Lab 1 Process Portal

1.1 Overview

This lab exercise will make you familiar with the key capabilities of the ready-to-use Process Portal included with IBM® Business Automation Workflow.

You will experience how Process Portal enables task management, task completion, and process visibility. This lab is organized in the following way:

- Introduction and first steps
- Launching a process
- Working with the built-in dashboards
- Tailoring the Process Portal

1.2 Introduction

Process Portal provides end-users with a ready-to-use environment that allows them to manage their tasks, interact with the user interface of business processes and collaborate with other users.

Process visibility can also be acquired through Process Portal. It is the user interface environment that allows users to interact with, and gain visibility over, business processes. It is provided as a **ready-to-use** web application that also has rich collaboration features.

Process Portal can be **customized** to fit the graphical look and feel of each company. Customers might also opt to create their own process portal. However, it is important that you consider the value you can get by **simply reusing** the portal capabilities that IBM Business Automation Workflow offers ready for immediate use.

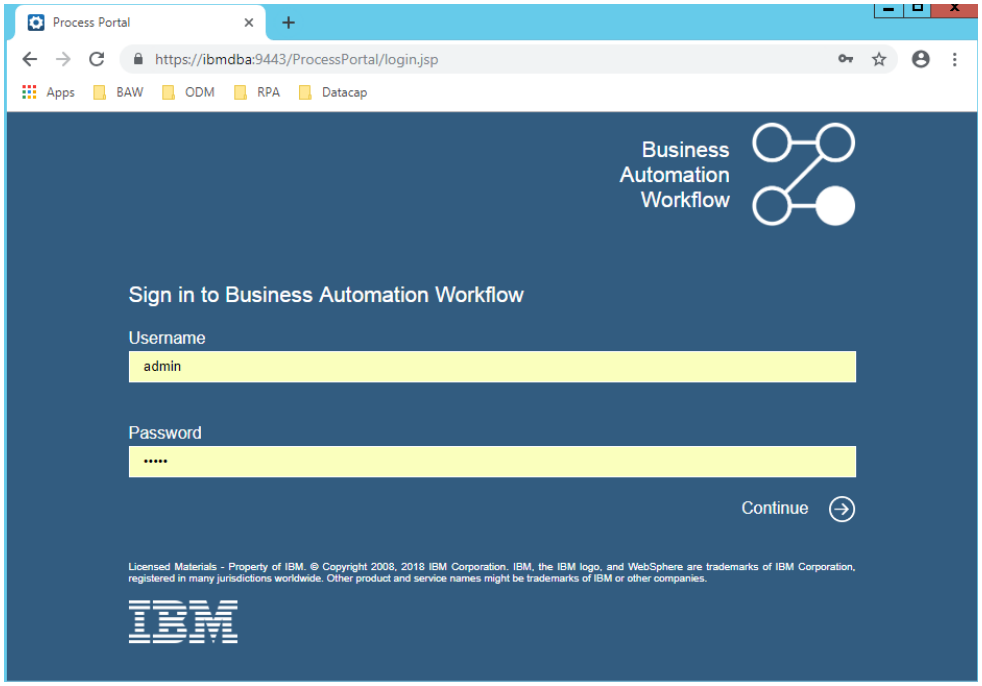
1.3 First Steps with Process Portal

__1. If the Workflow Center server is not started, please start it using the instruction in the Appendix. If you are unsure, please ask your instructor.

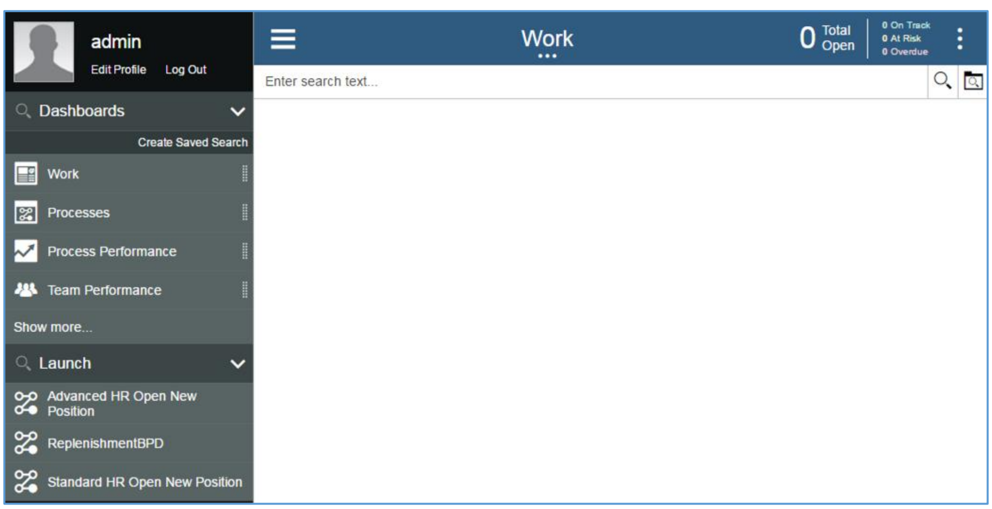
__2. Open up Chrome web browser. Either select **BAW → Process Portal** from the bookmarks toolbar or enter the following URL: https://ibmdba:9443/ProcessPortal/login.jsp

__3. Log in with the following credentials and click on **Continue**.

- Username**: admin**
- Password**: admin**



__4. The default home page for the Process Portal appears.



The navigation bar on the left allows you to work with different aspects of the portal:

__a. **Work** (shown): Displays the tasks you can work on. The list is currently empty, since we have no data in the system yet.

__b. **Processes**: Shows lists of active and completed process instances __c. **Process Performance**: Shows the status of the active instances of particular processes in your organization. You can act on individual process instances to resolve issues, such as bottlenecks.

__d. **Team Performance**: Shows the status of the tasks for teams for which you are the designated team manager. You can manage the work load for the team and individual.

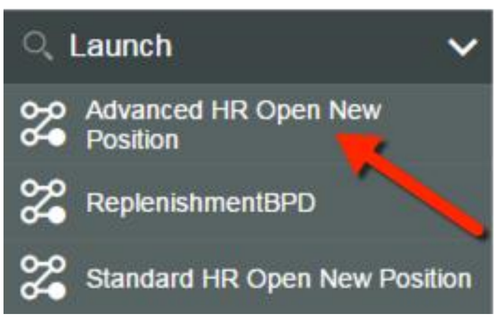
__e. **Launch menu**: Allows you to launch instances of processes in your organization. There are currently three different processes shown. These three processes are automatically installed with every BPM environment.

We will soon explore each of these aspects in greater detail.

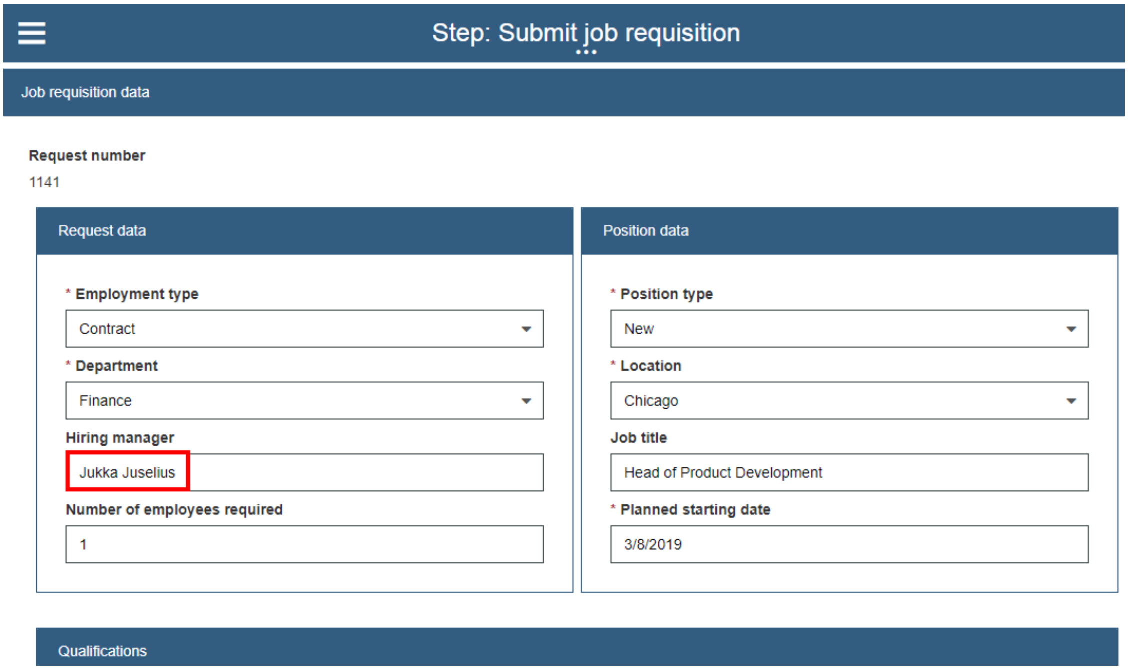
1.4 Launching a process

There are three business processes that are already configured in your Workflow environment. These three are available by default in any Workflow installation. We will now create some “instances” of these processes.

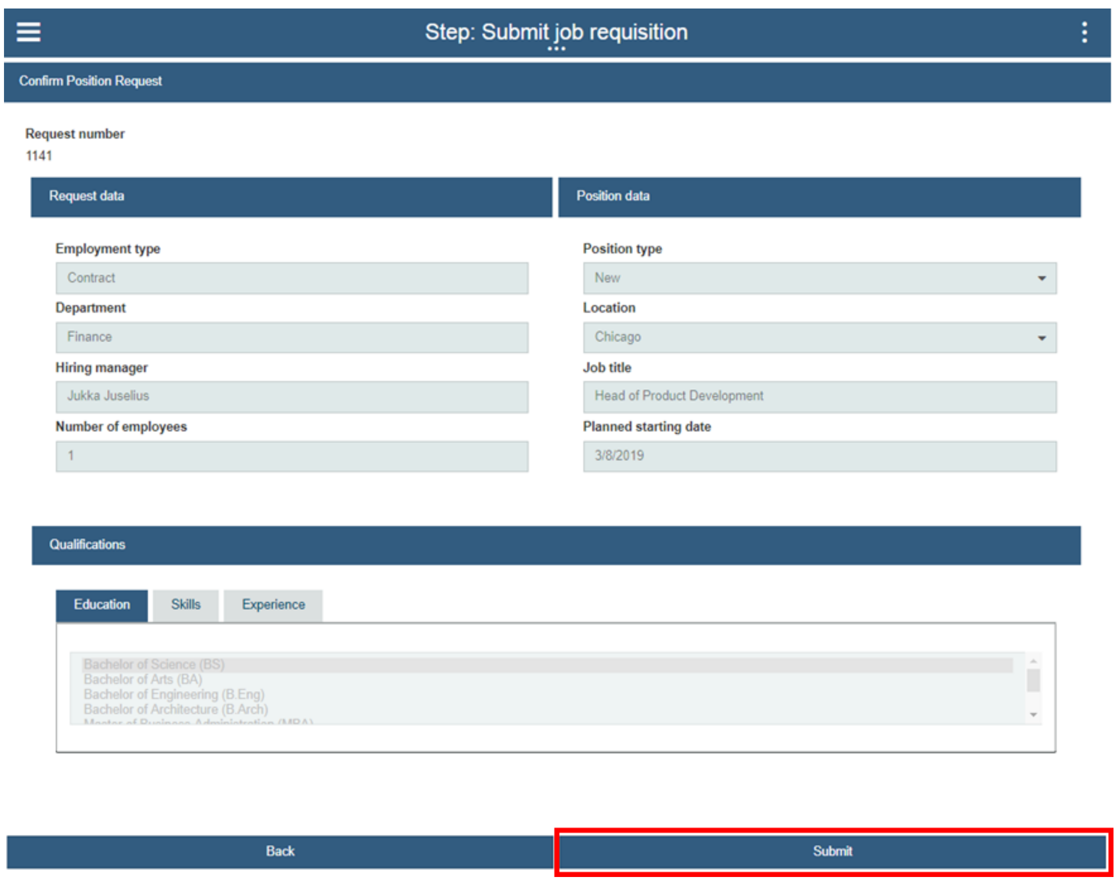
__1. In the Launch menu, click on **Advanced HR Open New Position**.



__2. A screen appears, displaying a web form for you to submit a job requisition. Many of the fields are already filled in. **Change** the hiring manager to <your name>. Optionally, change the other fields as you wish. You may also select options for Education, Skills and Experience, under Qualifications, if you wish. Then click **Next.**



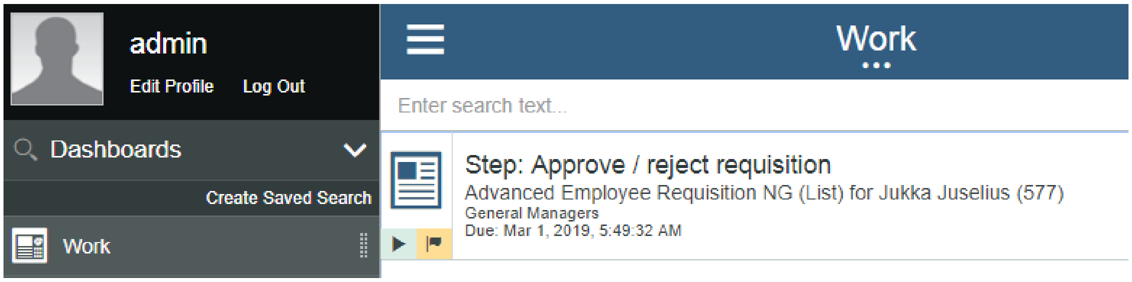
__3. A confirmation screen appears next. Click **Submit**.



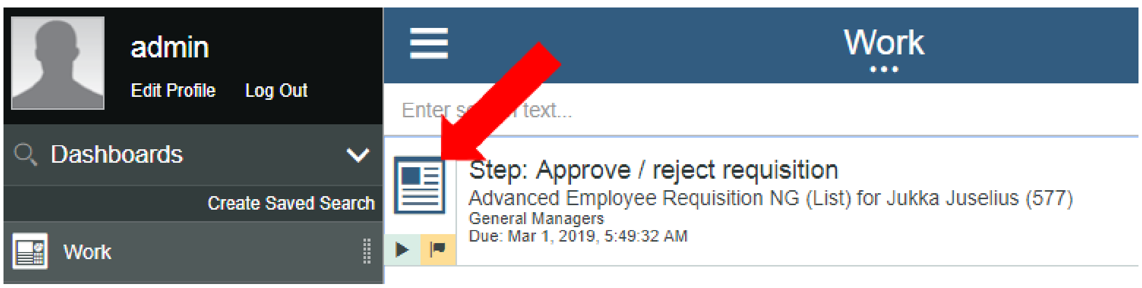
Congratulations – you've created your first process instance!

__4. Your Work list should now appear, with a new task called **Approve / reject requisition.**

In this lab, we are keeping things simple, so you are logged on as an Admin user, with access to everything. In reality, if you were the submitter of the HR request, you would not have the ability to approve/reject the requisition; it would be someone else's task.



__5. Look at the **Step: Approve / reject requisition** entry in your Work list. **Click** the **Task icon**, to the left of the text that says "Step: Approve…"

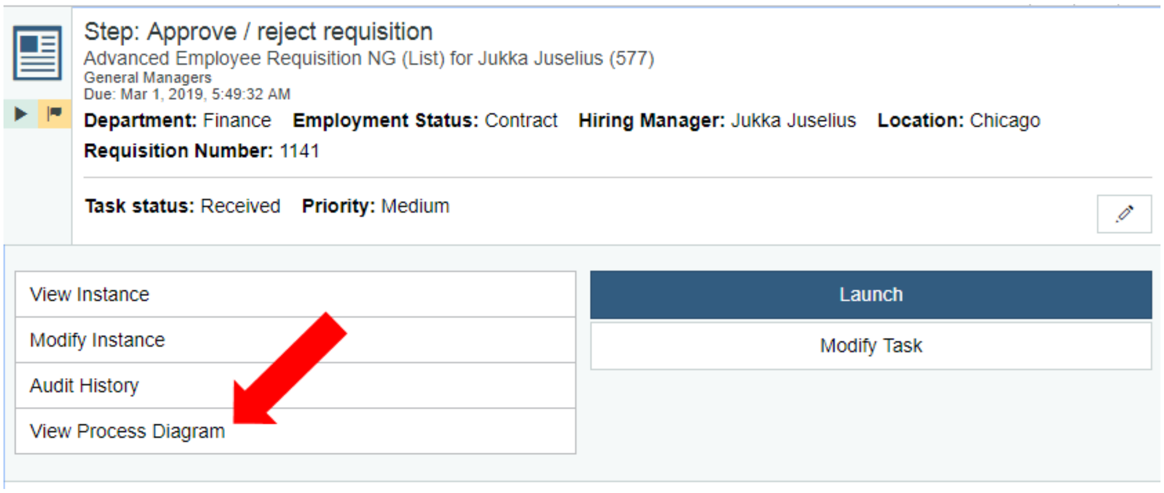


__6. The entry for the task window will now expand, showing you extra details about the task.

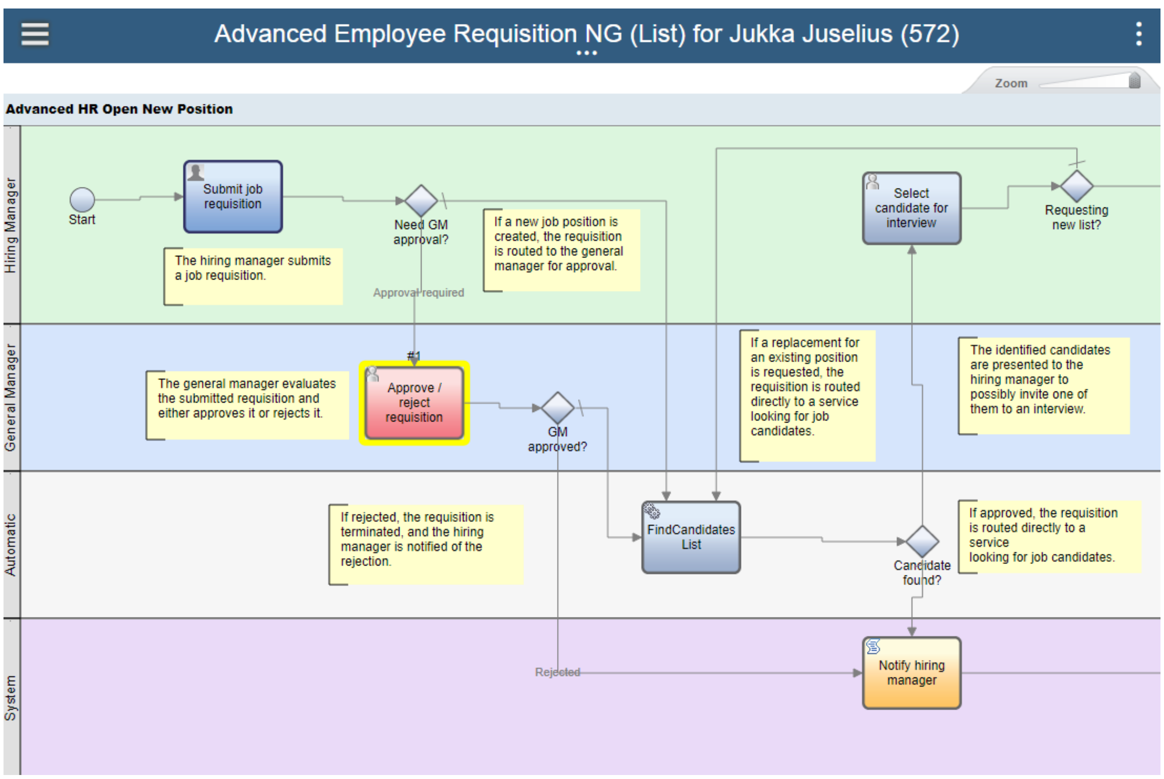
Details include:

- Business data relevant to this task, such as a department, hiring manager, and location
- Task details: status and priority
- Options to view additional information about the task: view instance, modify instance, etc.

__7. Click **View Process Diagram.**



__8. A graphical diagram will now appear. This is the business process diagram, which shows you the flow of activities that need to be taken for each Employee Requisition.



__a. **Note the yellow box** highlighting around the “Approve/reject requisition” activity. This indicates that this activity is currently active. From the diagram, we can see that this is the second activity in the process, and this activity is performed by people in the General Manager swim lane.

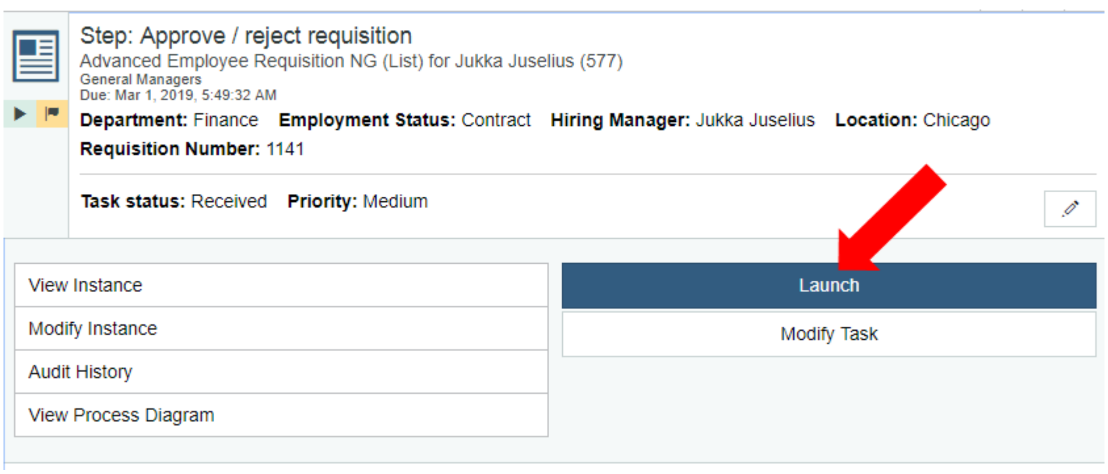
__b. We can infer from this diagram that the Submit Job Requisition activity has already occurred (we also know this). You can **click the Submit job requisition** activity box to see extra detail about it.

We can see who performed it (the owner, “admin”) and when the task was completed (end date).

__c. We can also see the upcoming activities in this process.

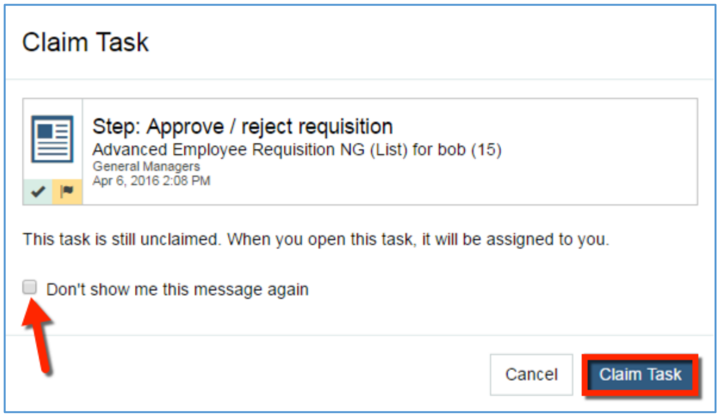
__d. Click the **ellipsis (…)** below the title bar. A menu will slide out. Click **Close** to return to your Work list.

__9. So far, we have only examined the task. Now, let’s work on the task. Click the **Launch** button.



__10. A prompt **would normally appear**, but when the lab was tested in this environment, the selection ”Don’t show me this message again” was **already enabled**. By default, a task is available to anyone in your role

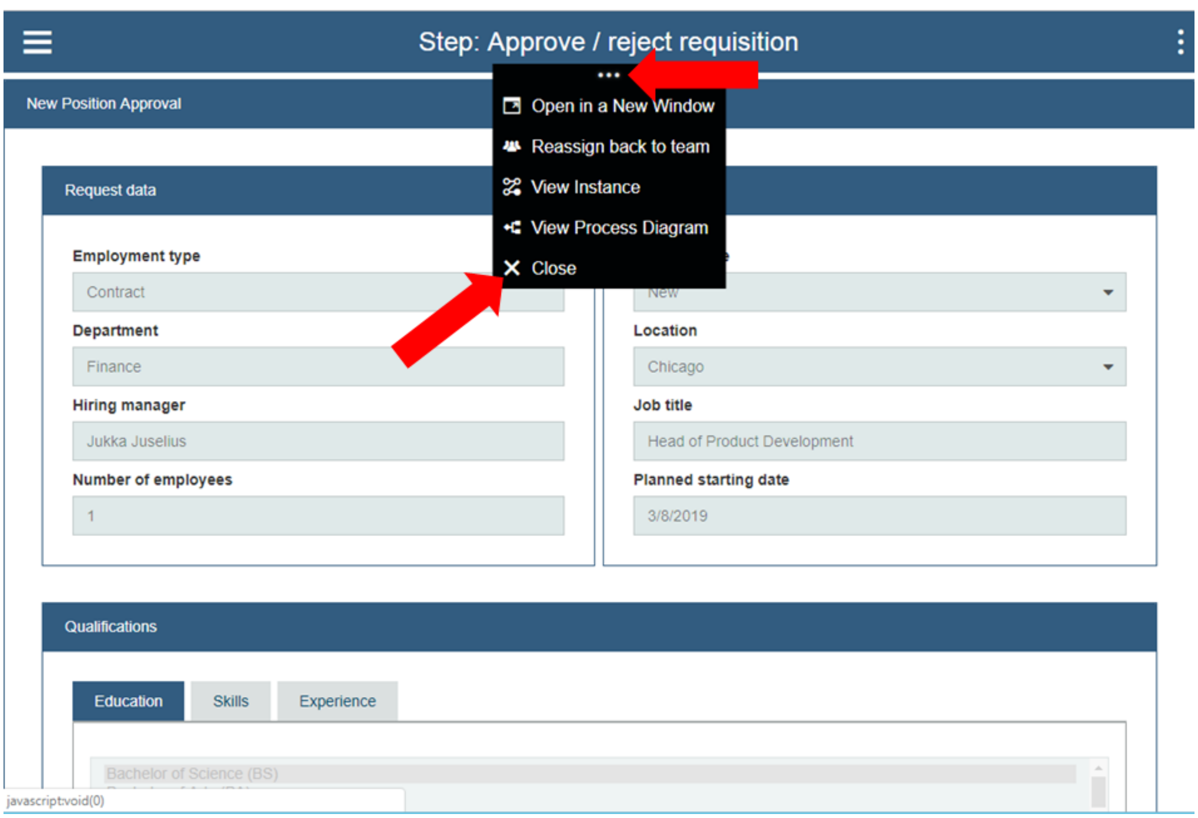
(General Managers). When you decide to work on a task, you "claim" it. This makes the task now only available to you to work on.



You may choose to select **Don't show this message again** if you would like to remove this confirmation prompt (and this was earlier done when testing the lab in this image).

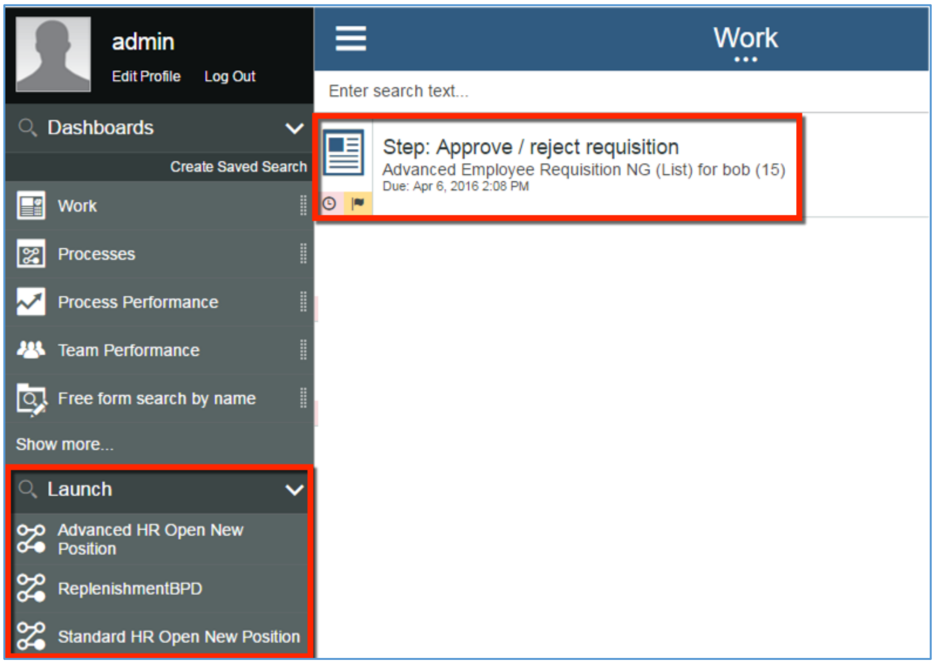
__11. Upon claiming the task, a new screen appears. It contains a summary of the requisition data and asks you to approve or reject the requisition. By clicking Submit, you would complete the task and move forward in the process, but please **DO NOT complete this step** for now, however. We would like to show you a few more things about the Process Portal first.

Click the **ellipsis (…)** at the top of the screen and then click **Close** to close the task without completing it.

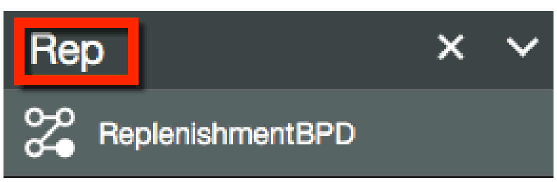


__12. Now we are back to your Work list. The task Approve/reject requisition still remains in your Work list, because you did not complete it. You may come back to this task at any time.

Although you are working on one task, you may do other things in Process Portal. Let's look at the **Launch** area. We will now launch some other business processes. Process Portal allows you to track multiple process instances in one place.

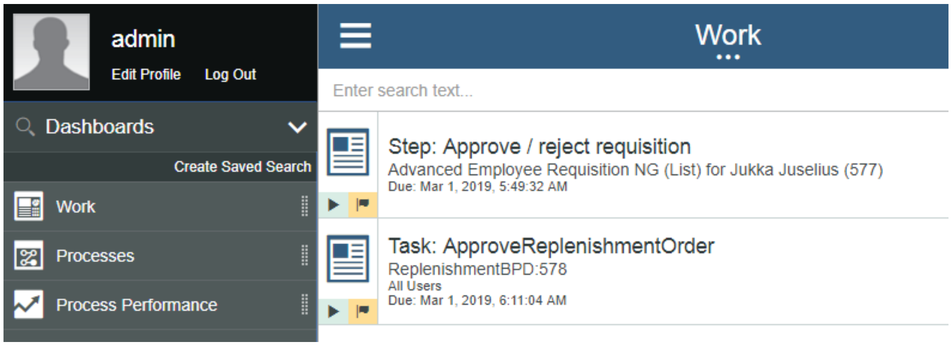


__13. Let's start an instance of the process ReplenishmentBPD. We will do this in a slightly different way. Click the search icon (the magnifying glass) at the left of Launch section and then start typing **"Rep"** as in "replenishment."



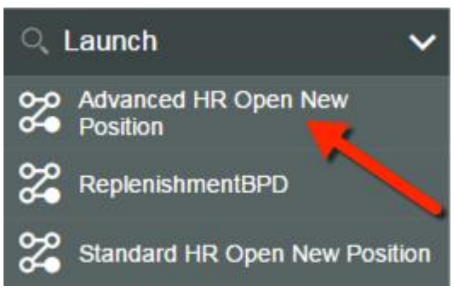
This approach of using the search is useful if your environment has many processes available to launch.

__14. Click on **ReplenishmentBPD** to start an instance. You should now have another task under Work. Click **Work** to refresh if it doesn't refresh automatically. We won't work on this instance though; we will simply leave it on your Work list.



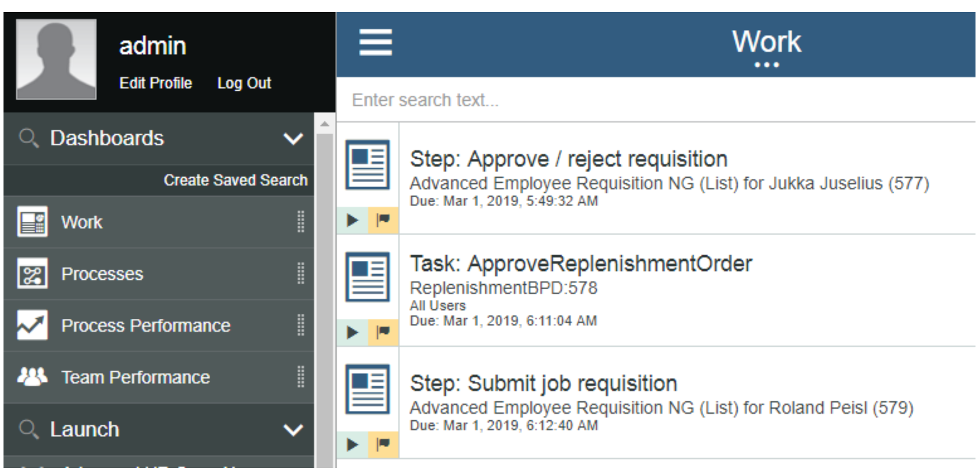
__15. **Click the X** in the search area of the Launch tab to remove the filter for "rep".

__16. Start a new instance of **Advanced HR Open New Position**.



__17. This task will automatically launch. **Close** it without completing it (click the **ellipsis (…)** and then click **Close**.

__18. You should have a Work list with three tasks, including this last task:

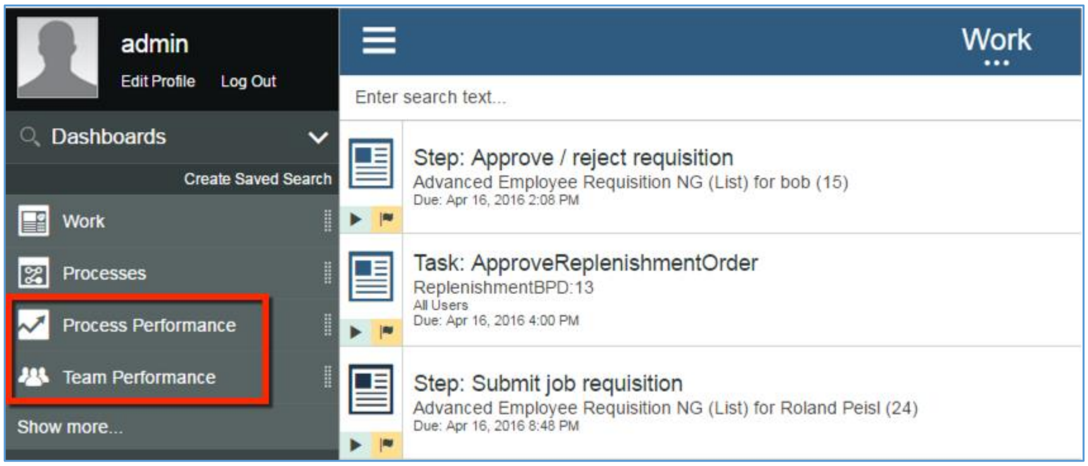


Notice that two the instances are for the same process, Advanced Employee Requisition NG.

1.5 Working with the built-in dashboards

IBM Business Automation Workflow provides built-in dashboards for visibility. These dashboards are appealing, functional, and powerful: **Team Performance** and **Process Performance**. Team Performance as the name suggests, allows you to manage your team, while process performance allows you to manage an entire process and team members participating in the process. Let's take a look at these dashboards.

These two dashboards appear below the default Work dashboard:



1.5.1 Process Performance Dashboard

The Process Performance dashboard allows authorized users to monitor the process activity, identify at-risk or overdue processes, and take appropriate actions to correct those situations. Let's take a look at it.

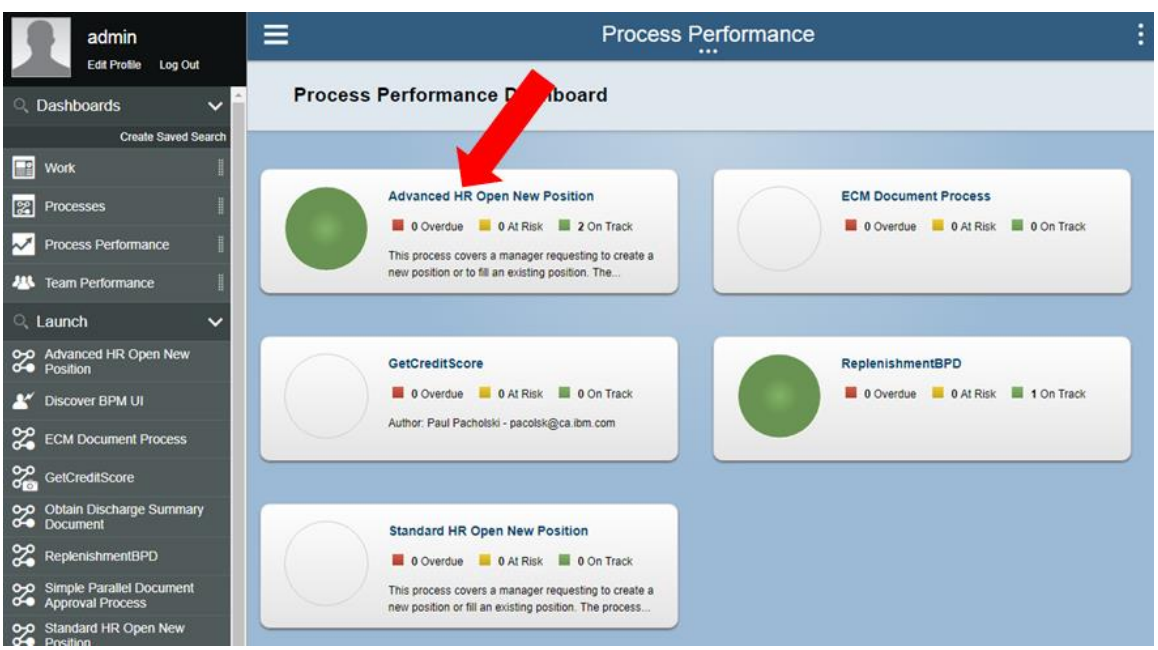
__19. Click **Process Performance** on the main toolbar.

__20. You will be presented to the general process performance page, where you can see the processes you are authorized to monitor. You can see the five processes that have already been installed in your Workflow environment.

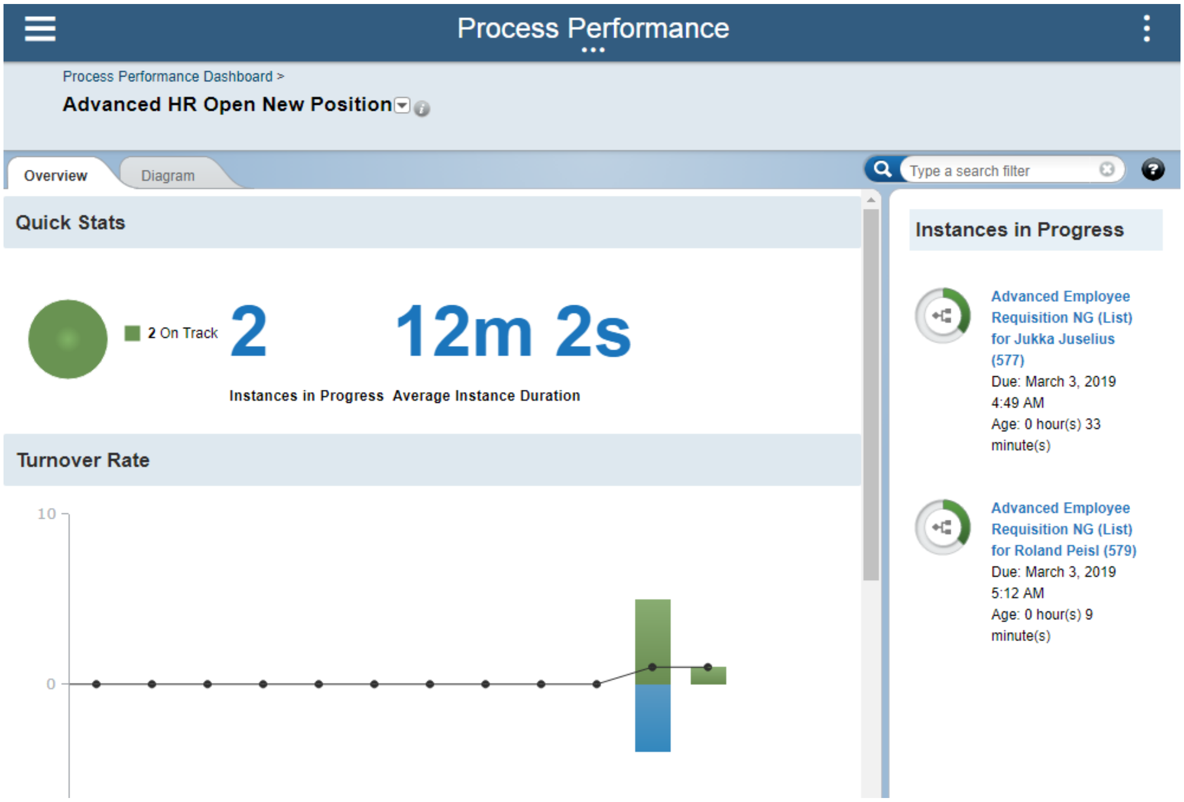
The overview page shows a pie chart for each process and gives you an immediate sense of whether processes are on target, at risk, or overdue.

- We had previously created a few instances of Advanced HR Open New Position and ReplenishmentBPD. Our processes should be 100 percent on target (the pie chart is all green).
- Since we have not created any instances of Standard HR New Position, its pie chart is empty.

__21. Click **Advanced HR Open New Position** to look at the detailed process performance metrics for this process.



__22. A new page opens up, showing a wealth of information about this process. Keep in mind that the metrics, the number of open tasks, and other elements in the page may look different on your system, since they are a function of time, and of how many instances were created in the past – but the screen should look similar to the following:

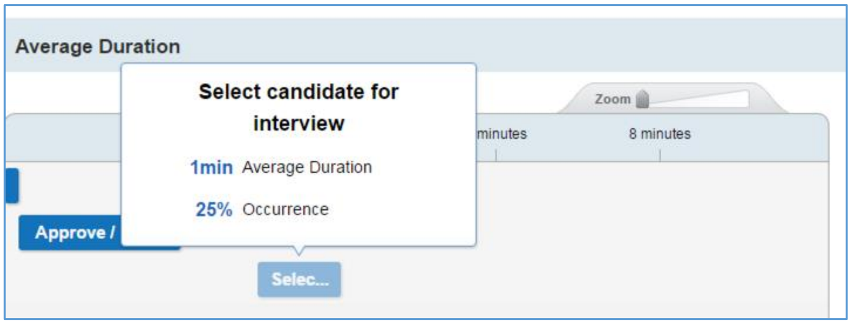


__a. The **Quick Stats** section gives you high-level information regarding the overall health of this process.

__b. The **Turnover Rate** section provides an indication of how rapidly instances are created and completed.

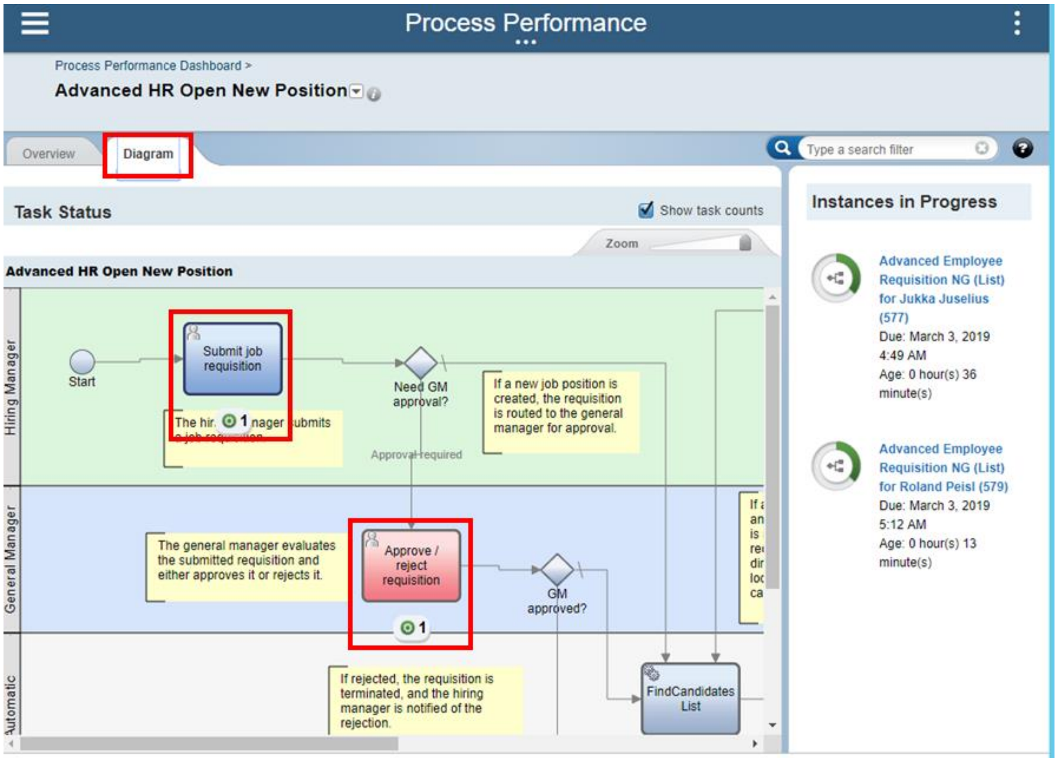
__c. The **Instances in Progress** section (on the right-hand side) provides a quick view of the running instances of the process. We can see that the two Hiring Requisition process instances we previously created are shown here.

__d. Scroll down, and you will see another section named **Average Duration** that provides consolidated information for the tasks of all instances. NOTE: If you have not completed an instance from end-to-end this chart will not load and instead, it will give you a message saying there are no closed instances; if so, skip this step. This diagram shows how long each activity takes on average, and how frequently that activity is executed throughout the various process instances (keep in mind that activities could be executed only in some cases, depending on the logic within the process). Click any task to see its information. In order to see the Average Duration dashboard populated, you need to complete at least an instance of an Advanced HR Open New Position end-to-end and have its status as Completed. If you choose to, please complete at least one instance.

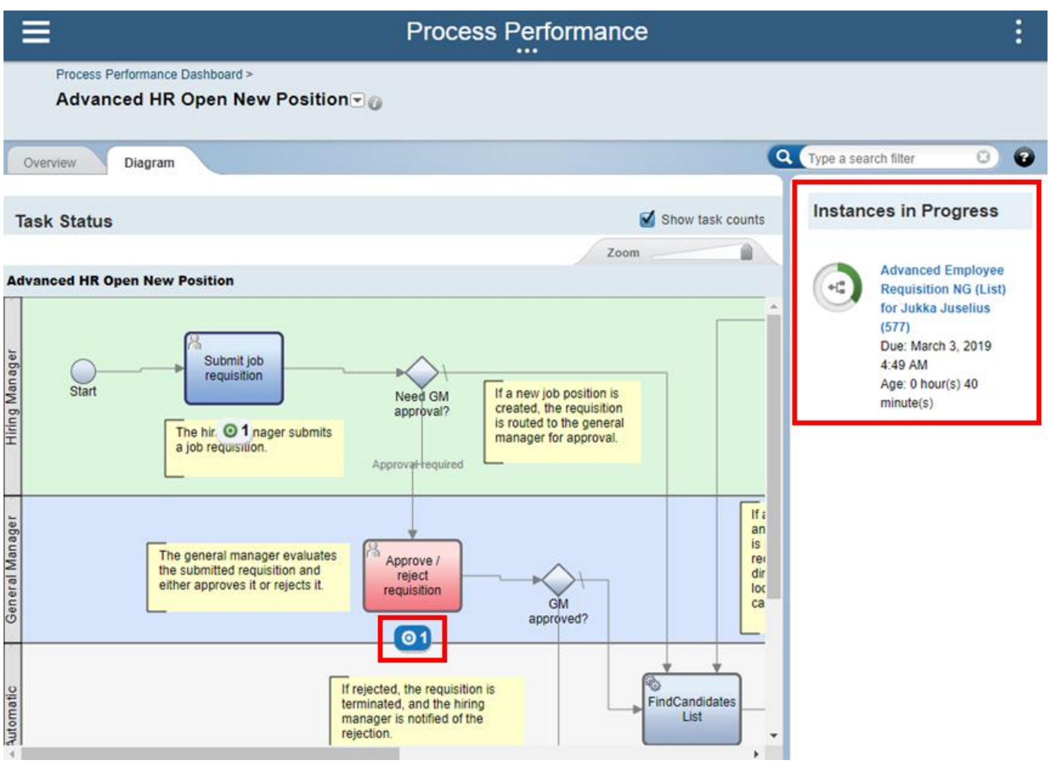


__e. Click the **Diagram** tab. The dashboard will show the process diagram and consolidated information about its tasks. Keep in mind that here you are not looking at a specific instance; you are looking at the behavior of the process overall, in statistical terms.

We already know there are two instances of this process currently running. This diagram breaks things down further. Under the activity boxes for Submit Job Requisition and Approve/reject Requisition, a green circle and the number 1 are shown. This indicates that there is 1 task at each of these steps, and the tasks are currently on time.



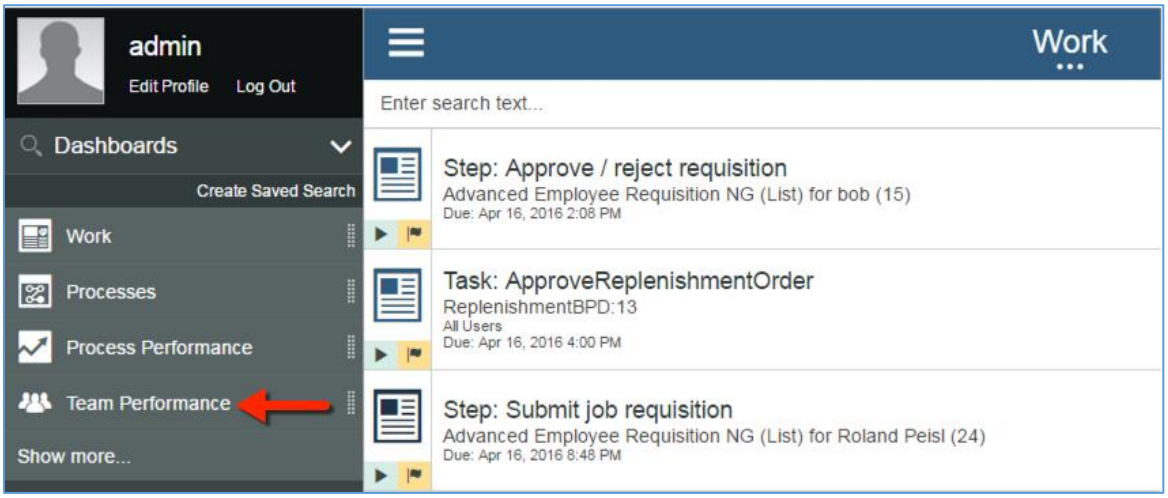
__f. **Click the box with the 1** under **Approve/reject requisition**. The box turns blue to indicate it was selected. On the right side of the screen, the Instance in Process list has been filtered to only show instances at this step. The instance shown was the first instance you created earlier. If you hover your mouse over this instance, you will see more detail.



1.5.2 Team Performance Dashboard

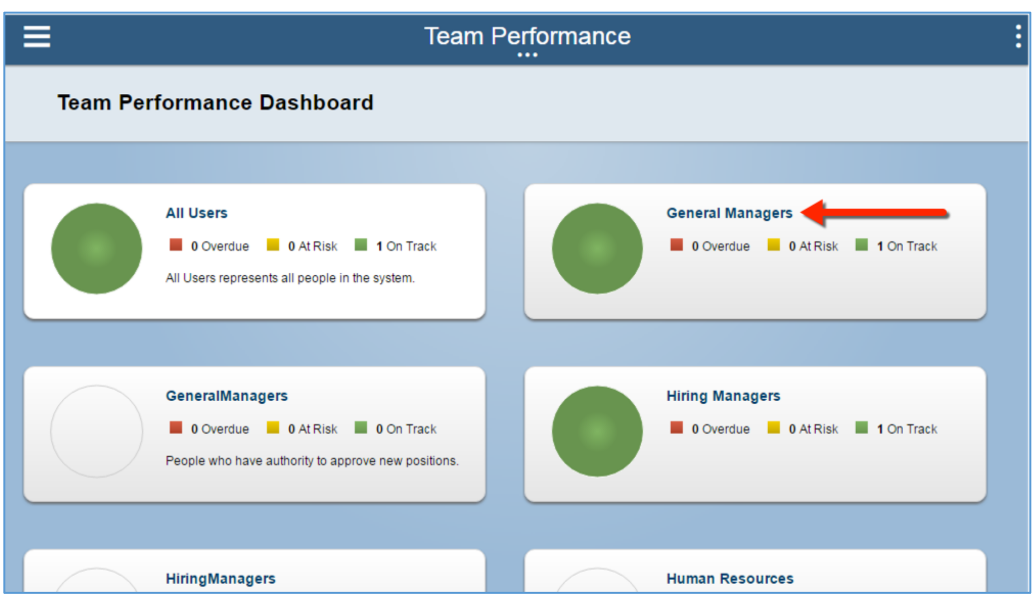
Now, let's navigate to the Team Performance dashboard and check how a manager can visualize the activities associated with the managed team members.

__23. Click **Team Performance** in the navigation pane.



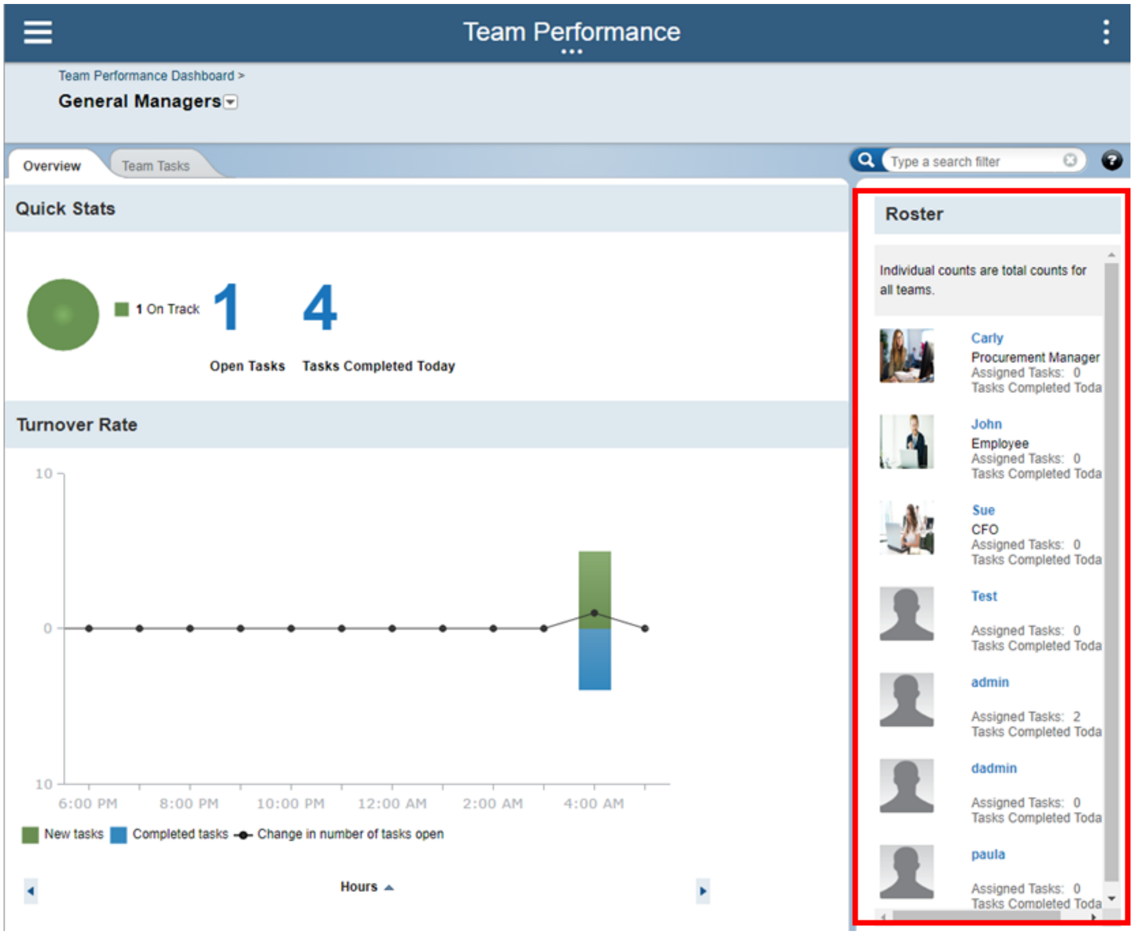
__24. The dashboard main page will be displayed. This page gives you an immediate sense of whether your teams are working effectively enough or falling behind schedule.

You will see several teams listed. These are the teams that were defined by the three processes installed in your environment. Your userid, "admin", is configured to be able to view the performance of each of these teams.



Note: The pie charts might be different, depending on the timing, number of active instances, and so on.

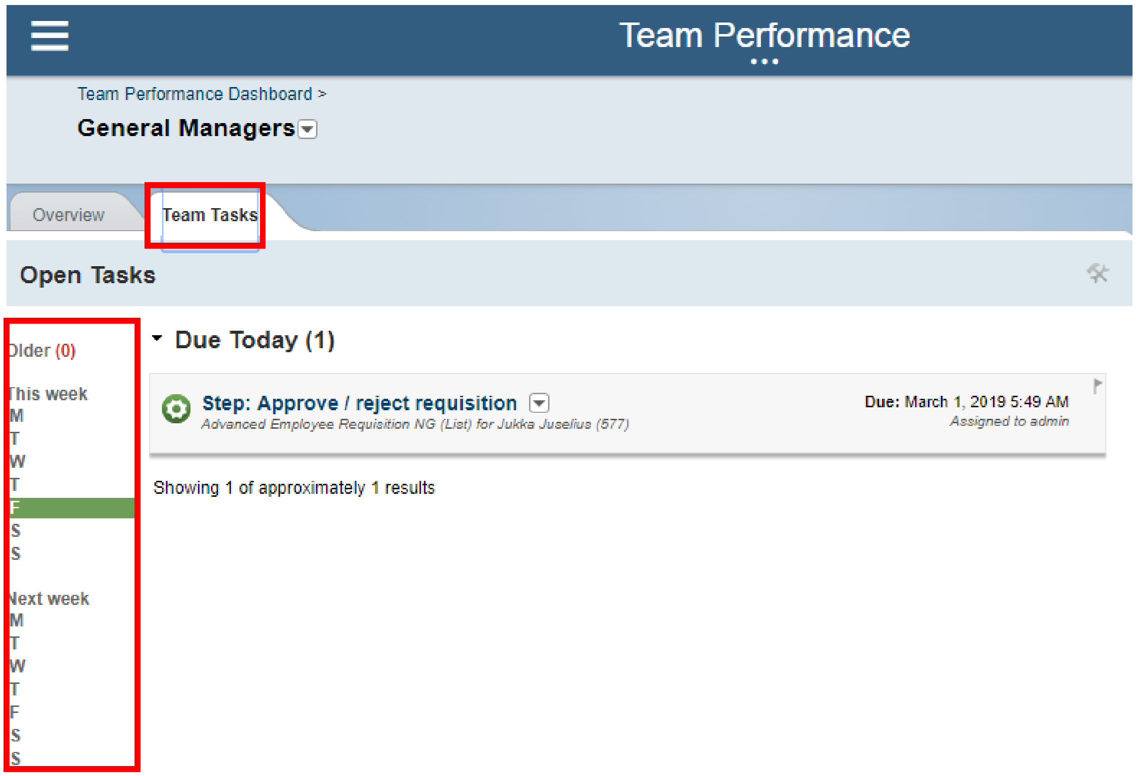
__25. Click **General Managers** to drill down and inspect the performance of that team.



The appearance is similar to the Process Performance dashboard, but the information is specifically associated with the General Managers team.

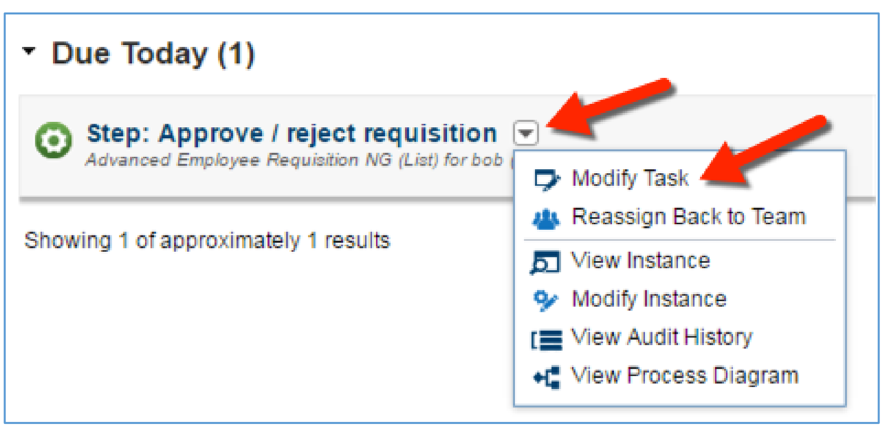
On the right-hand side, there's the **Roster** section that shows how the team members are performing individually. If we had more tasks, the list would show the most "productive" individuals first (those who have completed the larger number of tasks).

__26. As a manager, you can further drill down and check out the status of the various tasks assigned to your team members. Click **Team Tasks** to switch to that tab and observe the details.



On the left, you can see the distribution of activities throughout time: you can **click** a **specific day of the week**, and focus on activities that are due that day.

__27. This dashboard also allows you to take corrective actions on these activities. For example, you can reassign a task to another user: **click the pull-down menu** located by one of the tasks, and then **Modify Task:**



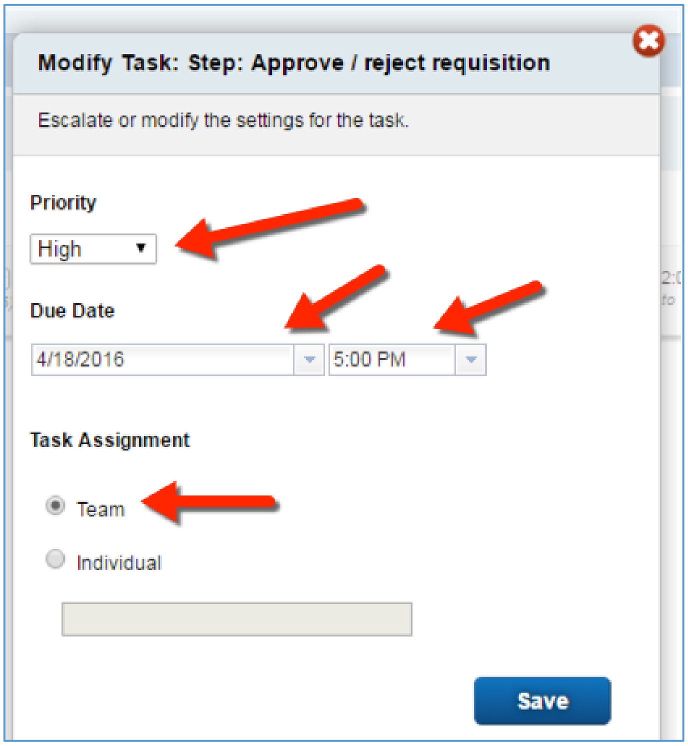
__28. A window appears. You may modify aspects of the task, such as priority, due date, and assignment. Let's change the following:

__a. Priority: Set to **High**

__b. Due date: Set to a date/time **to a day of next week**

__c. Task assignment: Select **Team** as this will reassign the task back to the team

__d. Click **Save**.



__29. The task list will now be refreshed. Note the following:

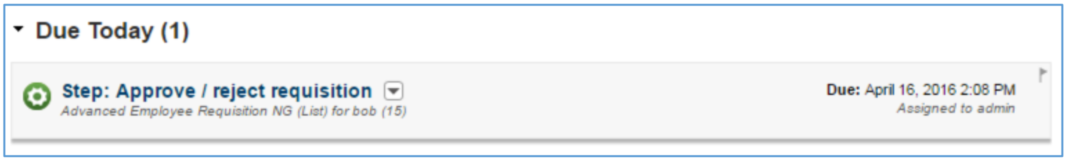
__a. The task is listed as “Due Later” rather than “Due Today”

__b. The new task due date is shown

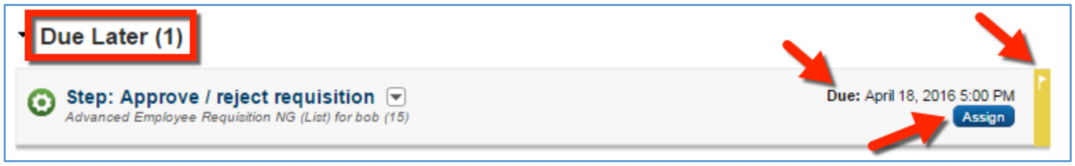
__c. Since the task was reassigned back to the team, it is now “unclaimed.” Any team member may work on the task. In the Team Performance view, you as a manager now have an option to explicitly assign the task if you wish.

__d. A yellow highlight and flag appear next to the task, indicating that it is high priority.

Before:



After:

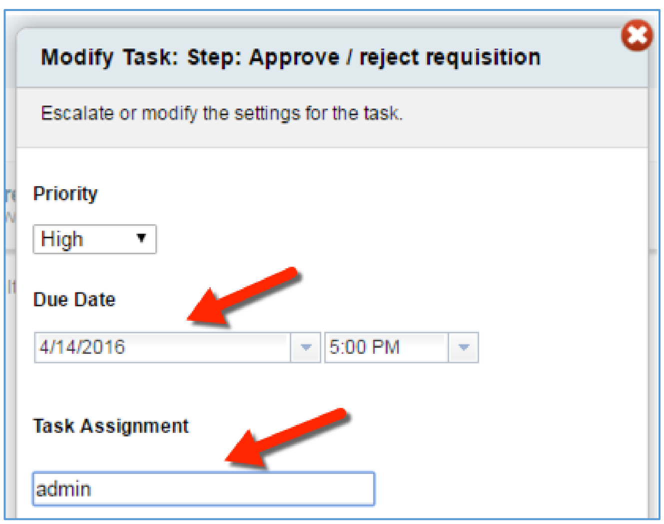


__30. Now let's modify the task again. This time, let's **set the due date** to a day in the past. Then click **Save**.

__a. Due date: Set to **yesterday's date**

__b. Task assignment: Assign it back to **admin**. Note: If you see a message saying "User 'admin' is not a member of the team" – ignore it – the assignment will still work.

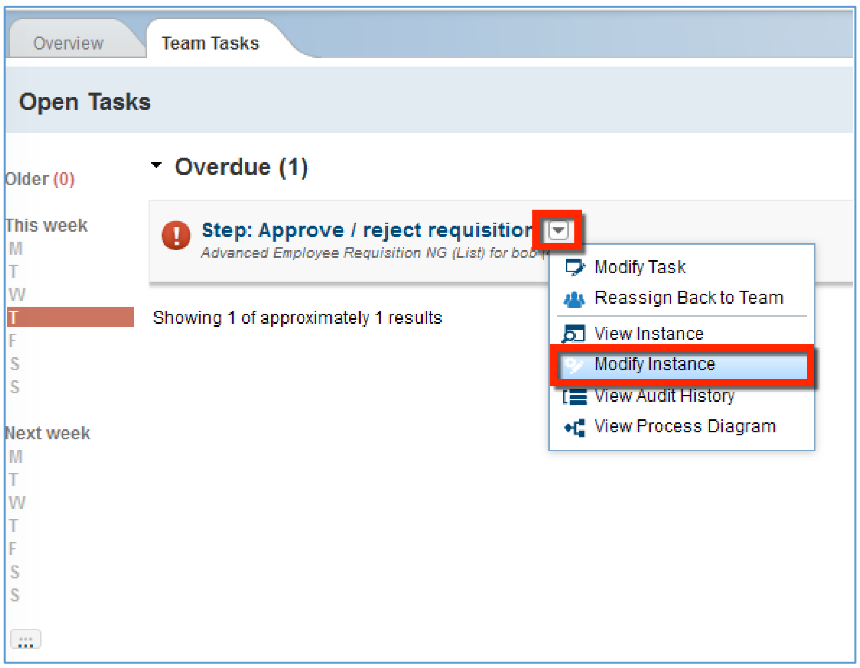
__c. Click **Save**.



Note: We are artificially changing due dates, so you can quickly see how the Process Portal dashboards can provide real-time updates on the health of your business processes.

__31. The task list will be refreshed again. This time, you will see a red alert circle next to the task name, and the task is now listed as Overdue.

__32. You can modify the process due date in a similar fashion as modifying the task due date. For the same task that you modified the due date, **click the pull-down menu** and then select **Modify Instance:**

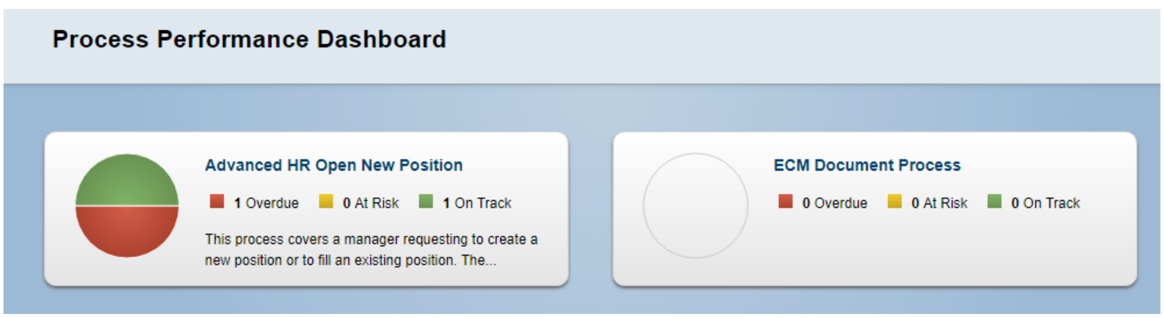


__a. When the calendar shows up, select the due date to yesterday's date or earlier.

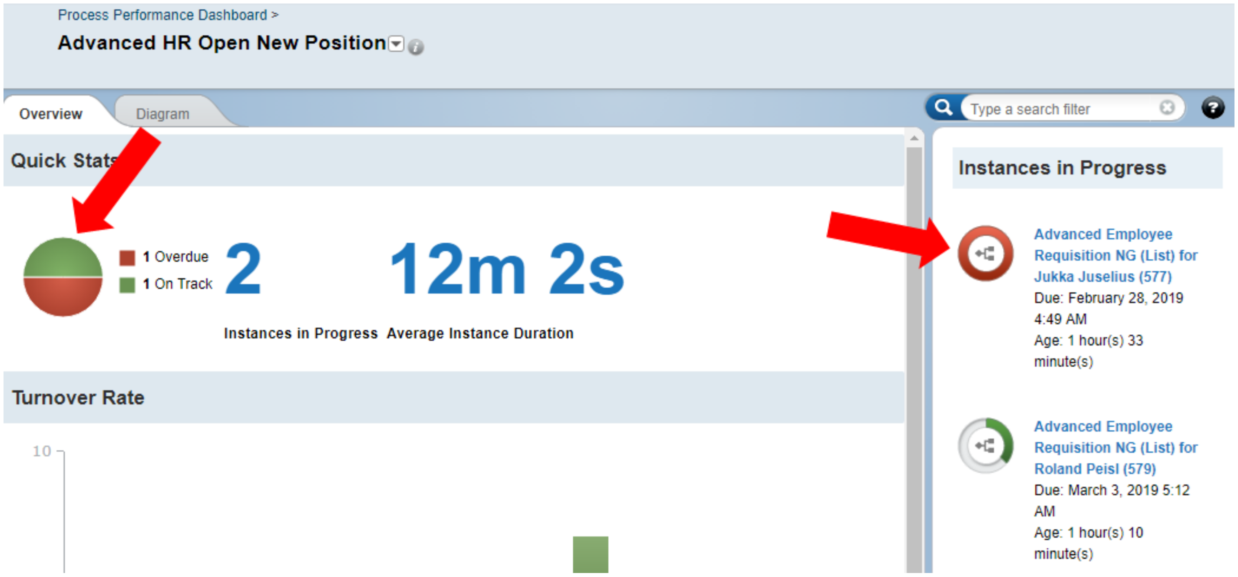
__b. After you make a date selection, the Save button will appear. Click **Save**.

__33. Now go back to the Team Performance dashboard and the **Overview tab**. You will now see the overdue condition reflected in this team's performance.

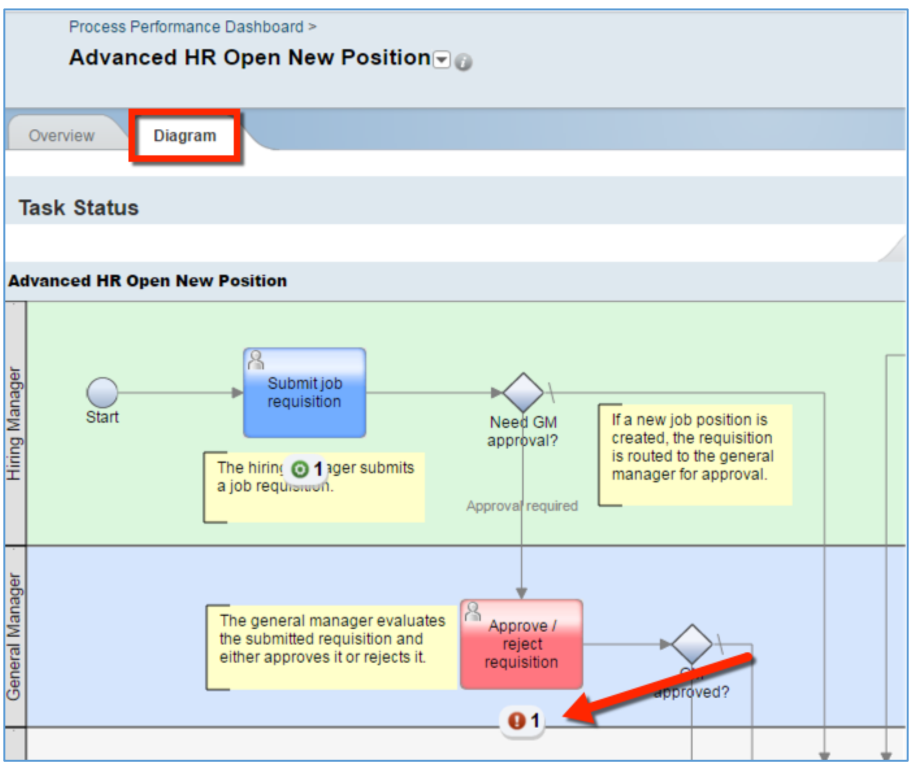
__34. Now let's go back to the **Process Performance** dashboard. You will now see that half the tasks in Advanced HR Open New Position is on time, and the other half is overdue.



__35. Click **Advanced HR Open New Position** to view the dashboard for that process. The Instances in Progress area on the right now displays our overdue task with a red circle. Click on the pie slice (red or green) to filter instances in progress on the right.



__36. Click the **Diagram** tab. There is still one task listed under Approve/reject requisition, but it is now displayed with a red icon, indicating it is overdue.



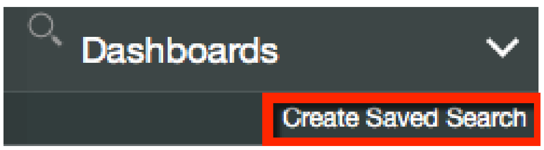
1.6 Tailoring the Process Portal

Process Portal is a powerful, yet flexible environment. As a user, there are a number of ways to configure the Process Portal to suit your individual needs.

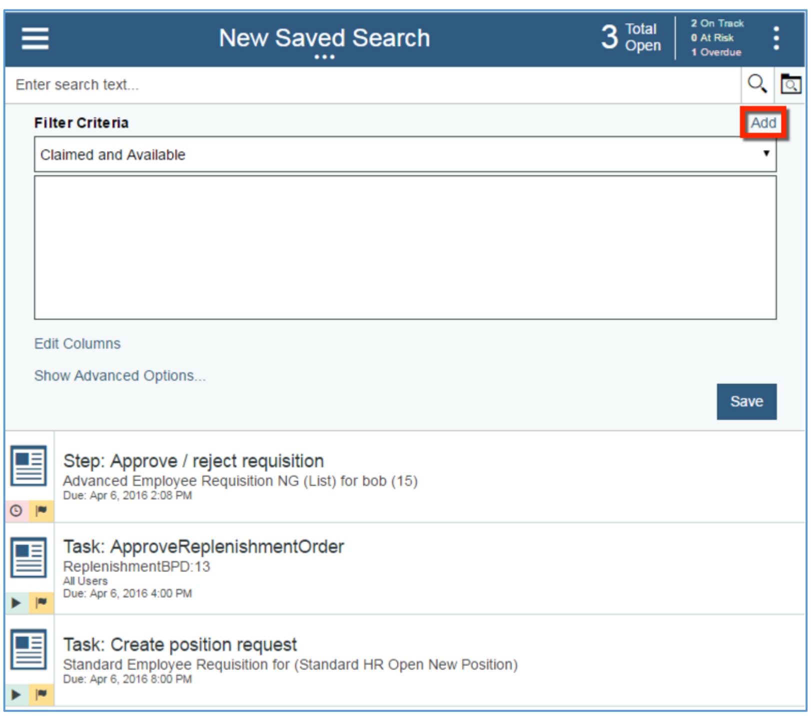
1.6.1 Create, favorite, and share saved searches

Now that there are some process instances in the task list, this section will show how to create saved searches that can be used to do custom searches and can be shared with teams that you are a member of. Administrators can also create saved searches and share them with any team. You can also favorite a saved search for easy access from the Dashboards list and set your default start page by moving your favorite saved search or dashboard to the top of your list.

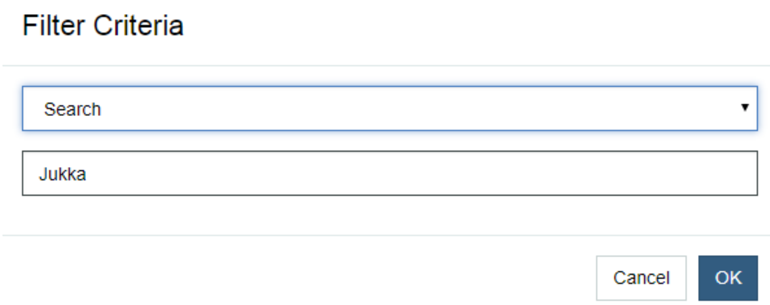
__37. We will now create a saved search to show a free form search. Under the **Dashboards** section, click **Create Saved Search**.



__38. The New Saved Search editor opens. Notice that you have Filter Criteria that you can add. Since this is a new search, no Filter Criteria have been added so far. Also notice that the task list items appear below and will dynamically refresh as you modify the saved search. Click **Add** to add filter criteria.

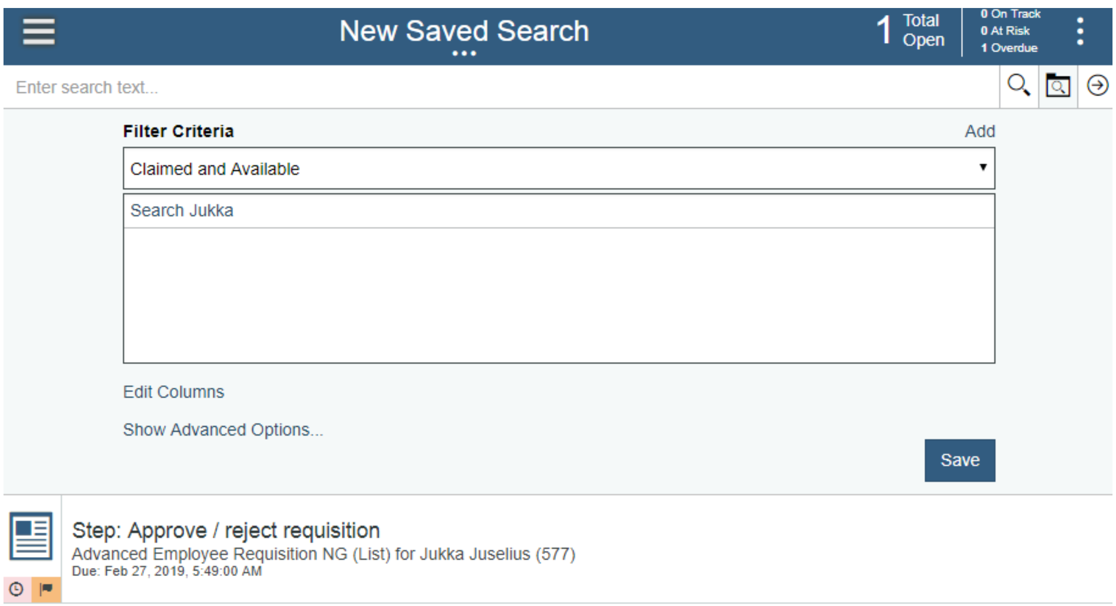


__39. A Filter Criteria prompt opens. Enter **<your_name>** under Search where it says Enter search text… and then click **OK.**

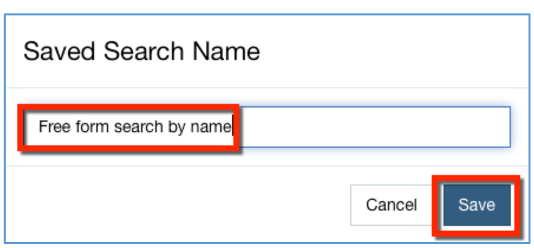


Note: Enter the name you used in the name field of the first HR Hiring process instance that you created.

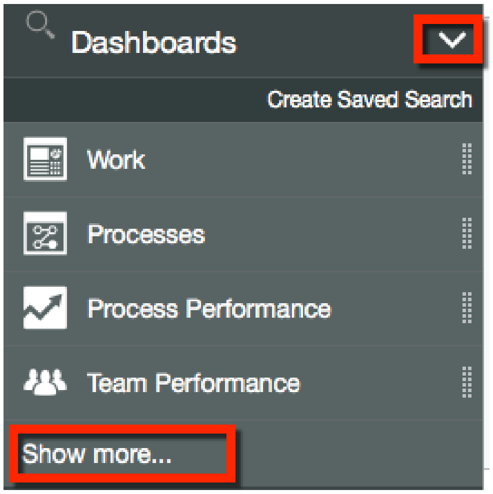
__40. Notice that the task list refreshed and you should see just one task:



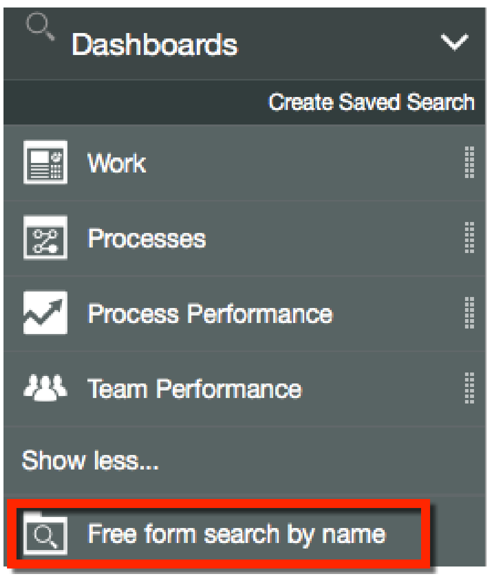
__41. Click **Save** as depicted above. Name the search **Free form search by name** and then click **Save.**



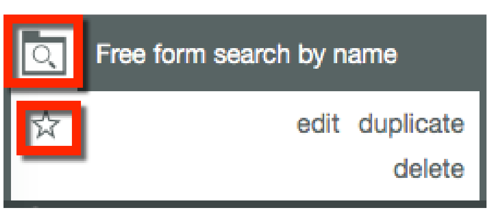
__42. To access the saved search again, under **Dashboards** click **Show more:**



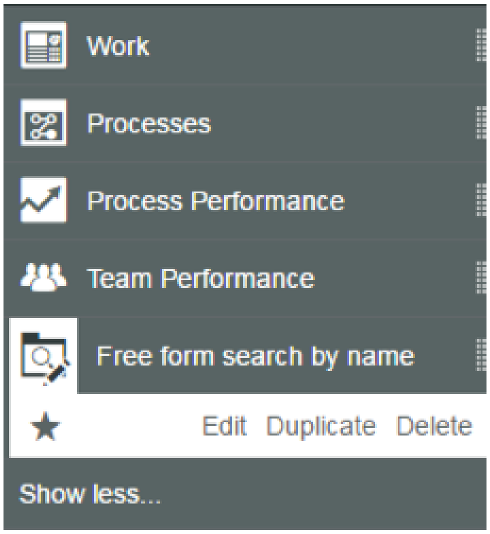
__43. The saved search should now appear in the list of dashboards. Alternatively, you could have used the search feature of the dashboards to find that saved search by searching by its name:



__44. You have the ability to set a saved search as a favorite. Click on the icon next to the name of the saved search, you will see options for making the search a favorite, editing, duplicating and deleting the search. Click the **star**. This saved search is now a favorite.

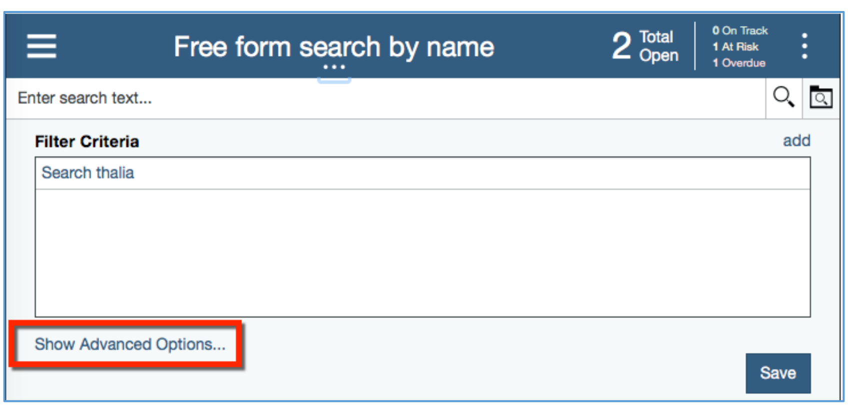


__45. By making this saved search a favorite, it now appears under the list of dashboards without having to search for it or clicking Show More. You can click the icon next to the name to hide the area with extra options.

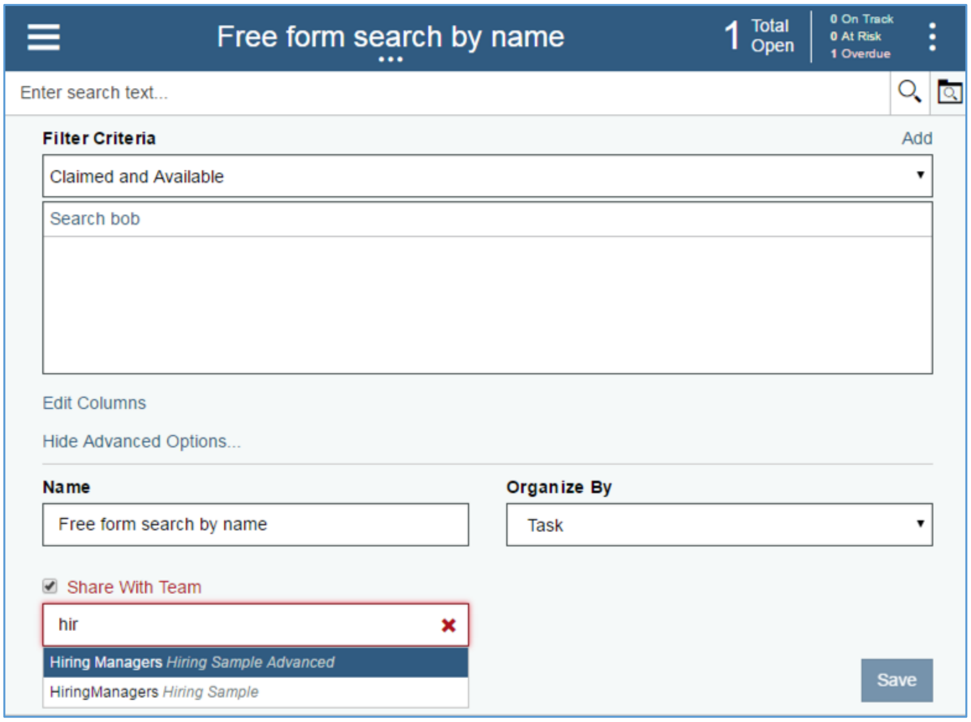


__46. The saved search you created is currently only available to you. We will now show you how to share this saved search with a team. Click the icon to the left of **Free form search by name** and then click **edit** to edit the search.

__47. Click **Show Advanced Options:**



__48. Check **Share with Team** and in the team name start typing **hir** and the team names will filter. Select the first **Hiring Managers** that is associated with Hiring Sample Advanced and then click **Save**.

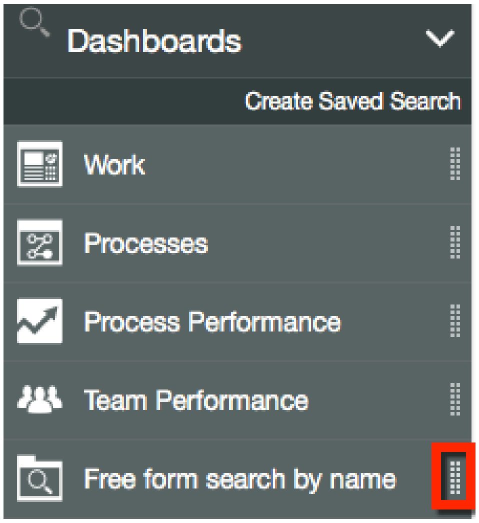


__49. Close the saved search by clicking on the **Work** dashboard in the left hand side navigation pane.

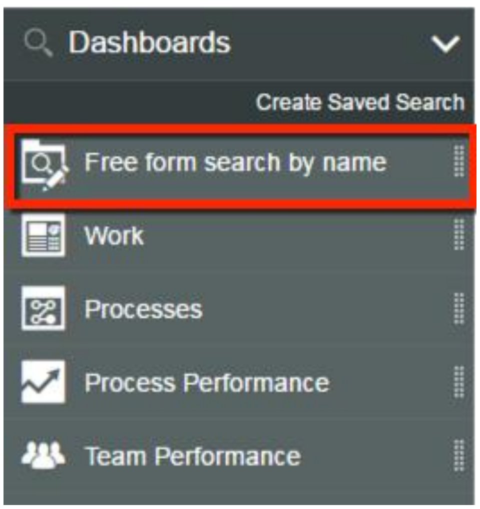
1.6.2 Reorder the dashboards

In this section, you will reorder the displayed dashboards (including saved searches) and set the default start page by moving your favorite saved search or dashboard to the top of the list.

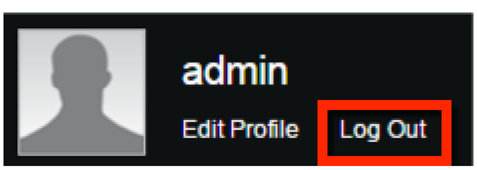
__50. Click and drag **Free form search by name** by using the icon to the right of it. Drag it to the top of the dashboard list.



__51. Confirm that the dashboard list order is as follows:



__52. **Log out** of the Process Portal and then **log back in**. You should now see that "Free form search by name" is the first dashboard shown after logging in.



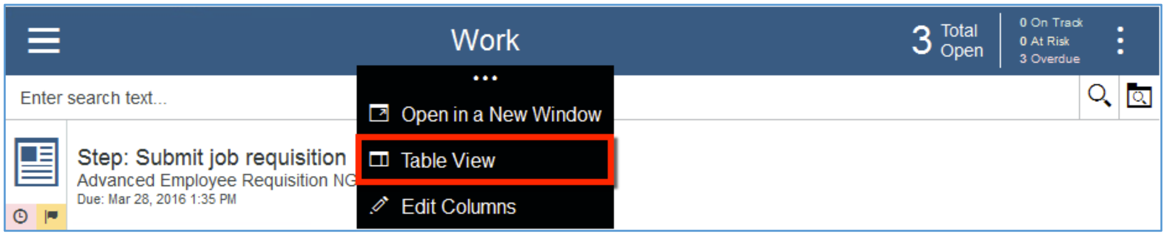
1.6.3 Customize task lists

In this section, you will create a tabular (spreadsheet-like) view of the Work dashboard and will add filter criteria to only show your overdue tasks.

__53. Change the Work list to a tabular view

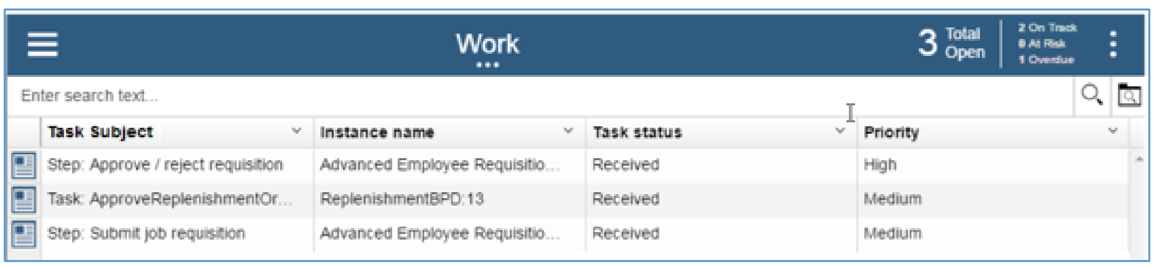
__a. Open the **Work** dashboard if it is not already open.

__b. Under **Work**, click **...** and then click **Table View.**



Important: Table View and List View are always available, and you can toggle back and forth between these two views. Your last view choice will be used when you open another saved search or dashboard. Exception: on small screens (e.g., mobile), a list view may still be shown if there are too many columns in the table view.

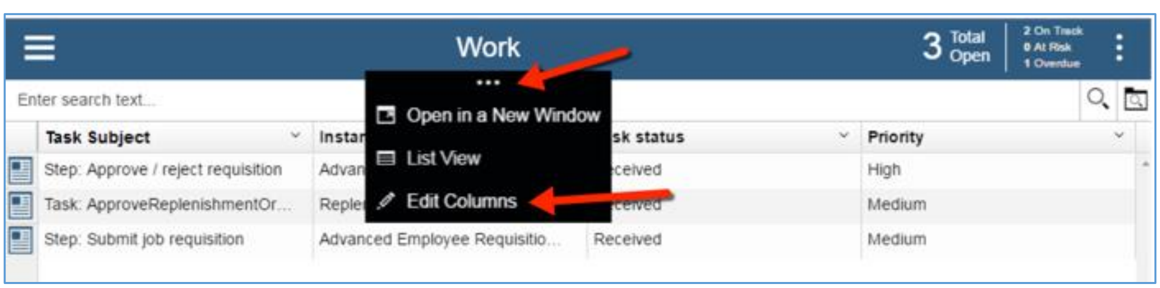
__c. The display has changed to tabular display:



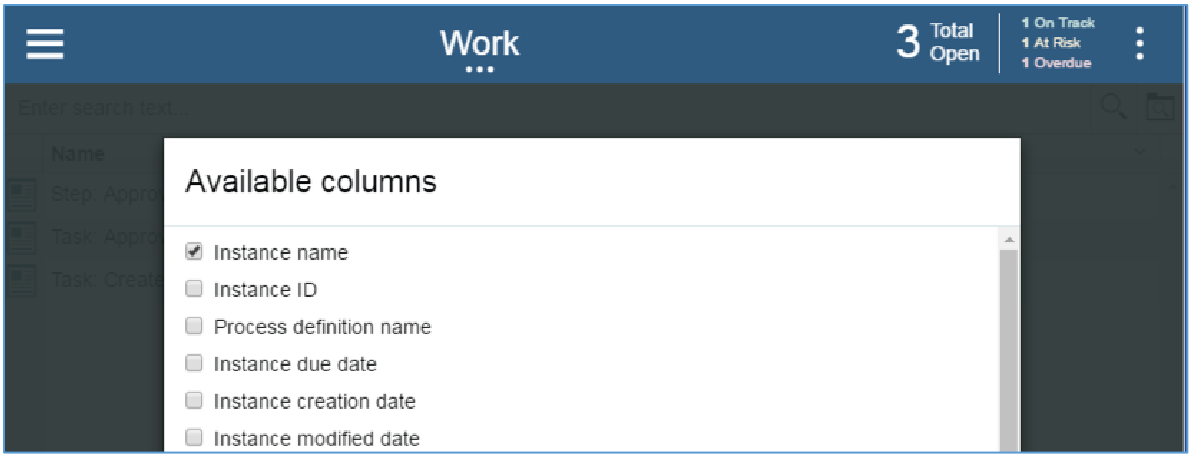
__54. Set Filter criteria and add displayed columns

The Work dashboard comes with a pre-set list of columns and some pre-set Filter criteria. In this section, you will add two additional displayed columns and add another filter criteria

__a. Under **Work**, click **...** and then click **Edit Columns**

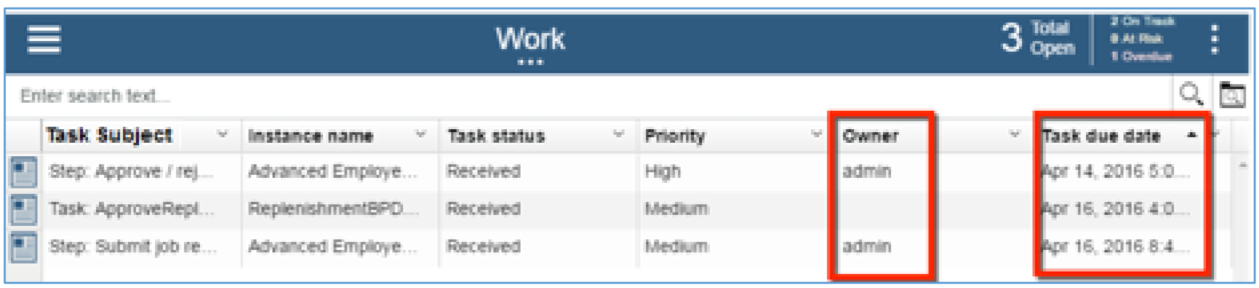


__55. This shows a list of available columns that can be displayed. Scroll up/down to confirm the displayed (checked) columns: **Instance name, Priority, Task Status** and **Task Subject.**

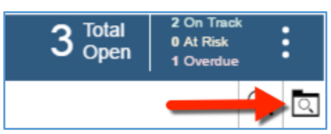


__56. Check **Owner** and **Task Due Date** then click **OK**.

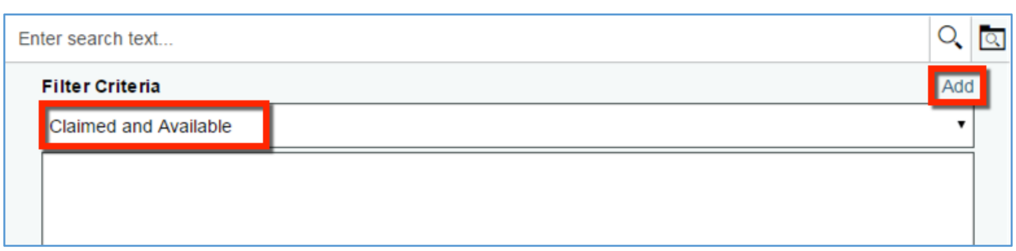
__57. The **Owner** column and **Task due date** should also be displayed and there should be instances with your username, **admin**, in the owner column.



__58. On the right side of the screen, click the Edit Saved Search icon:



__59. Notice that the Work saved search has a Filter Criteria of “Claimed and available” – which refers to the status of the tasks.



__60. Add a filter criterion for Owner using the following steps:

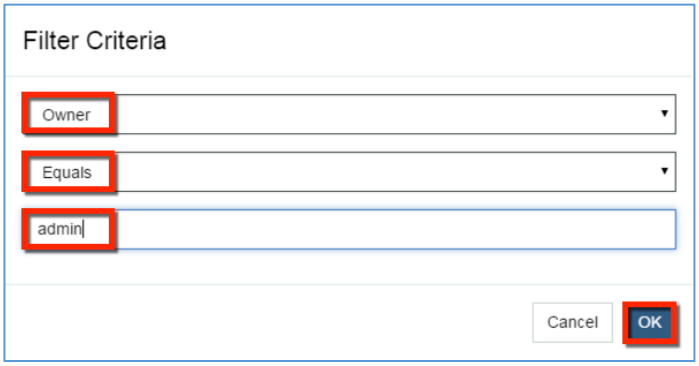
__a. Click **Add** (as depicted above).

__b. Select **Owner.**

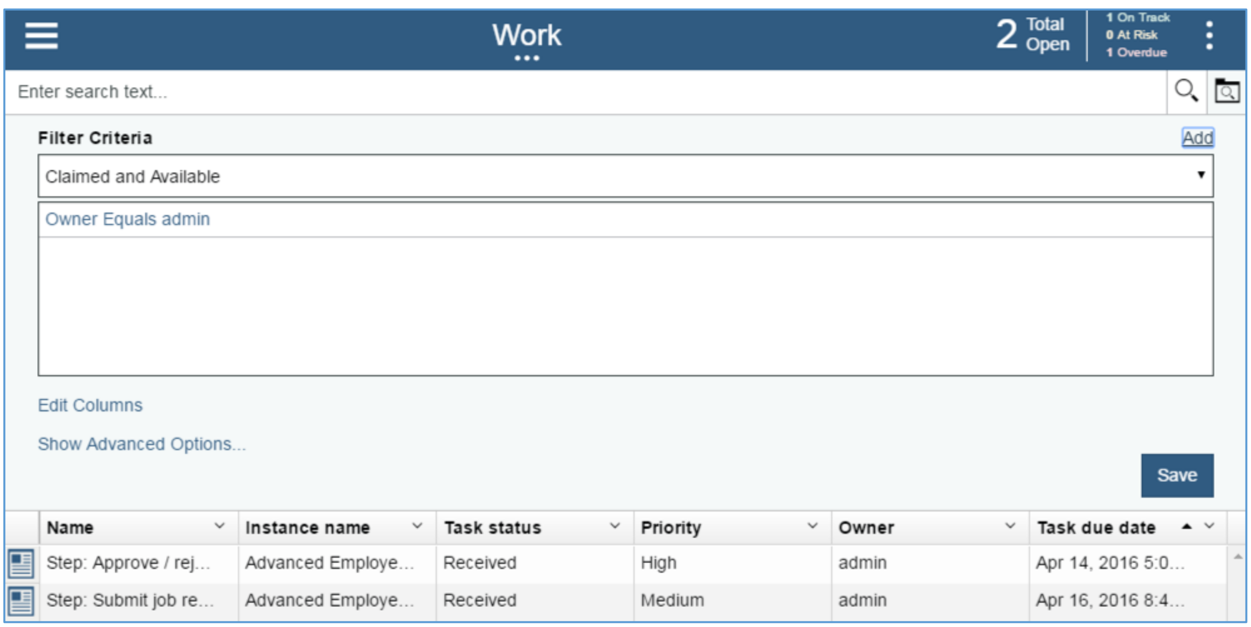
__c. Select **Equals.**

__d. For Enter text…, enter your login id, which is **admin**.

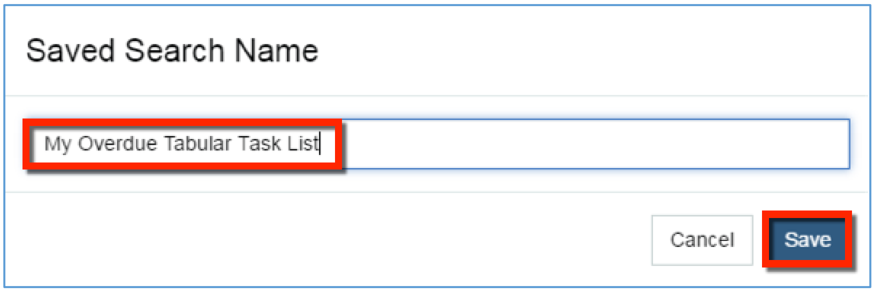
__e. Click **OK**.



__61. Confirm that the task list refreshed and only shows items for which you are the owner. Click **Save**.



__62. Save this search by clicking **Save**. Note that you will prompted to enter a Saved Search Name because the Work dashboard is a default dashboard and thus not editable. For name, enter **My Overdue Tabular Task List** and then click **Save**. Shortly, you will add the overdue part to this saved search.



__63. Add another filter criterion to only show tasks before today using the following steps:

__a. Click **Add** (as depicted above).

__b. Select **Task due date.**

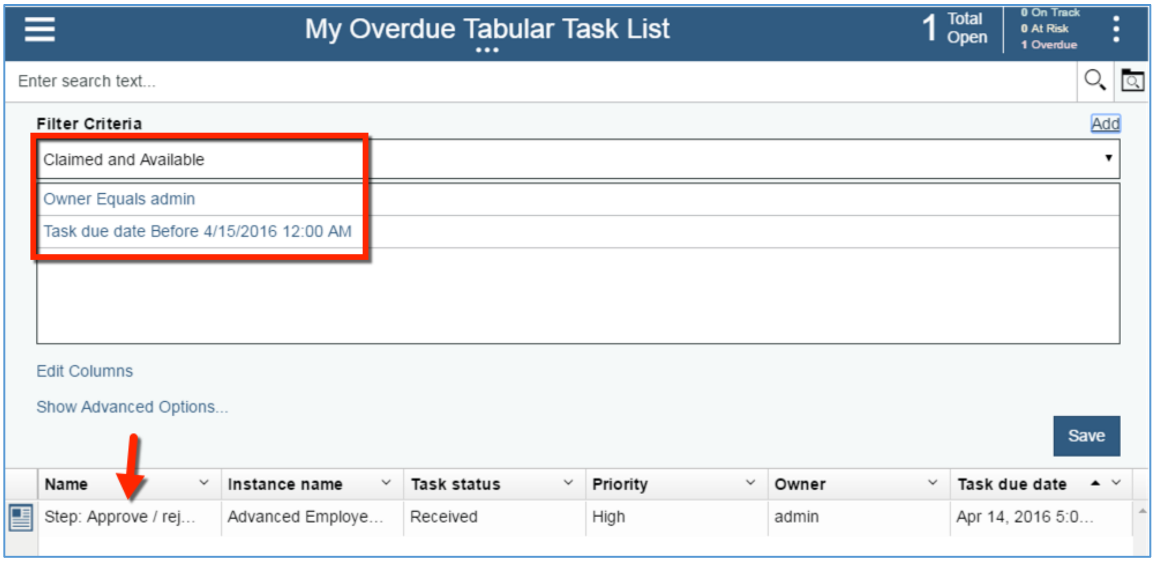
__c. Select **Before.**

__d. Click the calendar dropdown icon at the right, to select **<today's date>.**

__e. Click on the time field next to the date. Select **12** for hours, **00** minutes, and select **AM**. You can press tab between the fields.

__f. Click **OK**.

__64. You should now see three filter criteria in this saved search. There should now only be one task displayed – the task we set as overdue earlier.



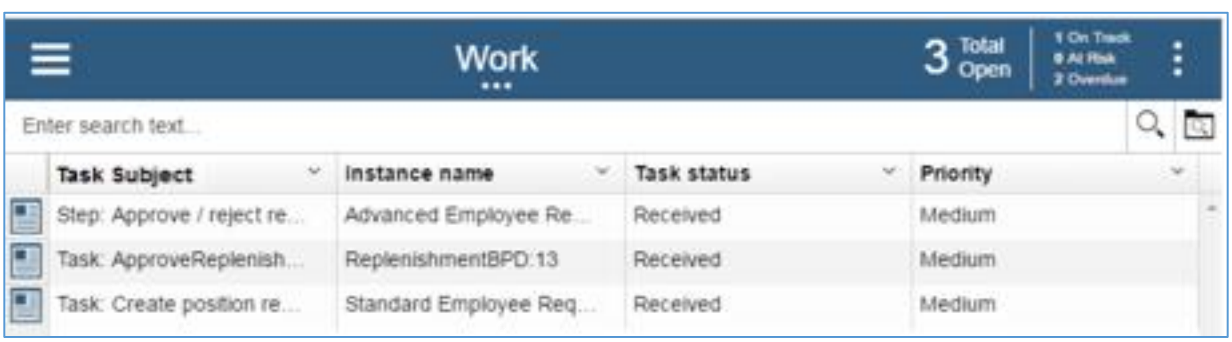
__65. Click **Save** to save your changes.

Optional step: change the due date to tomorrow of one of the above tasks or reassign back to the team (and thus, implicitly changing the due date) and verify that the displayed tasks change accordingly.

1.7 Sort and change order of columns in Tabular View

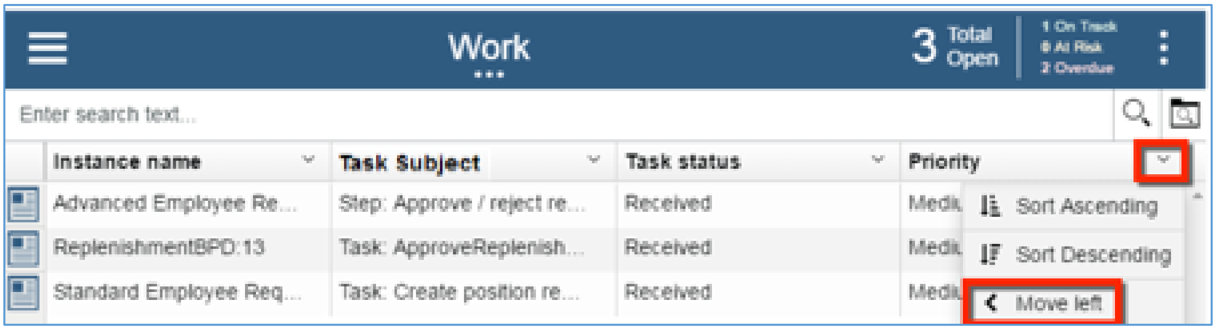
In this section, you will rearrange the columns in tabular view and sort by columns.

__66. Open the **Work** dashboard. This should appear in tabular view because the last view that was open was Tabular.

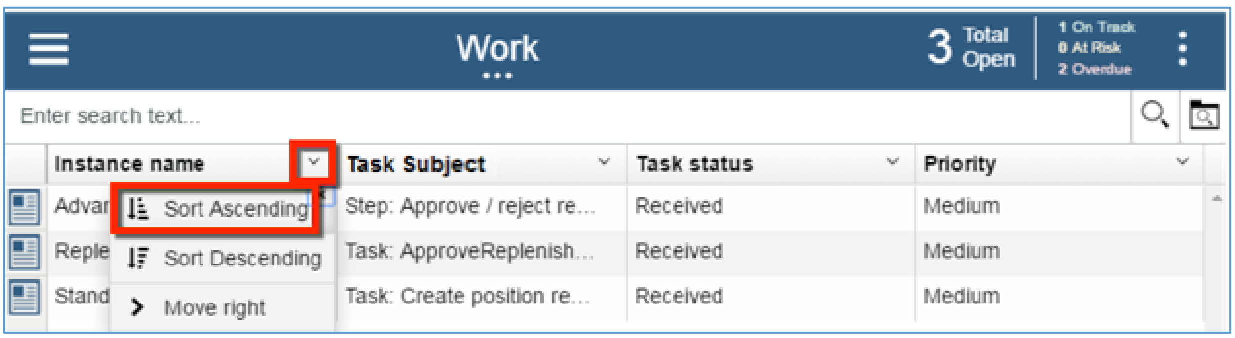


__67. Move the **Task Subject** column to the right of Instance name by holding down on the column name, **Task Subject**, then dragging to the right of Instance name.

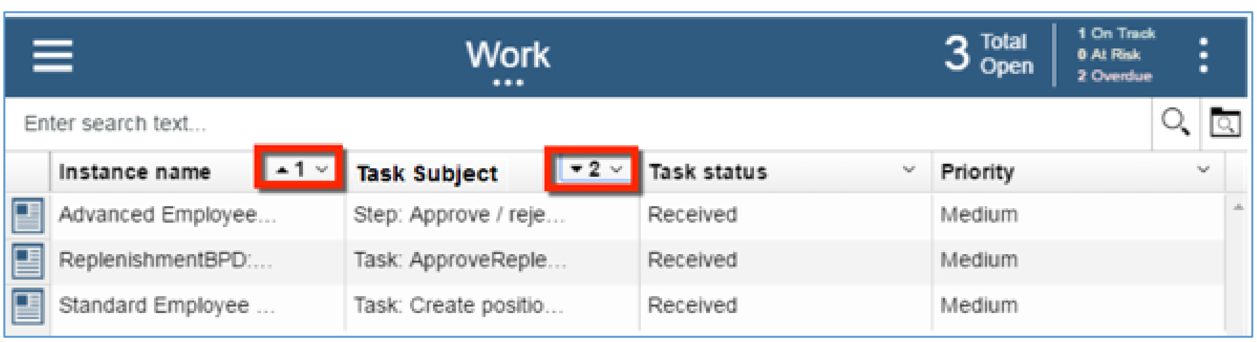
__68. An alternative way or reordering the columns is to use the column controls. Move Priority to the right of Task Status by clicking the **down arrow** to the **right** of **Priority** and then select **< Move left.**



__69. Sort Instance Name in ascending order by clicking the down arrow to the right of **Instance name** and then select **Sort Ascending.**



__70. Similarly, sort **Task Subject** in descending sort order. Notice that the two columns used to sort now show their sort order and which one is the first sort column and second sort column. As expected, Instance name is the first sort column and Task Subject is the second sort column. You can use up to three columns for sorting.



This concludes the lab!

1.8 Summary

In this lab, you have explored the ready-to-use Process Portal that comes with IBM Business Process Manager. You should now understand how the Process Portal allows users to focus on the most urgent tasks at hand, and how it also offers an environment for interacting with business process instances and completing tasks. You also experienced the built-in dashboards, which offer a powerful visualization of the process health and ways to take action to improve process effectiveness.

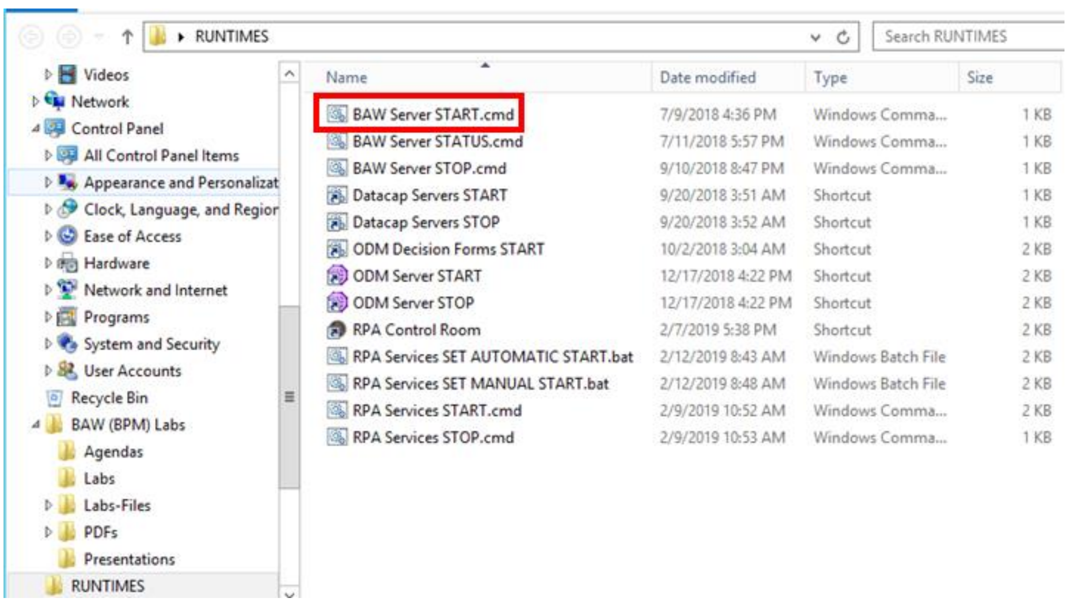
1.9 Lab 1: Appendix

Start Workflow Center

Work Center

Work Center is a component of IBM Business Automation Workflow that provides a shared repository for development, testing, deployment, and overall business process management governance. We will be connecting to Workflow Center as we design the process to iteratively develop and test our process design.

- Locate the **RUNTIMES** shortcut folder on your desktop and double-click to open it.
- Double-click **BAW Server START** as shown.



Wait for the start script executing in CMD window.

Note: when the CMD window closes down, it will still take some time for the Workflow Center to be operational.