Lang	Dashboard Tasks Anal	ytics Community Process Management My Process Process Definitions Process Definition List Do Open Creat	Vers	sion	State	System Administration	
Summary BPIM Details Process Instance List		2 PD Found Process Definition Name BankLoan Bank Loan Bank Loan Userses_Vew I Process Definition Details	▼id 80 15	Version 1.0 1.0	State Draft Draft	Owner administrator administrator	
		Summary BPNN Details Process Instance	e List				
		BankLean Submission Submission Submission Submission					¥

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.

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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

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Role Resolution





Performing Work

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

			Show in Full Screen
	Summary Details Rep	orts Sub Task Details	
	Details		
	Status	Active	
	From	ibpm_server2	
	То	user1	
	Date	Thu Mar 11 16:31:53 EST 2010	
	Process Instance	Apply General Loan	
	Due Date		
	Priority	Business Process for applying for	
	Save Accept	Reassign 2 Decline USuppend	ne GAdd a Subtask Recall
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Work Item Operations

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- 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.

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Reassign Task



- 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

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Reas	sign Task			FUĴÎTSU
Rea	assign Task to	group or a sp	ecific user(s)	
	Task Assign Users:		0	
	Available Groups AdminRole ClosingRole CreditRole Customer Service Loan Agent Loan Agent Loan Agent Role Role SubmissionRole	Available Users	Assigned Users ibpm_server2 user1 ibm_server2 iser1 Cancel	
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Work Item States



- Read has been viewed by the current user
- Accepted accepted by the current user and therefore unavailable (inactive) to other users in that role

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- 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





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