



Red Hat Process Automation Manager 7.1

Getting started with business processes

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Red Hat Customer Content Services
brms-docs@redhat.com

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Abstract

In this tutorial, you will create and test a mortgage application scenario using Red Hat Process Automation Manager 7.1. The procedures in this document are based on the included Mortgage Process sample project.

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PREFACE

As a citizen developer who wants to build rule-based solutions quickly, you can use Business Central in Red Hat Process Automation Manager to design a variety of business processes. A business process is a graph that describes the order in which a series of steps must be executed using a flow chart. A process consists of a collection of predefined node types that are linked to each other using connections. Each of the nodes represents one step in the overall process while the connections specify how to transition from one node to the other.

Prerequisites

- Red Hat JBoss Enterprise Application Platform 7.1.0 is installed. For installation information, see the [Red Hat JBoss EAP 7.1.0 Installation Guide](#).
- Red Hat Process Automation Manager is installed and configured with Process Server. For more information, see [Installing and configuring Red Hat Process Automation Manager on Red Hat JBoss EAP 7.1](#).
- Red Hat Process Automation Manager is running and you can log in to Business Central with the **developer** role. For more information, see [Planning a Red Hat Process Automation Manager installation](#).

CHAPTER 1. OVERVIEW

Red Hat Process Automation Manager enables you to automate your business processes and decisions. For example, a bank offers a housing mortgage loan service. When a customer wants to buy a new property using credit, they contact a broker at the bank who assists in filing for a mortgage loan. The broker collects information about the property and the customer, such as the salary of the customer, social security number, the property sale price, and the requested loan amount. The broker then submits a request on behalf of the customer.

Using Red Hat Process Automation Manager, the housing mortgage department of the bank creates a complete business process for the mortgage loan. Whenever a customer submits a request, a new process instance is created. This ensures consistency in the quality of evaluating each request, provides complete visibility into the status of each request, and makes the process efficient and effective.

CHAPTER 2. MIGRATING BUSINESS PROCESSES FROM NEW TO LEGACY PROCESS DESIGNER

You can migrate a business process from the new process designer in Business Central to the legacy process designer. By default, all business processes open in the new process designer. But once you migrate a business process, it will always open in the legacy designer.



NOTE

Migrating business processes is an irreversible process.

Procedure

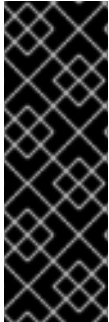
1. Log in to Business Central and go to **Menu → Projects**.
2. From **Assets** tab, select the business process. It will open in the new process designer.
3. Click **Migrate** and a warning will appear.
4. Click **Migrate Diagram**.
The process designer will restart and the business process will re-open in the legacy process designer.

Migrating a business process will result in two changes:

- The name of the business process in the process designer will change, for example,
 - Name in new process designer: business-process-name.bpmn - Business Processes
 - Name in legacy process designer: business-process-name.bpmn2 - Business Processes (legacy)
- The extension of the business process will change from *.bpmn to *.bpmn2.

CHAPTER 3. OPENING THE MORTGAGE PROCESS SAMPLE PROJECT

The **Mortgage Process** sample project consists of predefined data objects, guided decision tables, guided rules, forms, and a business process. Using the sample project provides a quick way to get acclimated with Red Hat Process Automation Manager. In a real business scenario, you would create all of the assets by providing data that is specific to your business requirements.




IMPORTANT

The business process application example includes features that are Technology Preview only. Technology Preview features are not supported with Red Hat production service level agreements (SLAs), might not be functionally complete, and are not recommended for production. These features provide early access to upcoming product features, enabling customers to test functionality and provide feedback during the development process. For more information about Red Hat Technology Preview support, see [Technology Preview Features Support Scope](#).

Procedure

Navigate to the Mortgage Process sample project to view the predefined assets.

1. Log in to Business Central and click **Menu** → **Design** → **Projects**.
2. Click  in the upper-right corner of the screen and select **Try Samples**.
3. Select **Mortgage Process** and click **Ok**.

The **Assets** view of the project opens.

CHAPTER 4. DATA OBJECTS

Data objects are the building blocks for the rule assets that you create. Data objects are custom data types implemented as Java objects in specified packages of your project. For example, you might create a **Person** object with data fields **Name**, **Address**, and **DateOfBirth** to specify personal details for loan application rules. These custom data types determine what data your assets and your decision services are based on.

For more information about creating data objects, see "[Creating data objects](#)" in *Designing a decision service using guided decision tables*.

4.1. VIEWING THE MORTGAGE PROCESS DATA OBJECTS

This tutorial utilizes the predefined data objects in the **Mortgage Process** sample project.

The **Mortgage Process** data model is composed of four data objects:

- **Applicant**
- **Bankruptcy**
- **IncomeSource**
- **LoanApplication**

4.1.1. Viewing the Applicant data object

Follow these steps to familiarize yourself with the predefined **Applicant** data object.

Procedure

1. Click **Menu** → **Design** → **Projects**, then click **Mortgage Process**.
2. Input **Applicant.java** in to the project's asset search box and click the **Applicant** data object.
3. Review the **Applicant** data object fields.

The screenshot shows the 'Applicant.java - Data Objects' interface. It has three tabs: 'Model' (selected), 'Overview', and 'Source'. Below the tabs, the word 'Applicant' is displayed in blue, followed by a '+ add field' button. A table lists the fields of the Applicant data object:

Identifier	Label	Type	
age		Integer	Delete
applicationDate		Date	Delete
approved		Boolean	Delete
creditRating		String	Delete
name		String	Delete

4.1.2. Viewing the Bankruptcy data object

Follow these steps to familiarize yourself with the predefined **Bankruptcy** data object.

Procedure

1. Click **Menu** → **Design** → **Projects**, then click **Mortgage Process**.
2. Input **Bankruptcy.java** in to the project's asset search box and click the **Bankruptcy** data object.
3. Review the **Bankruptcy** data object fields.

Bankruptcy.java - Data Objects ▾

Model Overview Source

Bankruptcy + add field

Identifier	Label	Type	
amountOwed		Integer	Delete
yearOfOccurrence		Integer	Delete

4.1.3. Viewing the IncomeSource data object

Follow these steps to familiarize yourself with the predefined **IncomeSource** data object.

Procedure

1. Click **Menu** → **Design** → **Projects**, then click **Mortgage Process**.
2. Input **IncomeSource.java** in to the project's asset search box and click the **IncomeSource** data object.
3. Review the **IncomeSource** data object fields.

IncomeSource.java - Data Objects ▾

Model Overview Source

IncomeSource + add field

Identifier	Label	Type	
amount		Integer	Delete
type		String	Delete

4.1.4. Viewing the LoanApplication data object

Follow these steps to familiarize yourself with the predefined **LoanApplication** data object.

Procedure

1. Click **Menu** → **Design** → **Projects**, then click **Mortgage Process**.
2. Input **LoanApplication.java** in to the project's asset search box and click the **LoanApplication** data object.
3. Review the **LoanApplication** data object fields.

LoanApplication.java - Data Objects ▾

[Model](#) [Overview](#) [Source](#)

LoanApplication + add field

Identifier	Label	Type	
amount		Integer	Delete
approved		Boolean	Delete
approvedRate		Integer	Delete
deposit		Integer	Delete
explanation		String	Delete
insuranceCost		Integer	Delete
lengthYears		Integer	Delete

CHAPTER 5. CREATING THE MORTGAGEAPPROVALPROCESS BUSINESS PROCESS

A business process is a graph that describes the order in which a series of steps must be executed using a flow chart. A business process consists of a collection of nodes that are linked to each other using connections. Each of the nodes represents one step in the overall process while the connections specify how to transition from one node to the other.

The **Mortgage Process** sample project contains a predefined **MortgageApprovalProcess** business process. For this tutorial, you will delete the existing **MortgageApprovalProcess** business process and recreate it to gain a better understanding of creating a business process.

5.1. DELETE THE EXISTING BUSINESS PROCESS

Procedure

You must delete the sample business process before you can create your own.



Procedure

1. Log in to Business Central and click **Menu** → **Design** → **Projects**, then click **Mortgage Process**.
2. Input **MortgageApprovalProcess.bpmn** in to the project's asset search box and click on the **MortgageApprovalProcess** business process.
3. Select **Delete** from the toolbar, then click **Delete** to confirm that you want to delete this asset.

5.1.1. Validating the mortgage

The mortgage validation business process determines whether or not the new application contains the required data before proceeding. If all of the specified data requirements are met, the application will move on to the mortgage calculation business process.

Procedure

1. Log in to Business Central and click **Menu** → **Design** → **Projects**, then click **Mortgage Process**.
2. Click **Add Asset** → **Business Process**.
3. Enter the following values:
 - **Business Process:** **MortgageApprovalProcess**
 - **Package:** Select **com.myspace.mortgage_app**
4. Click **Ok**. The diagram editor opens.
5. In the upper-right corner, click the **Diagram properties**  icon.
6. Scroll down and expand **Process Data** and click  in the **Process Variables** section.
7. Enter the following values:

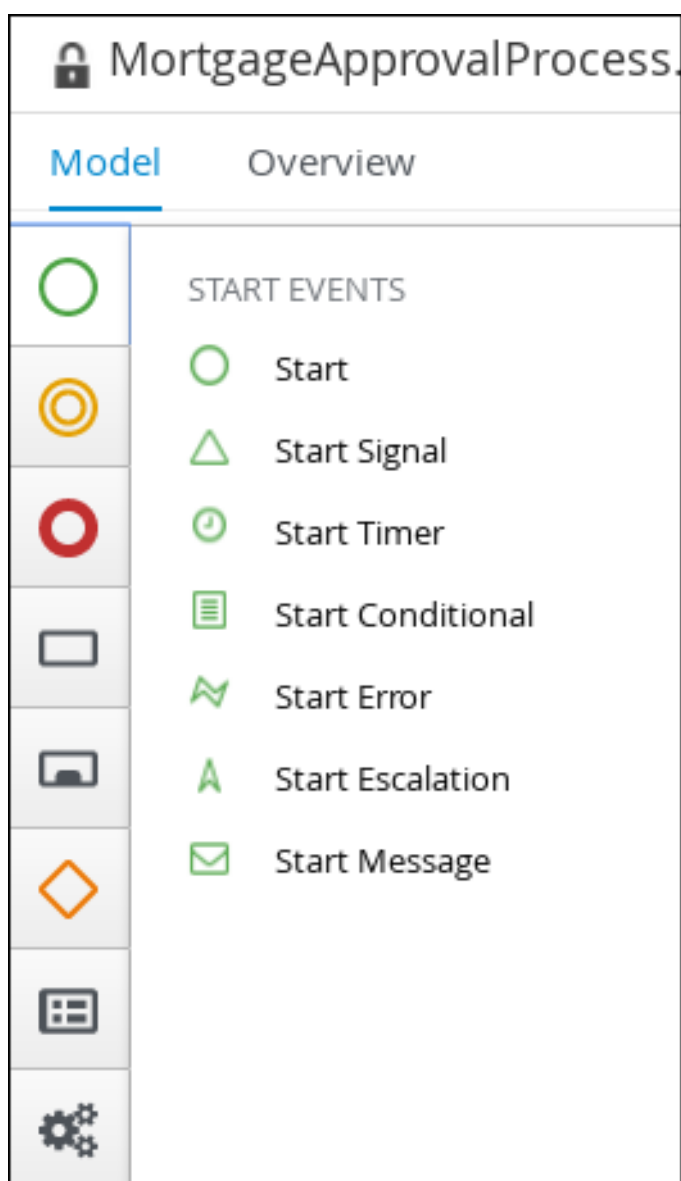
- Name: **application**.
- Data Type: **Application [com.myspace.mortgage_app]**

8. Click **Save**, then **Save**, to confirm your changes.

5.1.2. Creating outgoing connections

This section describes how to create an outgoing connection from the start event to an exclusive gateway and then from the exclusive gateway to the business rule task. Exclusive gateways are used to make decisions and react to events based on the available data. A business rule task represents a set of rules that must be evaluated.

Red Hat Process Automation Manager contains a predefined selection of node types to simplify business process creation. The predefined node panel is located on the left side of the diagram editor. Click on the various node icons to reveal the available options as shown here.

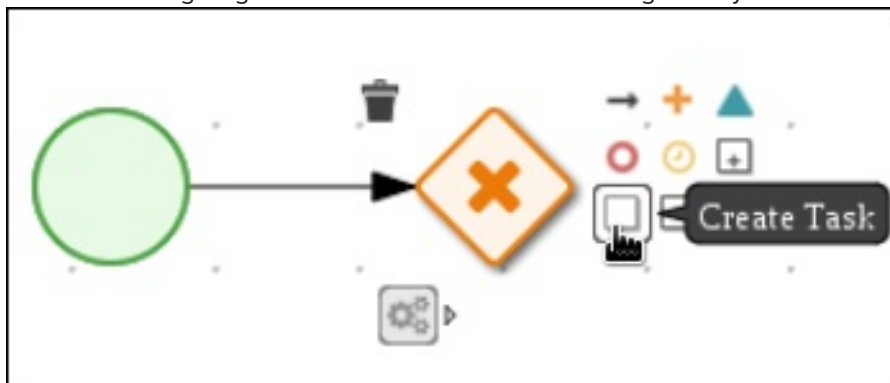


Procedure

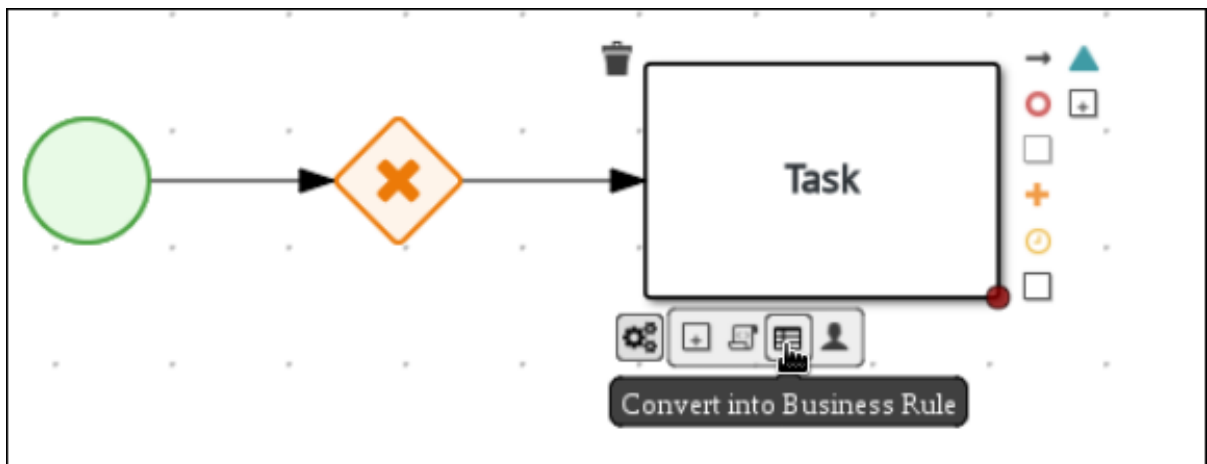
1. Click on the start event and create an outgoing connection from the start event to an exclusive gateway.



2. Create an outgoing connection from the exclusive gateway to a task.




3. Convert the new task to a business rule task.



4. Click on the business rules task and enter **Validation** in the **Name** field of the **Diagram properties** panel.
5. Expand **Implementation/Execution**, select **validation** in the **Rule Flow Group** field.
6. Define the following Java expression in the **On Exit Action** field :

```
System.out.println(application.getProperty());
```

7. Scroll down and expand the **Data Assignments** section and click  next to **Assignments**.
8. In the **Validation Data I/O** window, click **Add** to create the following assignments:

Validation Data I/O x

Data Inputs and Assignments + Add

Name	Data Type	Source	
<input type="text" value="application"/>	Application [com.i ▼]	application ▼	🗑️

Data Outputs and Assignments + Add

Name	Data Type	Target	
<input type="text" value="application"/>	Application [com.i ▼]	application ▼	🗑️

9. Click **Save**.

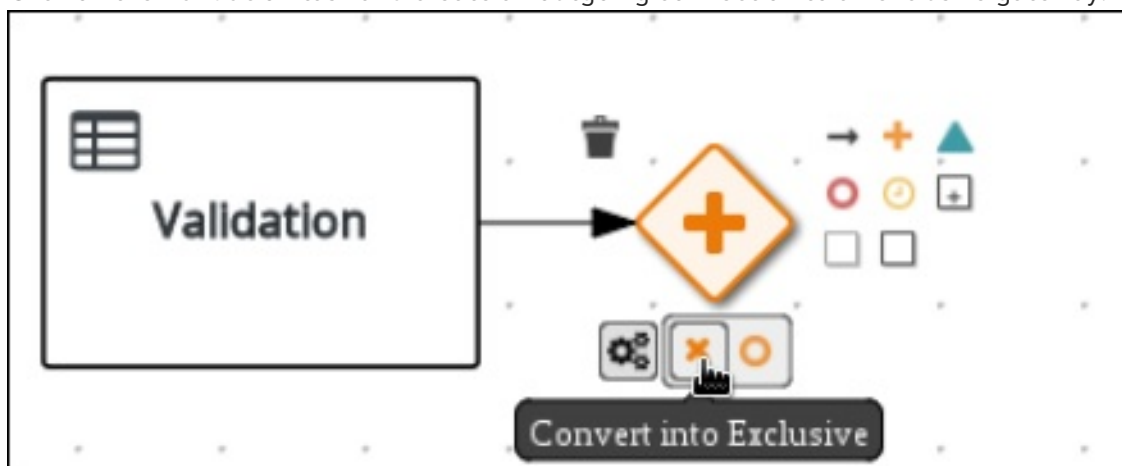
10. In the diagram editor, click **Save**, then **Save**, to confirm your changes.

5.1.3. Defining the validation data

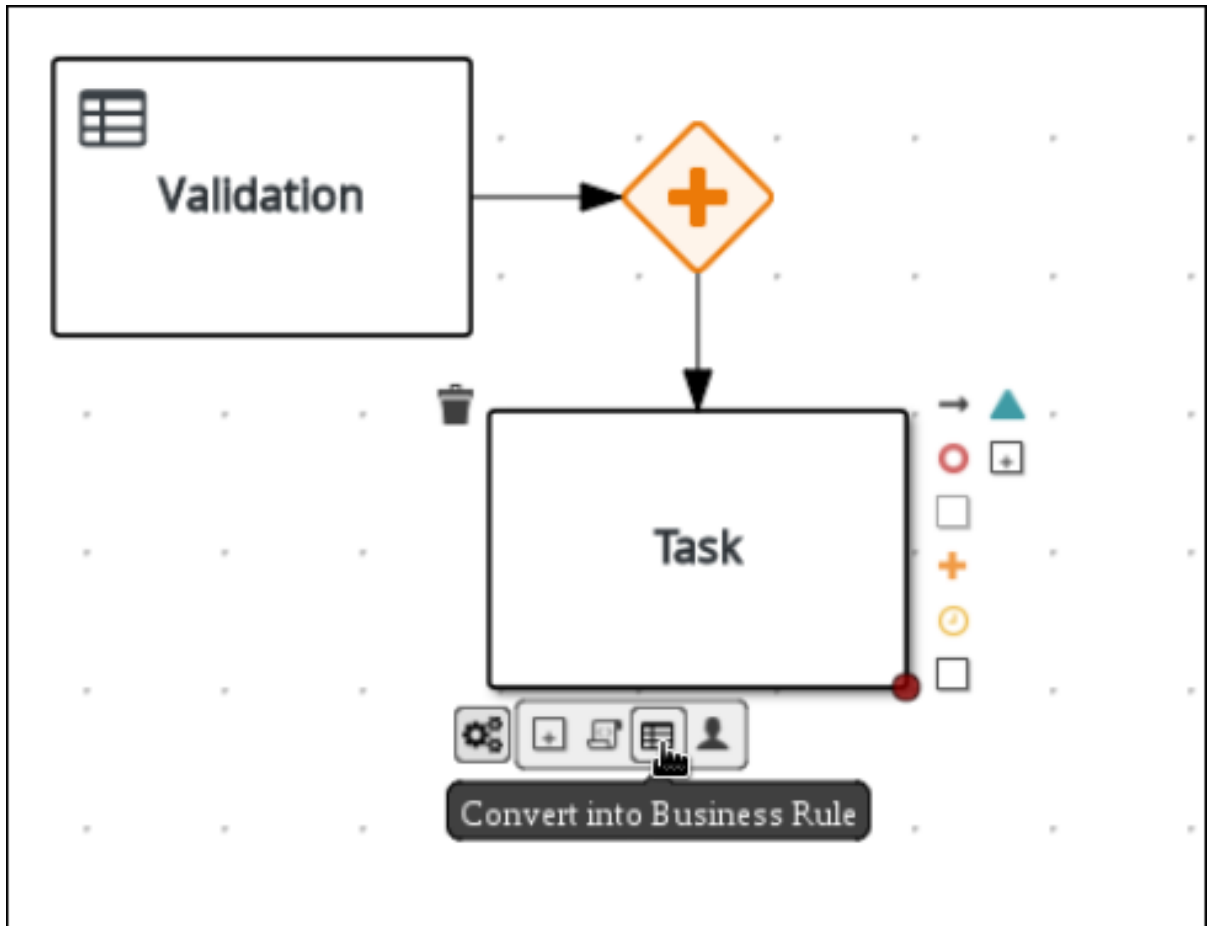
This section describes how to define the data that will determine whether the application data is correct or if there is an error or any missing information.

Procedure

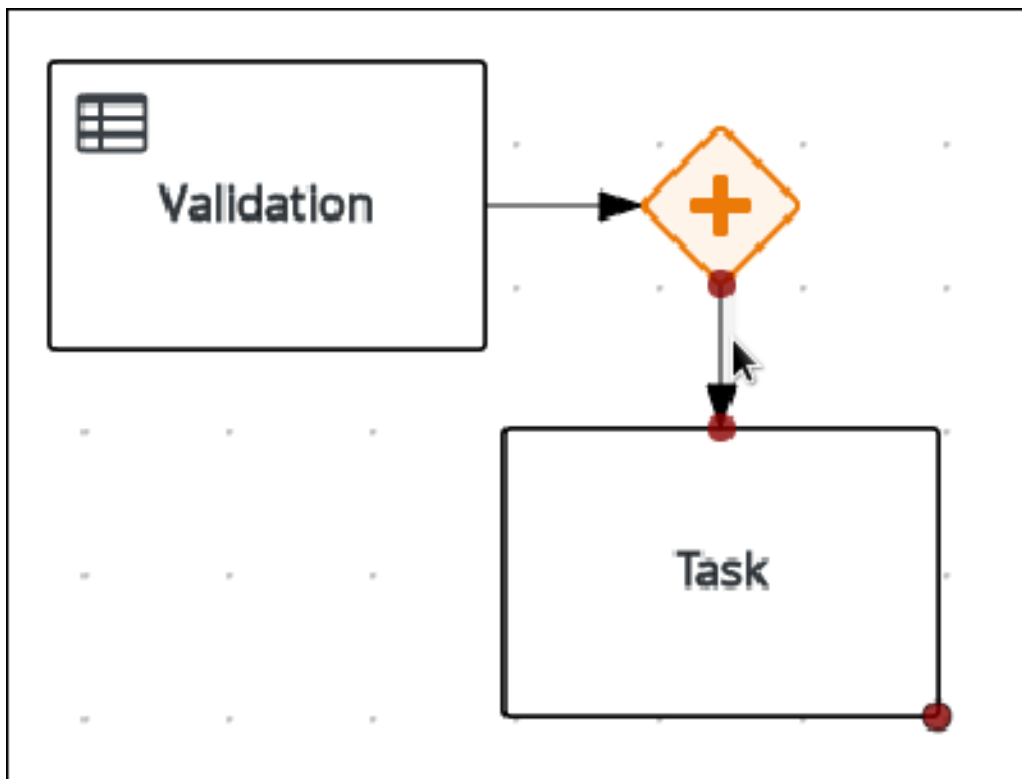
1. Click on the **Validation** task and create an outgoing connection to an exclusive gateway.



2. Create an outgoing connection from the exclusive gateway to a new business rule task.



3. Click the created connection.



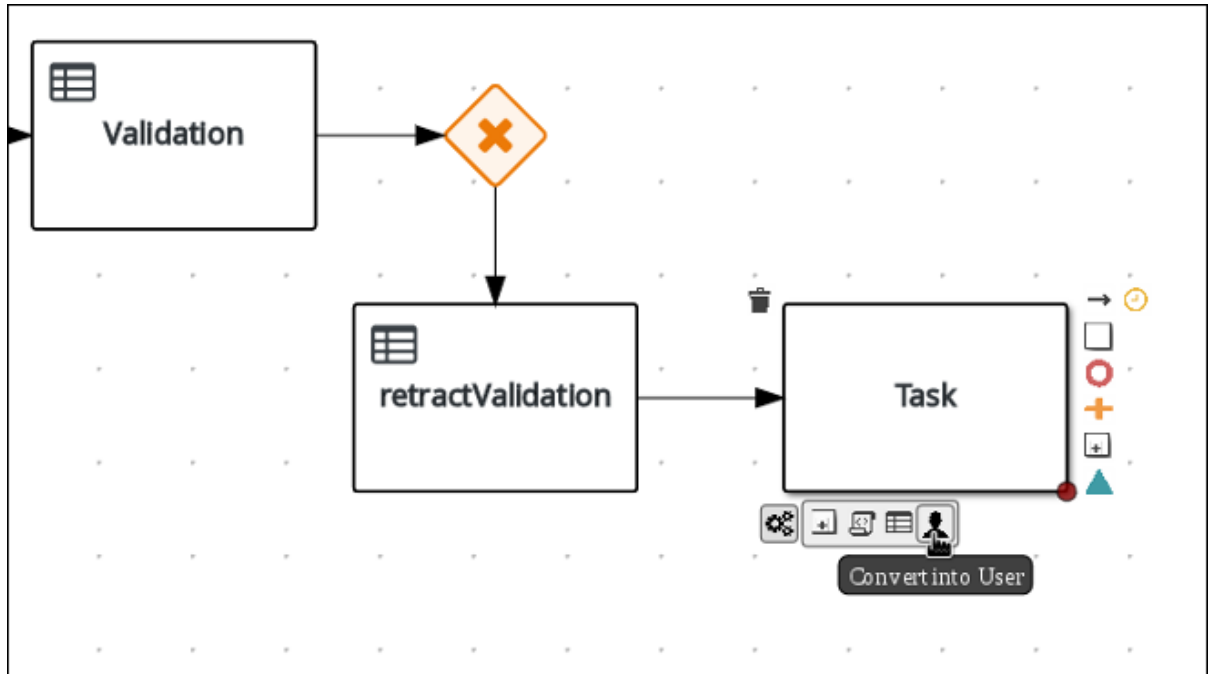
4. In the **Diagram Properties** panel, input **Invalid** in the **Name** field.


5. Expand **Implementation/Execution**, and enter the following Drools condition expression:

- **Condition Expression:** `ValidationErrorDO()`

- **Condition Expression Language: drools**

6. Click on the business rule task and enter **Retract Validation** in the **Name** field of the **Diagram properties** panel.
7. Expand **Implementation/Execution** and enter **error** in the **Rule Flow Group** field.
8. Create an outgoing connection from the **Retract Validation** task to a new user task.



9. Click the user task and in the **Diagram Properties** panel, input **Correct Data** in the **Name** field.
10. Expand **Implementation/Execution** and enter:
 - **Task Name: CorrectData**
 - **Groups: broker**
11. Click  next to **Assignments**. In the **Correct Data Data I/O** window, click **Add** to create the following assignments:
12. In the **Correct Data Data I/O** window, click **Add** to create the following assignments:

Correct Data Data I/O
✕

Data Inputs and Assignments + Add

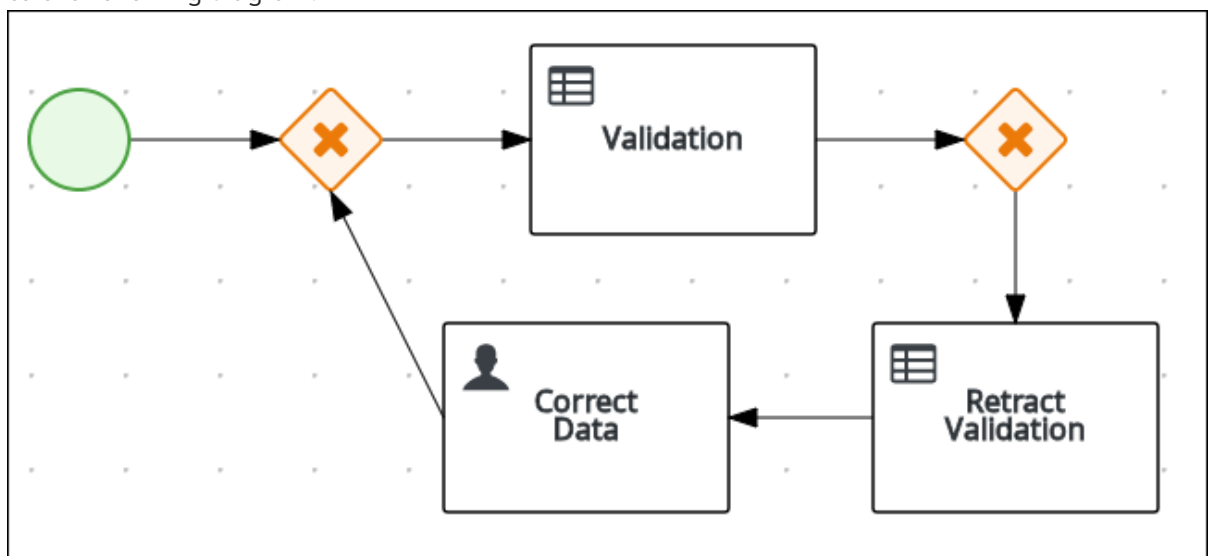
Name	Data Type	Source	
<input type="text" value="application"/>	Application [com.i ▼]	application ▼	✕

Data Outputs and Assignments + Add

Name	Data Type	Target	
<input type="text" value="application"/>	Application [com.i ▼]	application ▼	✕

Cancel Save

13. Click **Save**.
14. In the diagram editor, click **Save**, then **Save**, to confirm your changes.
15. Connect the **Correct Data** back to the first exclusive gateway. Your workflow should look similar to the following diagram:

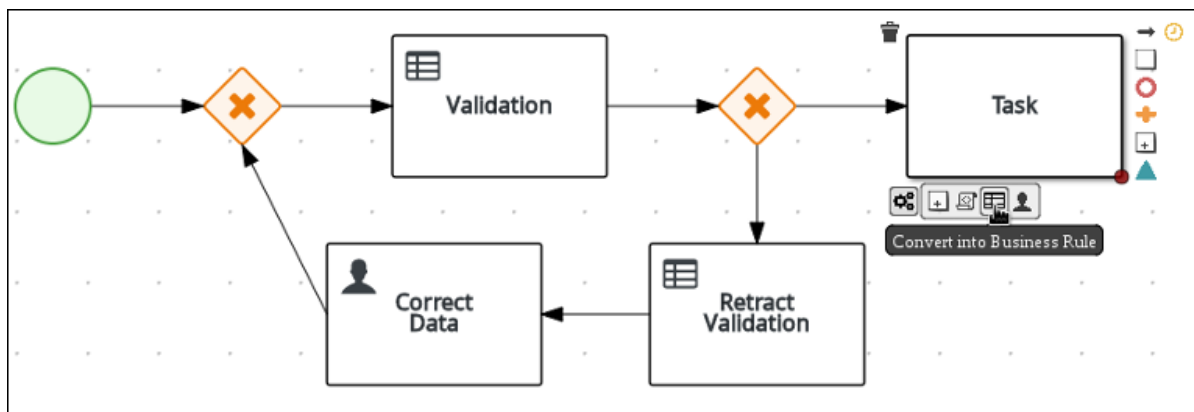



5.1.4. Calculating the mortgage

The mortgage calculation business process determines the applicant's mortgage borrowing limit.

Procedure

1. Return to the second exclusive gateway. Create an outgoing connection to a business rule task.



2. Click the created connection and in the **Diagram Properties** panel, input **Valid** in the **Name** field.
3. Expand **Implementation/Execution**, select and enter:
 - **Condition Expression: not ValidationError()**
 - **Condition Expression Language: drools**
4. Click the created business rule task and in the **Diagram Properties** panel, input **Mortgage Calculation** in the **Name** field.
5. Expand **Implementation/Execution**, select and enter **mortgagecalculation** in the **Rule Flow Group** field.
6. Click  next to **Assignments**. In the **Mortgage Calculation Data I/O** window, click **Add** to create the following assignments:

Mortgage Calculation Data I/O ✕


Data Inputs and Assignments + Add

Name	Data Type	Source	
application	Application [com.i ▼]	application ▼	✕

Data Outputs and Assignments + Add

Name	Data Type	Target	
application	Application [com.i ▼]	application ▼	✕

Cancel Save

7. Click **Save**.
8. Click on an empty space on the canvas, scroll down, expand **Process Data**, and click  next to **Process Variables**. Enter the following values:

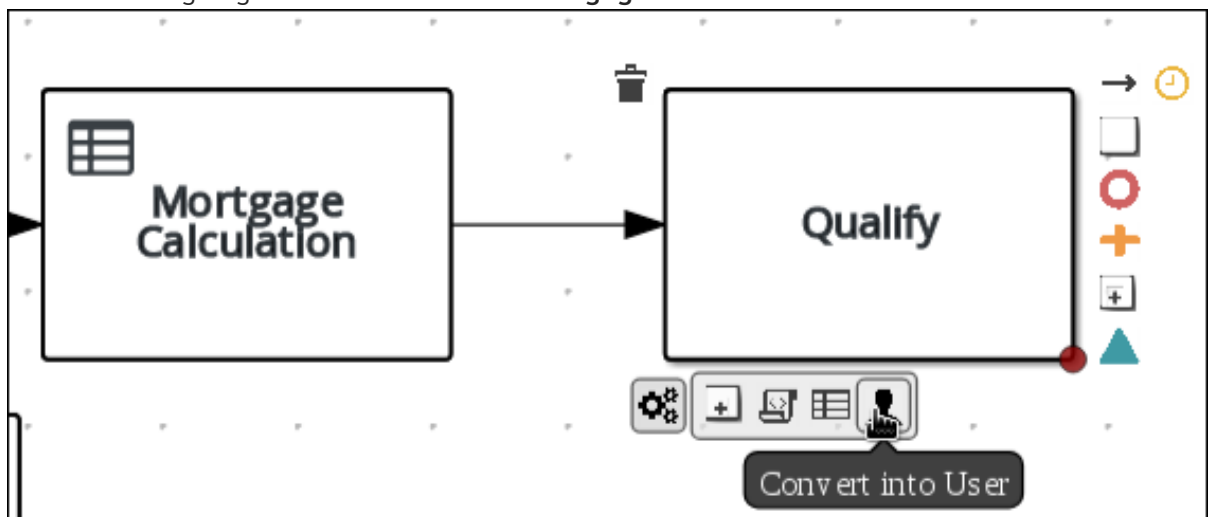
Process Data

Process Variables

Name	Data Type	
Application	Application ▼	+
inlimit	Boolean ▼	+


- Name: **inlimit**
- Date Type: **Boolean**

9. Create an outgoing connection from the **Mortgage Calculation** task to a user task.



10. Click on the user task and enter **Qualify** in the **Name** field.

11. Expand **Implementation/Execution** and enter:

- Task Name: **Qualify**
- Groups: **approver**
- Click  next to **Assignments**. In the **Qualify Data I/O** window, click **Add** to create the following assignments:

Qualify Data I/O
✕

Data Inputs and Assignments + Add

Name	Data Type	Source	
<input type="text" value="application"/>	Application [com.i ▼]	application ▼	✕

Data Outputs and Assignments + Add

Name	Data Type	Target	
<input type="text" value="inlimit"/>	Boolean ▼	inlimit ▼	✕

Cancel Save

12. Click **Save**. Above the canvas, click **Save**, then **Save**, to confirm your changes.
13. Create an outgoing connection from the **Qualify** task to an exclusive gateway.
 - a. Click on the **GATEWAYS** icon in the node panel.
 - b. Click on **Exclusive** and drag it to the right of the **Qualify** task.
14. Create an outgoing connection from the exclusive gateway and connect it to a user task.
15. Click the connection, name it **in Limit** and define the following Java Condition expression:

```
return inlimit;
```

▼ **Implementation/Execution**

Priority

Condition Expression


```
return inlimit;
```

//

java ▼



16. Click the user task and define:

- **Name: Final Approval**
- **Task Name: finalapproval**
- **Groups: manager**

17. Click  next to **Assignments**. In the **Final Approval Data I/O** window, click **Add** to create the following assignments:

Final Approval Data I/O ✕

Data Inputs and Assignments + Add

Name	Data Type	Source	
<input type="text" value="application"/>	Application [com.i ▼]	application ▼	
<input type="text" value="inlimit"/>	Boolean ▼	inlimit ▼	

Data Outputs and Assignments + Add

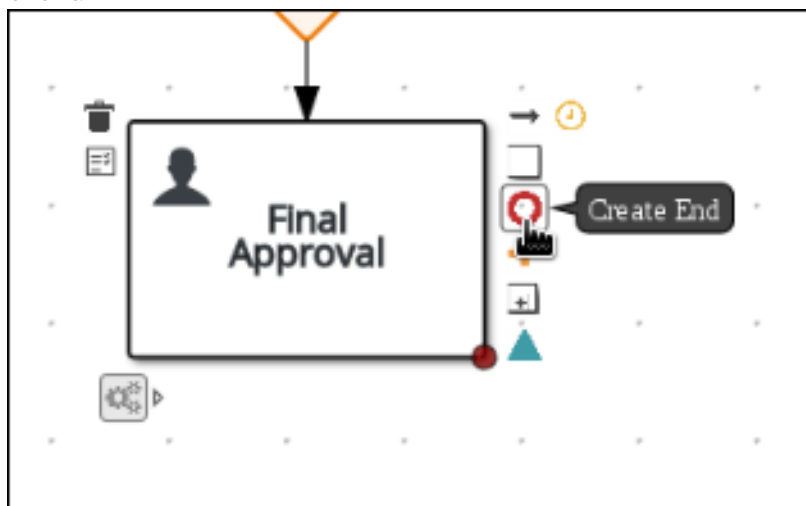
18. Click **Save**. Above the canvas, click **Save**, then **Save**, to confirm your changes.

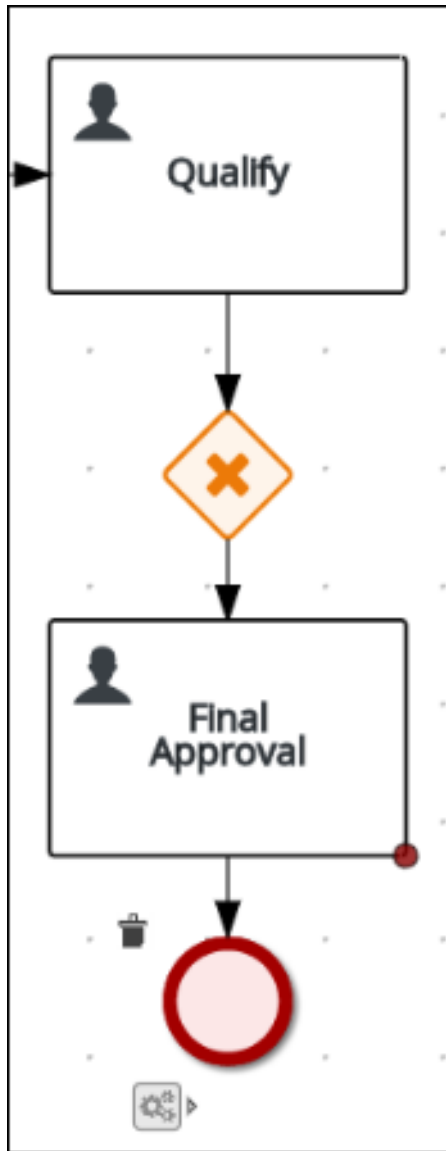
5.1.5. Increasing the down payment

The increasing the down payment business process checks to see if the applicant qualifies for the loan by increasing their down payment. The final result will be either the final loan approval, or loan denial based on the applicant's inability to increase the down payment.

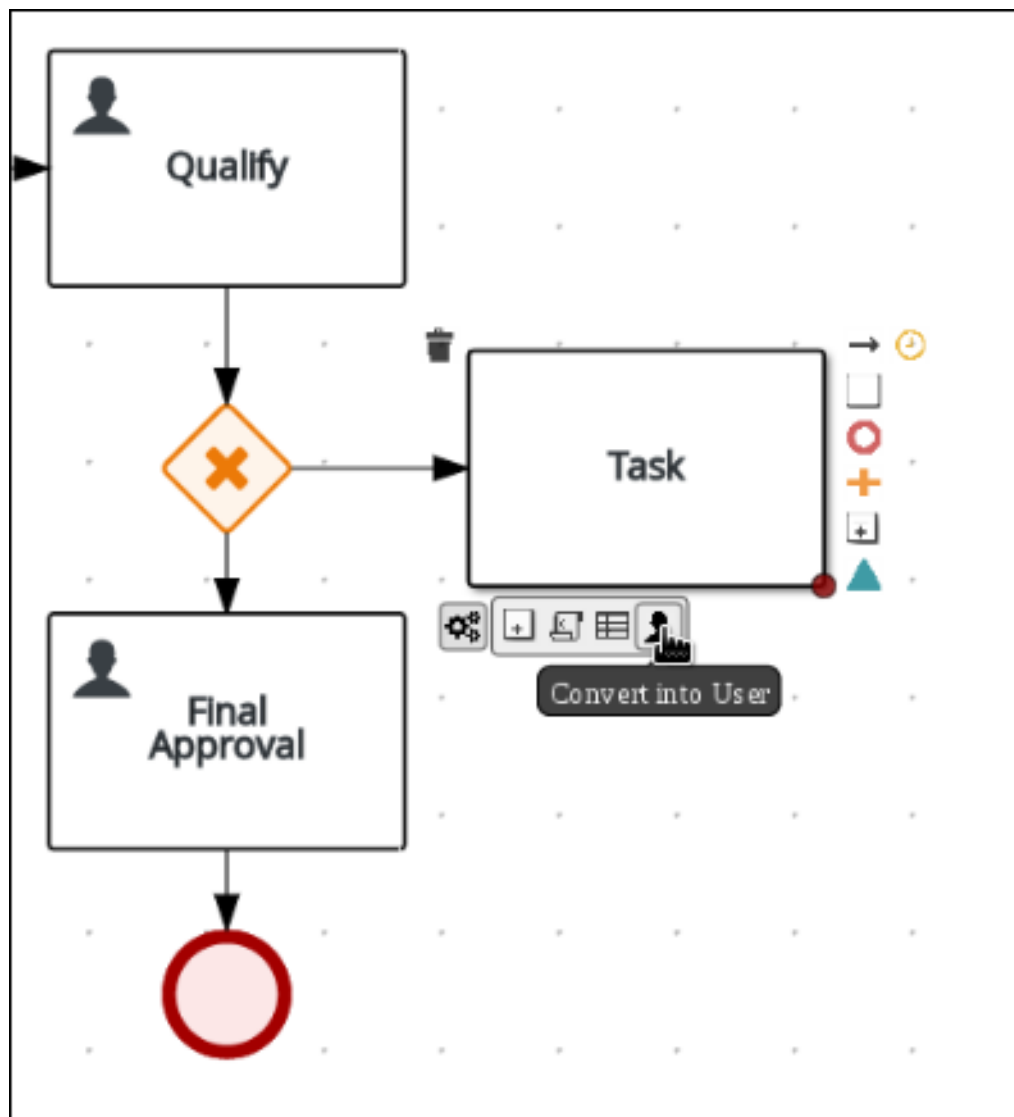
Procedure

1. Create an outgoing connection from the **Final Approval** user task and connect it to an end event.



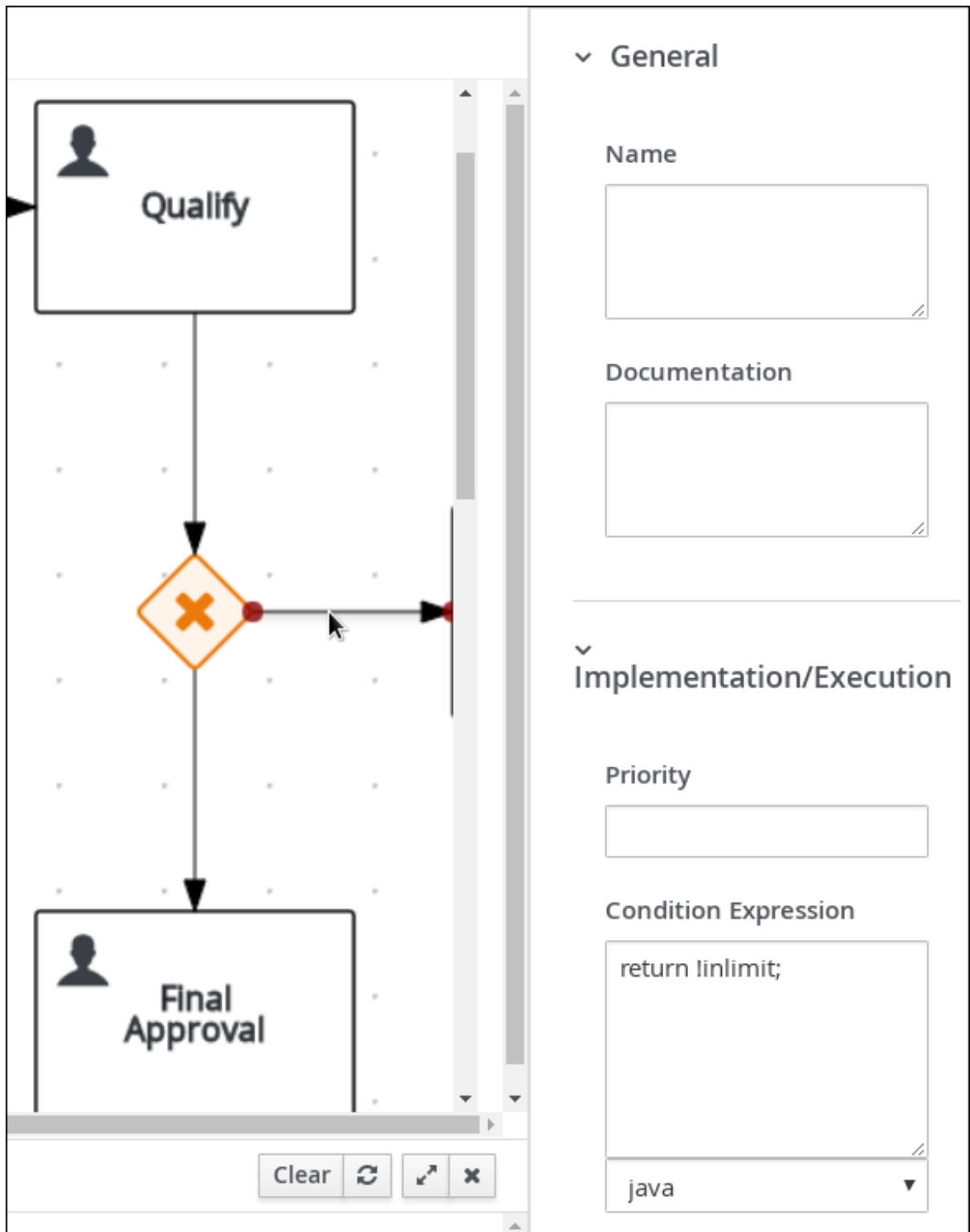



2. Return to the exclusive gateway that connects with the **Final Approval** user task. Create a second outgoing connection and connect it to a new user task.



3. Click the connection, name it **Not in Limit** and define the following Java expression:

```
return !inlimit;
```



4. Click on an empty space on the canvas, scroll down, expand **Process Data**, and click  next to **Process Variables**. Enter the following values:

- Name: **incdownpayment**
- Data Type: **Boolean**

Diagram properties

Name

Documentation

ID

Package

Version

Ad-Hoc


Process Instance Description

▼ **Process Data**

Process Variables

Name	Data Type	
<input type="text" value="Application"/>	Application [cor ▼	<input type="button" value="+"/> <input type="button" value="🗑"/>
<input type="text" value="inlimit"/>	Boolean ▼	<input type="button" value="🗑"/>
<input type="text" value="incdownpayment"/>	Boolean ▼	<input type="button" value="🗑"/>

5. Click the created user task and define:

- **Name: Increase Down Payment**
- **Task Name: incdown**
- **Groups: broker**
- Click  next to **Assignments**. In the **Increase Down Payment Data I/O** window, click **Add** to create the following assignments:

Increase Down Payment Data I/O ✕

Data Inputs and Assignments + Add

Name	Data Type	Source	
application	Application [com.i ▼]	application ▼	✕

Data Outputs and Assignments + Add

Name	Data Type	Target	
incdownpayment	Boolean ▼	incdownpayment ▼	✕

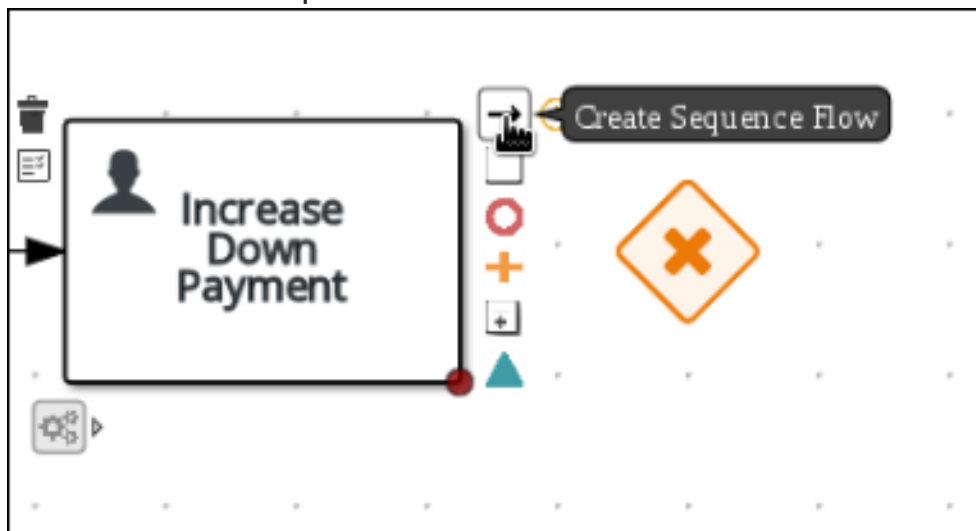
Cancel
Save

6. Click **Save**. Above the canvas, click **Save**, then **Save**, to confirm your changes.

7. Create an outgoing connection from the **Increase Down Payment** task to an exclusive gateway.

- Click on the **GATEWAYS** icon in the node panel.
- Click on **Exclusive** and drag it to the right of the **Increase Down Payment** task.

8. Click on the **Create Sequence Flow** icon to create a connection to the exclusive gateway.



9. Create an outgoing connection from the exclusive gateway and connect it to an end event. Then, click the connection, name it **Down payment not increased**, and create the following Java expression:

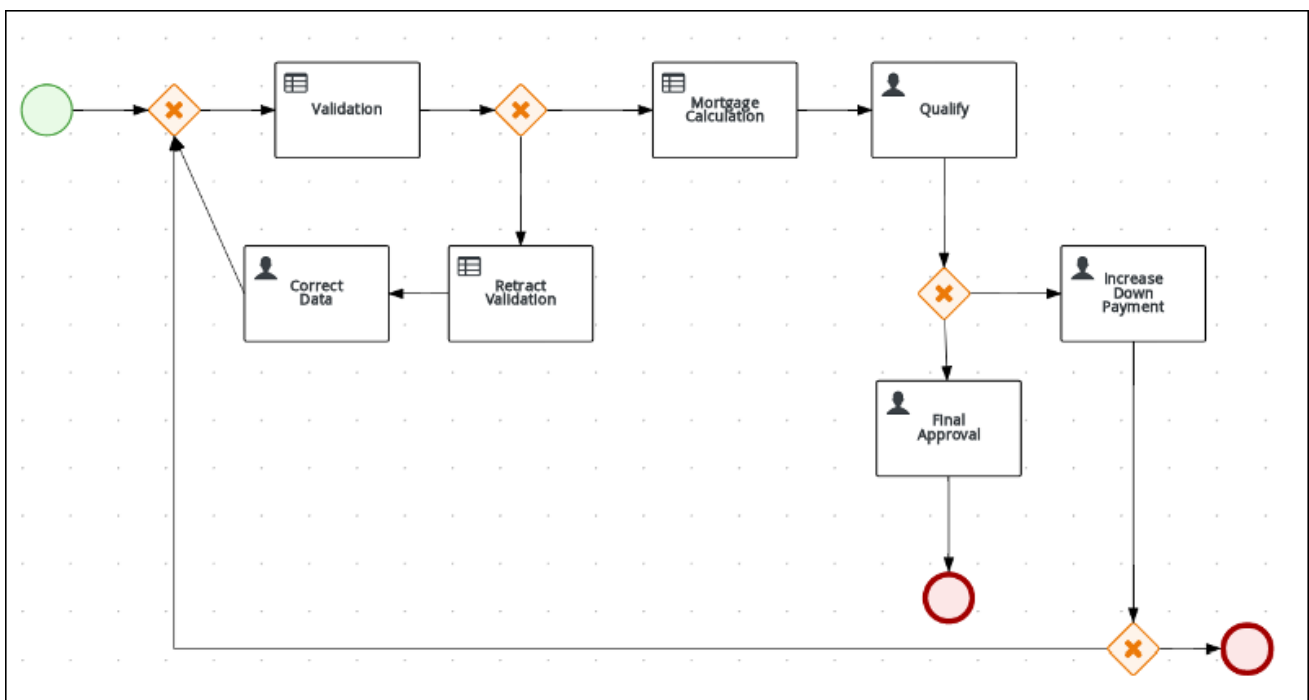
```
return lincdownpayment;
```

10. Create an outgoing connection from the exclusive gateway and connect it to the first exclusive gateway. Then, click the connection, name it **Down payment increased**, and create the following Java expression:

```
return incdownpayment;
```

11. Above the canvas, click **Save**, then **Save**, to confirm your changes.

The final version of the business process:



CHAPTER 6. GUIDED RULES

Guided rules are business rules that you create in a UI-based guided rules designer in Business Central that leads you through the rule-creation process. The guided rules designer provides fields and options for acceptable input based on the data objects for the rule being defined. The guided rules that you define are compiled into Drools Rule Language (DRL) rules as with all other rule assets.

All data objects related to a guided rule must be in the same project package as the guided rule. Assets in the same package are imported by default. After you create the necessary data objects and the guided rule, you can use the **Data Objects** tab of the guided rules designer to verify that all required data objects are listed or to import other existing data objects by adding a **New item**.

6.1. VIEWING THE MORTGAGE PROCESS BUSINESS RULES

Follow these steps to familiarize yourself with the predefined business rules for the **Mortgage Process** project.

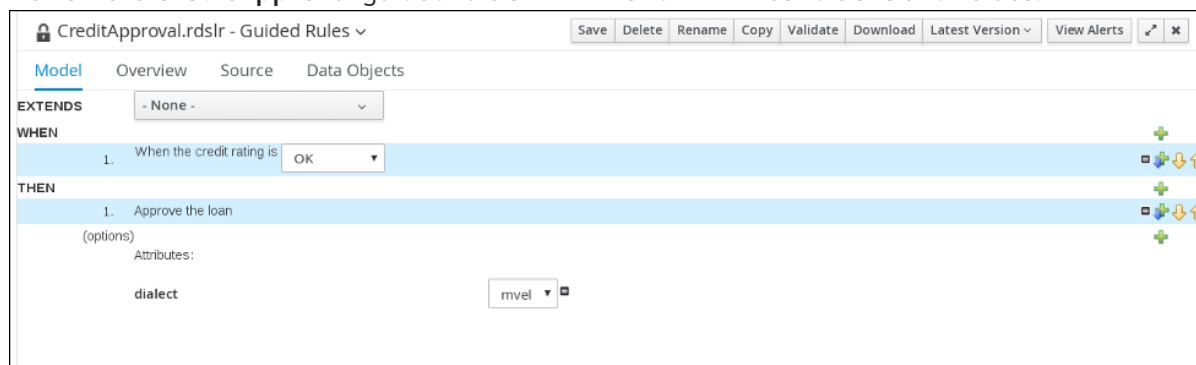
Related information

Business rules are defined using the Guided Rule wizard in Red Hat Process Automation Manager. For information about creating guided business rules, see [Designing a decision service using guided rules](#).

6.1.1. Viewing the CreditApproval guided rule

Procedure

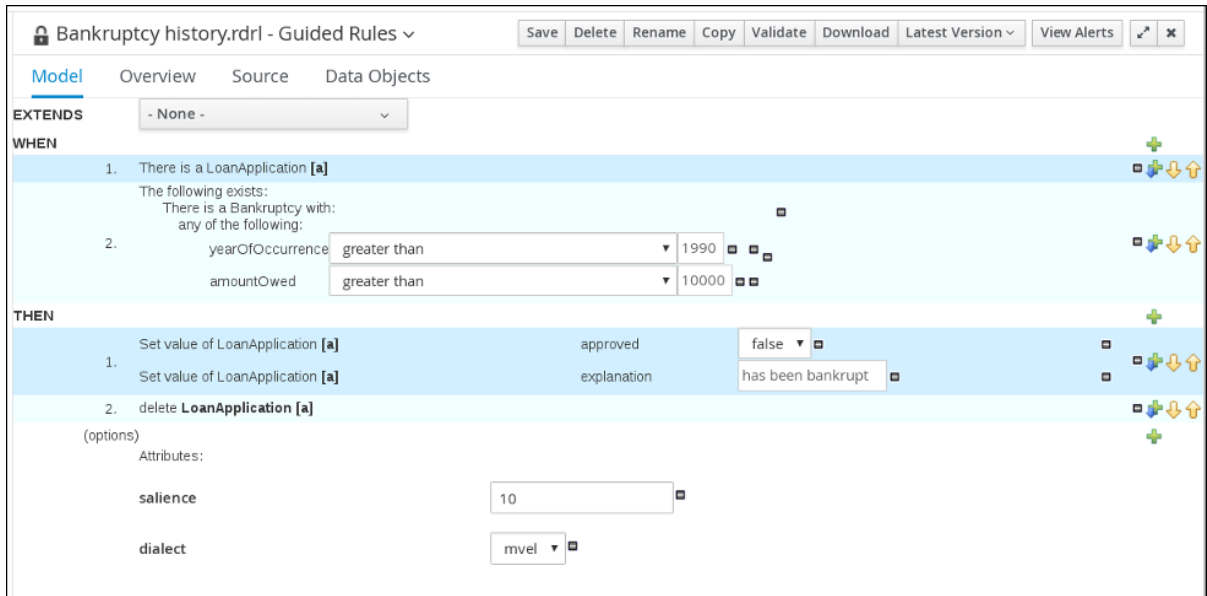
1. Click **Menu** → **Design** → **Projects**, then click **Mortgage Process**.
2. Click the **CreditApproval** guided rule.
3. Review the **CreditApproval** guided rule's **WHEN** and **THEN** conditions and values.



6.1.2. Viewing the Bankruptcy history guided rule

Procedure

1. Click **Menu** → **Design** → **Projects**, then click **Mortgage Process**.
2. Click the **Bankruptcy history** guided rule.
3. Review the **Bankruptcy history** guided rule's **WHEN** and **THEN** conditions and values.



Bankruptcy history.rdr1 - Guided Rules

Save Delete Rename Copy Validate Download Latest Version View Alerts

Model Overview Source Data Objects

EXTENDS - None -

WHEN

1. There is a LoanApplication [a]
2. The following exists:
 - There is a Bankruptcy with:
 - any of the following:
 - yearOfOccurrence greater than 1990
 - amountOwed greater than 10000

THEN

1. Set value of LoanApplication [a]
 - approved false
 - explanation has been bankrupt
2. delete LoanApplication [a]

(options)

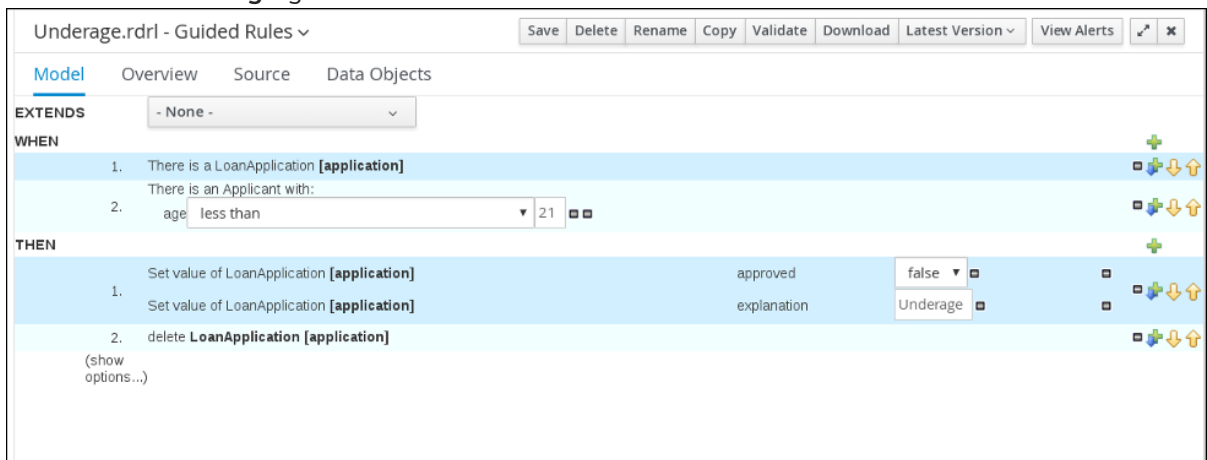
Attributes:

- salience 10
- dialect mvel

6.1.3. Viewing the Underage guided rule

Procedure

1. Click **Menu** → **Design** → **Projects**, then click **Mortgage Process**.
2. Click the **Underage** guided rule.
3. Review the **Underage** guided rule's **WHEN** and **THEN** conditions and values.



Underage.rdr1 - Guided Rules

Save Delete Rename Copy Validate Download Latest Version View Alerts

Model Overview Source Data Objects

EXTENDS - None -

WHEN

1. There is a LoanApplication [application]
2. There is an Applicant with:
 - age less than 21

THEN

1. Set value of LoanApplication [application]
 - approved false
 - explanation Underage
2. delete LoanApplication [application]

(show options...)

CHAPTER 7. GUIDED DECISION TABLES

Guided decision tables are a wizard-led alternative to uploaded decision table spreadsheets for defining business rules in a tabular format. With guided decision tables, you are led by a UI-based wizard in Business Central that helps you define rule attributes, metadata, conditions, and actions based on specified data objects in your project. After you create your guided decision tables, the rules you defined are compiled into Drools Rule Language (DRL) rules as with all other rule assets.

All data objects related to a guided decision table must be in the same project package as the guided decision table. Assets in the same package are imported by default. After you create the necessary data objects and the guided decision table, you can use the **Data Objects** tab of the guided decision tables designer to verify that all required data objects are listed or to import other existing data objects by adding a **New item**.

7.1. VIEWING THE PRICING LOANS DECISION TABLE

The goal of this chapter is to introduce you to the **Pricing loans** decision table. For this tutorial, you will not create and set the decision table conditions. Instead, review the values and the conditions that are already defined in the **Mortgage Process** sample project's **Pricing loans** Guided Decision Tables asset. For information about creating decision tables, see [Designing a decision service using guided decision tables](#).

Prerequisites

The business rules have been defined. For more information, see [Section 6.1, "Viewing the Mortgage Process business rules"](#).

Procedure

1. Log in to Business Central and click **Menu** → **Design** → **Projects**, then **Mortgage Process**.
2. Scroll down and click the **Pricing loans** Guided Decision Tables asset.

Pricing loans									
#	Description	application : LoanApplication				income : IncomeSource	application		
		amount min	amount max	period	deposit max	income	Loan approved	LMI	rate
1		131000	200000	30	20000	Asset	true	0	2
2		10000	100000	20	2000	Job	true	0	4
3		100001	130000	20	3000	Job	true	10	6

CHAPTER 8. GENERATING AND EDITING FORMS

The following chapter shows you how to automatically generate forms for collecting user data for your mortgage application business process. We have also included a bit more information about editing forms to familiarize you with Red Hat Process Automation Manager form manipulation.

Prerequisites

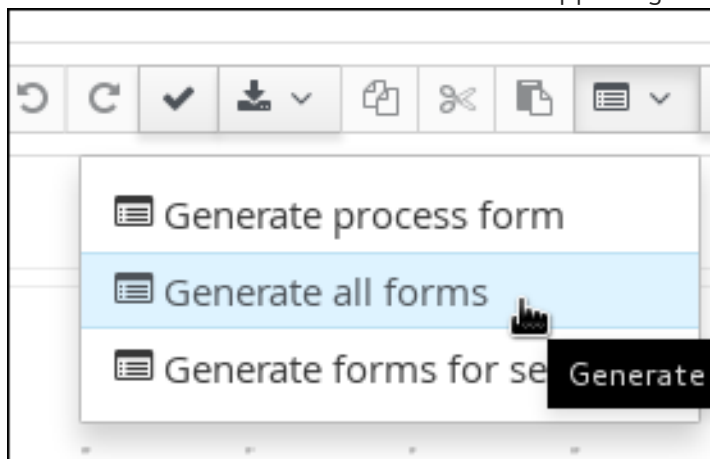
The business process model has been completed. For more information, see [Chapter 5, Creating the MortgageApprovalProcess business process](#).

8.1. AUTOMATIC FORM GENERATION

Red Hat Process Automation Manager enables you to automatically generate forms. For this business process you will automatically generate the **Applicant**, **Property**, and **Application** forms.

Procedure

1. Log in to Business Central and click **Menu** → **Design** → **Projects**, then **Mortgage Process**.
2. From the asset list, select the **MortgageApprovalProcess** business process.
3. Click on the **Form Generation** menu in the upper-right menu and select **Generate all forms**.



4. Click **Menu** → **Design** → **Projects**, then **Mortgage Process**.
5. From the asset list, select the **Applicant** form.
The **Applicant** form should look as follows:

The screenshot shows the 'Form Modeler [Applicant]' interface. At the top, there is a title bar with the text 'Form Modeler [Applicant]' and a menu bar with buttons for 'Save', 'Delete', 'Rename', 'Copy', 'Latest Version', and 'Hide Alerts'. Below the title bar, there are two tabs: 'Model' (selected) and 'Overview'. The main area displays three input fields stacked vertically. Each field has a label above it and a text input area below it. The first field is labeled 'Name' and contains the placeholder text 'Name'. The second field is labeled 'SSN' and contains the placeholder text 'SSN'. The third field is labeled 'Annual Income' and contains the placeholder text 'Annual Income'. Each field has a vertical ellipsis menu icon to its right.

6. Click **Menu** → **Design** → **Projects**, then **Mortgage Process**.
7. From the asset list, select the **Property** form. The **Property** form should look as follows:

The screenshot shows the 'Form Modeler [Property]' interface. At the top, there is a title bar with the text 'Form Modeler [Property]' and a menu bar with buttons for 'Save', 'Delete', 'Rename', 'Copy', 'Latest Version', and 'View Alerts'. Below the title bar, there are two tabs: 'Model' (selected) and 'Overview'. The main area displays four input fields stacked vertically. Each field has a label above it and a text input area below it. The first field is labeled 'Age of property' and contains the placeholder text 'Age of property'. The second field is labeled 'Address of property' and contains the placeholder text 'Address of property'. The third field is labeled 'Locale' and contains the placeholder text 'Locale'. The fourth field is labeled 'Sale Price' and contains the placeholder text 'Sale Price'. Each field has a vertical ellipsis menu icon to its right.

8. Click **Menu** → **Design** → **Projects**, then **Mortgage Process**.
9. From the asset list, select the **Application** form. The **Application** form should look as follows:

10. Click on the X in the upper-right corner to close the editor.

8.2. EDITING FORMS (OPTIONAL)

The following optional process shows you how to edit the Applicant form that you previously defined as part of this tutorial business process:

Procedure

1. Log in to Business Central and click **Menu** → **Design** → **Projects**, then **Mortgage Process**.
2. Click the **Applicant** data object form and add a new **Address** row.
 - a. Expand the **Form Controls** menu and drag the **TextBox** field in to the existing form.
 - b. Complete the form field properties for the new Address row.

Field properties

Field Type
TextBox

Label
Address

Placeholder
Adress

Max. Length
100

Required

Read Only

Validate on change field value

Help Message ⓘ

Field binding

+ Ok Cancel

3. Click the three vertical dots in the upper-right corner to edit or delete the row.
4. Click **Save**, then click **Save** to confirm your changes.


CHAPTER 9. DEPLOYING MORTGAGE PROCESS APPLICATION

The following chapter instructs you how to build and deploy a new instance of the **Mortgage Process** application in Red Hat Process Automation Manager.

Prerequisites

The Process Server is deployed and connected to the Business Central.

Procedure

1. Log in to Business Central and click **Menu → Design → Projects**.
2. Click on the project you want to deploy, for example **Mortgage Process**.
3. Click **Deploy**.
 - If there is no KIE container (deployment unit) with the project name, a container with default values is automatically created.
 - If an older version of the project is already deployed, go to the project settings and change the project version. When finished, save the change and click **Deploy**. This will deploy a new version of the same project with the latest changes in place, alongside the older version(s).
4. To verify the deployment, click **Menu → Manage → Process Definitions**, and click  .
5. Click on the three vertical dots in the **Actions** column and select **Start** to start a new instance of the process.

CHAPTER 10. EXECUTING THE MORTGAGE PROCESS

Now that you have deployed the project, you can execute the project's defined functionality. For this tutorial you will input data in to a mortgage application form acting as the mortgage broker. The `MortgageApprovalProcess` business process will run and will determine whether or not the applicant has offered an acceptable down payment based on the decision rules that you defined earlier. The business process will either end the rule testing or request that the applicant increase the down payment to proceed. If the application passes the business rule testing, the bank's approver will review the application and either approve or deny the loan.

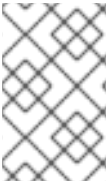
Prerequisites

- The Process Server is deployed and connected to the Red Hat Process Automation Manager
- The **Mortgage Process** application has been deployed
- The user or users working on the tasks must be members of the following groups:
 - **approver** - For the **Qualify** task
 - **broker** - For the **Correct Data** and **Increase Down Payment** tasks
 - **manager** - For the **Final Approval** task

Procedure

1. Log in to Red Hat Process Automation Manager and click **Menu → Manage → Process Definitions**.
2. Click any where in the **MortgageApprovalProcess** row to view the process details.
3. Click the **Diagram** tab to view the business process diagram in the editor.
4. Click on the **X** in the upper-right corner to close the editor.
5. Click **New Process Instance** to open the **Application** form and input the following values in to the form fields:
 - **Down Payment: 30000**
 - **Years of amortization: 10**
 - **Name: Ivo**
 - **Annual Income: 60000**
 - **SSN: 123456789**
 - **Age of property: 8**
 - **Address of property: Brno**
 - **Locale: Rural**
 - **Property Sale Price: 50000**

6. Click **Submit** to start a new process instance. After starting the process instance, the **Instance Details** view opens.
7. Click on the **Diagram** tab to view the process flow within the process diagram. The state of the process will be highlighted as it moves through each task.
8. Click **Menu** → **Track** → **Task Inbox**. This will take you to the **Qualify** form.
9. As the approver, you will review the **Qualify** task information, and if approved, select **Is mortgage application in limit?** and click **Complete**.
10. In the **Task Inbox**, click anywhere in the **Final Approval** row to open the **Final Approval** task.
11. Click **Claim** to claim responsibility for the task, then click **Complete** to finalize the loan approval process.

**NOTE**

The **Save** and **Release** buttons are only used to either pause the approval process and save the instance if you are waiting on a field value, or to release the task for another user to modify.

CHAPTER 11. MONITORING THE MORTGAGEAPPROVALPROCESS PROCESS APPLICATION

The following chapter shows how different bank employees, such as a system administrator or a knowledge worker, might use some of the monitoring capabilities to track an instance of the mortgage approval process.

Prerequisites

The Process Server is deployed and connected to the Business Central.

Procedure

1. Log in to Red Hat Process Automation Manager and click **Menu → Manage → Process Instances**.
2. In the **Manage Process Instances** window, you can set filters, such as **State, Errors, Id**, and so on.
3. Select **Completed** in the **State** filter to view all completed **MortgageApprovalProcess** instances.
4. Click on each of the following tabs to get a feel for what type of information is available to monitor a specific process instance:
 - **Instance Details**
 - **Process Variables**
 - **Documents**
 - **Logs**
 - **Diagram**
5. Click **Menu → Track → Process Reports**. This view contains a variety of charts that can help a senior process manager to gain an overview of all processes based on **Type, Start Date, Running Time**, and so on to assist with task reporting.

11.1. FILTERING PROCESS INSTANCES USING DEFAULT OR ADVANCED FILTERS

Business Central now provides you with default and advanced filters to help you filter and search through running process instances. You can also create custom filters using the **Advanced Filters** option.

11.1.1. Filtering process instances using default filters

Filter processes instances by attributes such as **State, Errors, Filter By, Name, Start Date**, and **Last update**.

Procedure

1. In Business Central, go to **Menu → Manage → Process Instances**.

2. On the **Manage Process Instances** page, click the filter icon on the left of the page to expand the **Filters** pane.

This pane lists the following process attributes which you can use to filter process instances:

- **State:** Filter process instances based on their state (**Active, Aborted, Completed, Pending,** and **Suspended**).
- **Errors:** Filter process instances by errors.
- **Filter By:** Filter process instances based on **Id, Initiator, Correlation Key,** or **Description** attribute.
 - i. Select the required attribute.
 - ii. Enter the search query in the text field below.
 - iii. Click **Apply**.
- **Name:** Filter process instances based on process definition name.
- **Start Date:** Filter process instances based on their creation date.
- **Last update:** Filter process instances based on their last modified date.

You can also use the **Advanced Filters** option to create custom filters in Business Central.

11.1.2. Filtering process instances using advanced filters

Use the **Advanced Filters** option to create custom process instance filters. The newly created custom filter is added to the **Saved Filters** pane, which is accessible by clicking on the star icon on the left of the **Manage Process Instances** page.

Procedure

1. In Business Central, go to **Menu → Manage → Process Instances**.
2. On the **Manage Process Instances** page, click on **Advanced Filters** icon.
3. In the **Advanced Filters** pane, enter the name and description of the filter, and click **Add New**.
4. Select an attribute from the **Select column** drop-down list, for example, **processName**. The content of the drop-down changes to **processName != value1**.
5. Click the drop-down again and choose the required logical query. For the **processName** attribute, choose **equals to**.
6. Change the value of the text field to the name of the process you want to filter.



NOTE

The name must match the value defined in the business process of the project.

7. Click **Save** and the processes are filtered according to the filter definition.
8. Click on the star icon to open the **Saved Filters** pane.
In the **Saved Filters** pane, you can view all the saved advanced filters.

APPENDIX A. VERSIONING INFORMATION

Documentation last updated on Friday, May 22, 2020.