MTAT.03.231 Business Process Management
Practice Session
Business Process Automation in Bizagi

1. Credit Card Application

Implement the following credit card application process using Bizagi. It is strongly suggested that you follow an incremental approach to implement the process: start with 1 task, make the process fully executable and then incrementally extend the process.

The process starts when a customer submits a credit card application. The credit card application needs to have at least one field for the applicant's name, one field for the amount of the card's credit limit and one field for the date of the application (the date has to automatically be filled in by the system). Once submitted, the application is handled as follows:

1. A credit officer verifies the income source of the customer and retrieves the customer's credit history. These two tasks can be done in any order. In order to simplify the example, we will assume that these two checks do not produce any data. In reality, the credit application would be updated with details regarding the credit history and the income source checks, but in this exercise we will not capture this information. When the checks are complete, the credit officer makes a decision whether to approve or reject the application.

2. If the application is accepted, a request to create a new credit card is made. This request is made by the clerk. To simplify the exercise, we will assume that no data is required in order to trigger the request. Simply the clerk has to indicate that the request has been made. The customer is informed that a request has been made.

3. If the application is rejected, the customer is informed of the rejection.

For the purpose of running the process, you should create at least one user with the position "customer", one user with the position "clerk" and one with the position "credit officer".

2. Extension: Granted credit limit

Extend the Bizagi process that you developed in the previous exercise so that when the credit officer makes a decision, they can specify the amount of the "granted credit limit". The amount of the credit limit granted by the credit officer can be lower or higher than the amount of the credit limit originally requested by the customer. For record-keeping purposes, it is important to keep both the "original amount" and the "granted amount" in the credit card application.

3. Extension: Rejection Reason

Extend the Bizagi process that you developed in the previous exercise so that when the credit officer rejects an application, they must specify the reason for rejection. There are 6 possible reasons for rejection: "Insufficient income", "Unreliable income source", "Bad credit history", "Over-leveraged customer", "High-risk profile" or "Other".

Hint: To know more about the Bizagi's features check out Bizagi's tutorial:

http://help.bizagi.com/bpmsuite/en/my_first_and_my_second_process.htm