



Csaba's Advanced Email Notification for IBM Business Automation Workflow

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Agenda

1. **OPTIONS** – email notification for tasks in IBM BAW
2. **DEMO** – how to use Csaba's Advanced Email Notification ?
3. **EXPLAIN** – how does it work?

1. OPTIONS – email notification for tasks in IBM BAW



Email Notification Option 1

Use built-in feature

Pros

Documented setup

Users can opt-in or opt-out by
modifying their profile

Cons

All or Nothing

Mail Template is not modifiable
officially

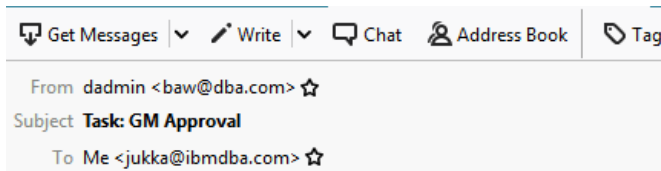
Notifies only when task received

Requires sysadmin and restart
for initial setup - by configuring
100Custom.xml

Enabling email for Process Portal

Follow these instructions in Knowledge Center
tasks:

https://www.ibm.com/support/knowledgecenter/en/SS7K2U/tadm_portal_email.html



Klis Csaba

The profile card for Klis Csaba includes a photo, a 'Change Avatar' button, and a close button. To the right are input fields for 'Job Title' (containing 'IBM Technology / Automation Technical Sales'), 'Phone Number', and 'Email Address' (containing 'csaba@ibmdba.com').

Portal Preferences

Language English

Calendar Gregorian

Open Task in a New Window Default (No)

☒ Show confirmation when I open an unclaimed task

☒ Send me an email when I have a new task assignment

☐ Send me an IBM Connections notification when I have a new task
IBM Connections is not configured for activity notifications.

☐ Show a confirmation message when I stop following a process

Display a notification when

☒ A new task is assigned to me

☐ A new task is assigned to my team

☒ An activity is updated

☒ I'm mentioned in a post

Cancel

Save

Email Notification Option 2

Implement within process logic

Pros

Fully customizable - Do whatever you need with the power of Process Designer

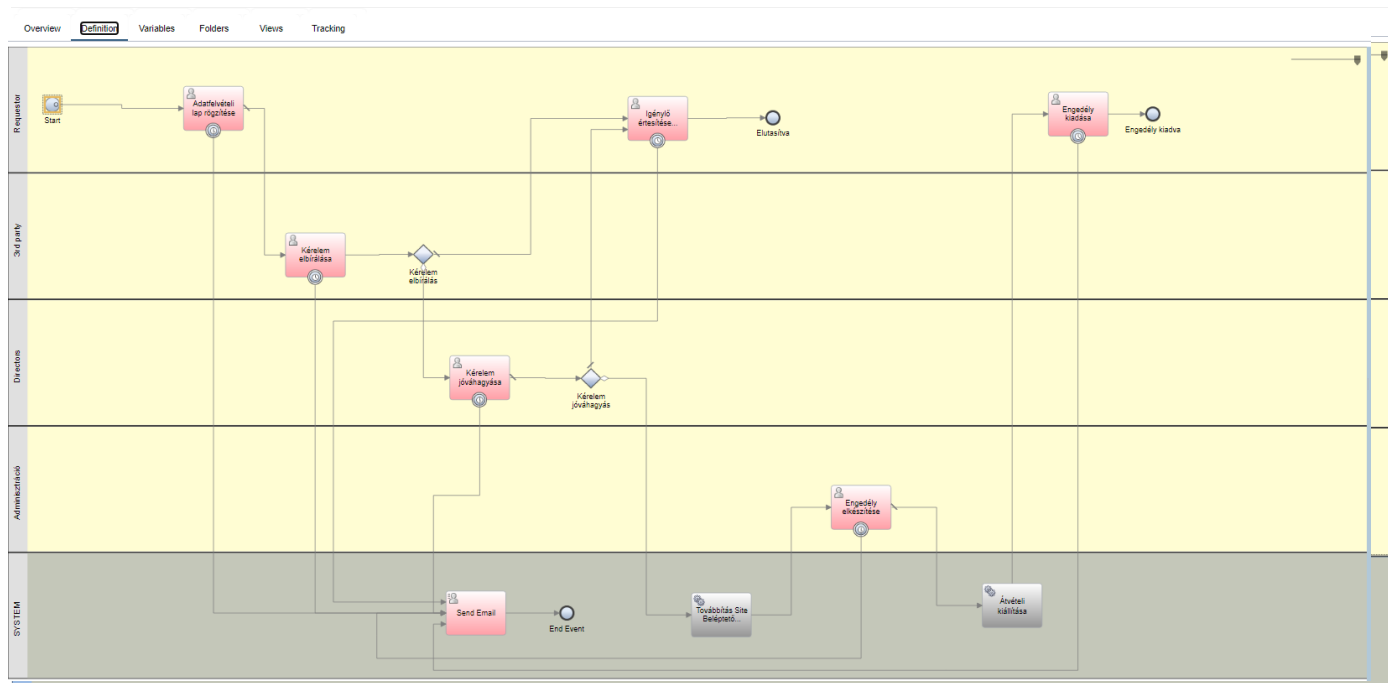
Cons

Intrusive – needs to modify PA and Process model

Requires a developer to implement / customize.

Can mess up Process model – becomes hard to read and understand

Implement as escalations in process model using intermediate timer events



Use *Csaba's Advanced
Email Notification* asset
(or just take the idea)

Pros

Universal, non-intrusive

Configurable by processes

Configurable notification events

Template-based

Csaba's Advanced Email Notification

Common requirements from clients / partners:

- Universal, non-intrusive
- Configurable by processes
- Configurable notification events – not only on task receipt, but also for at risk and overdue statuses
- Template-based

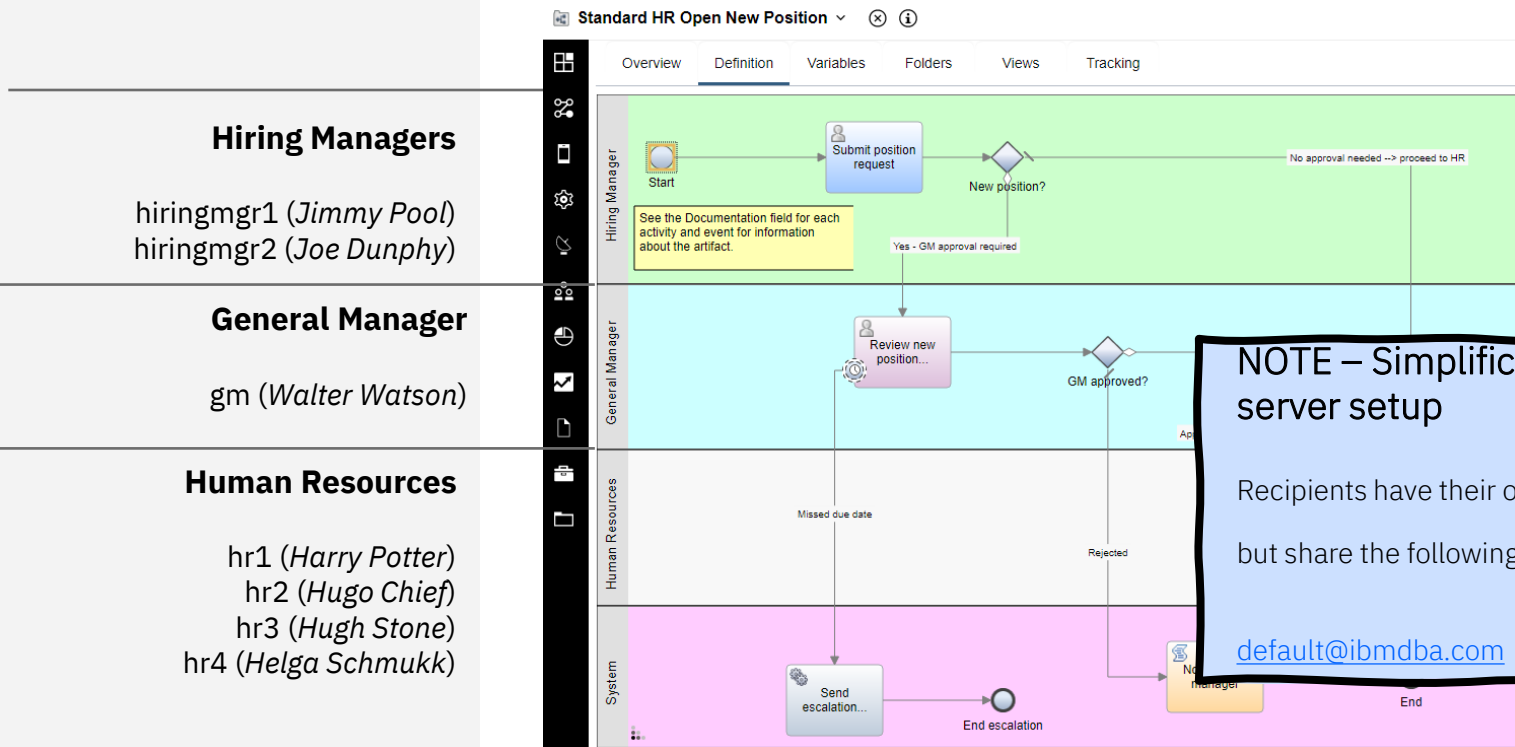
2. DEMO – how to use Csaba's Advanced Email Notification ?



Set up email notifications for Hiring Sample PA

Sample application with IBM BAW

https://www.ibm.com/support/knowledgecenter/SS8JB4_20.x/com.ibm.wbpm.workflow_main.doc/topics/cbpm_tutorial.html



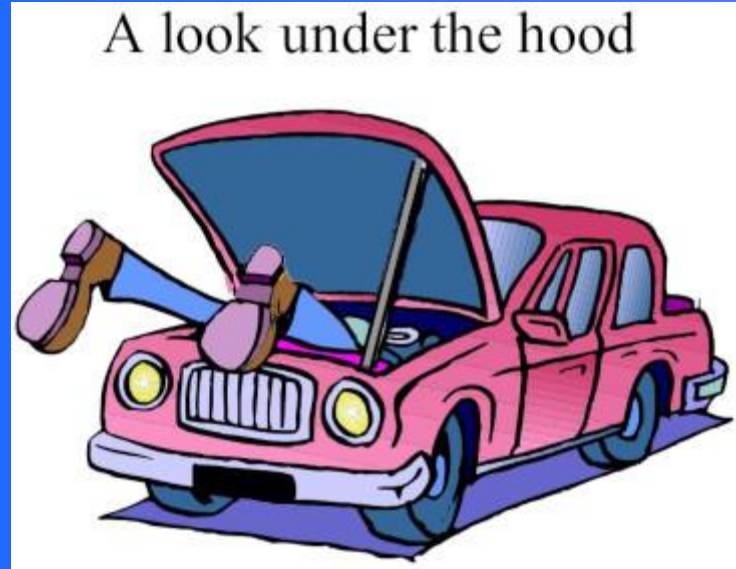
NOTE – Simplification on mail server setup

Recipients have their own mail addresses,
 but share the following mailbox -

default@ibmdba.com

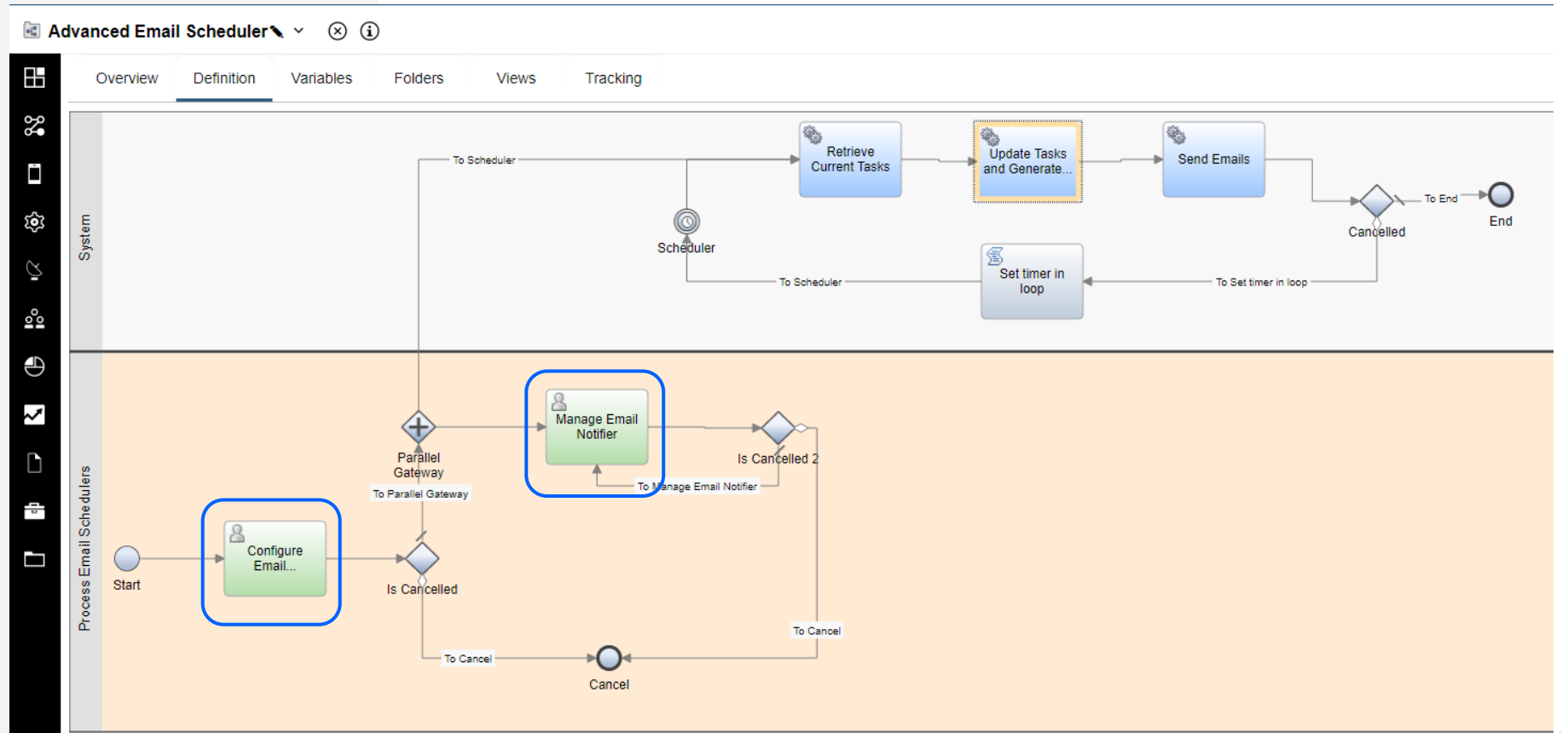
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3. EXPLAIN – how does it work?

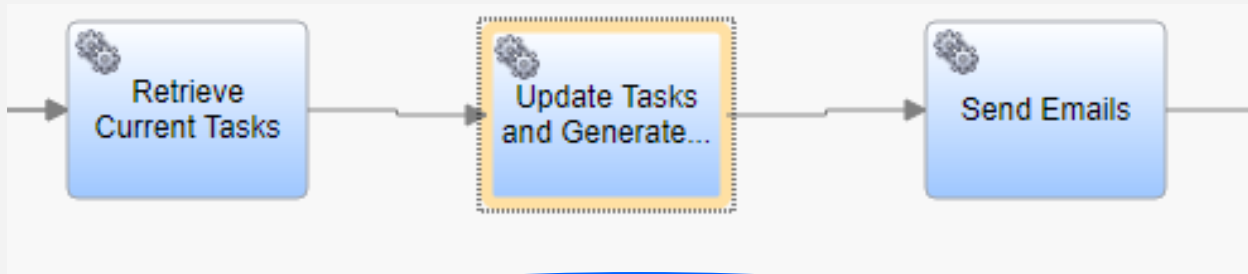


How it works?

Advanced Email Scheduler process



Advanced Email Scheduler process



Active and Received tasks

State of tasks

Tasks to send email

tw.local.currentActiveAndReceivedTasks
(list of **TaskDesc**)

Holds task attributes

TWSearch is used to get the list of tasks and **tw.system.findTaskByID** to enrich task data.

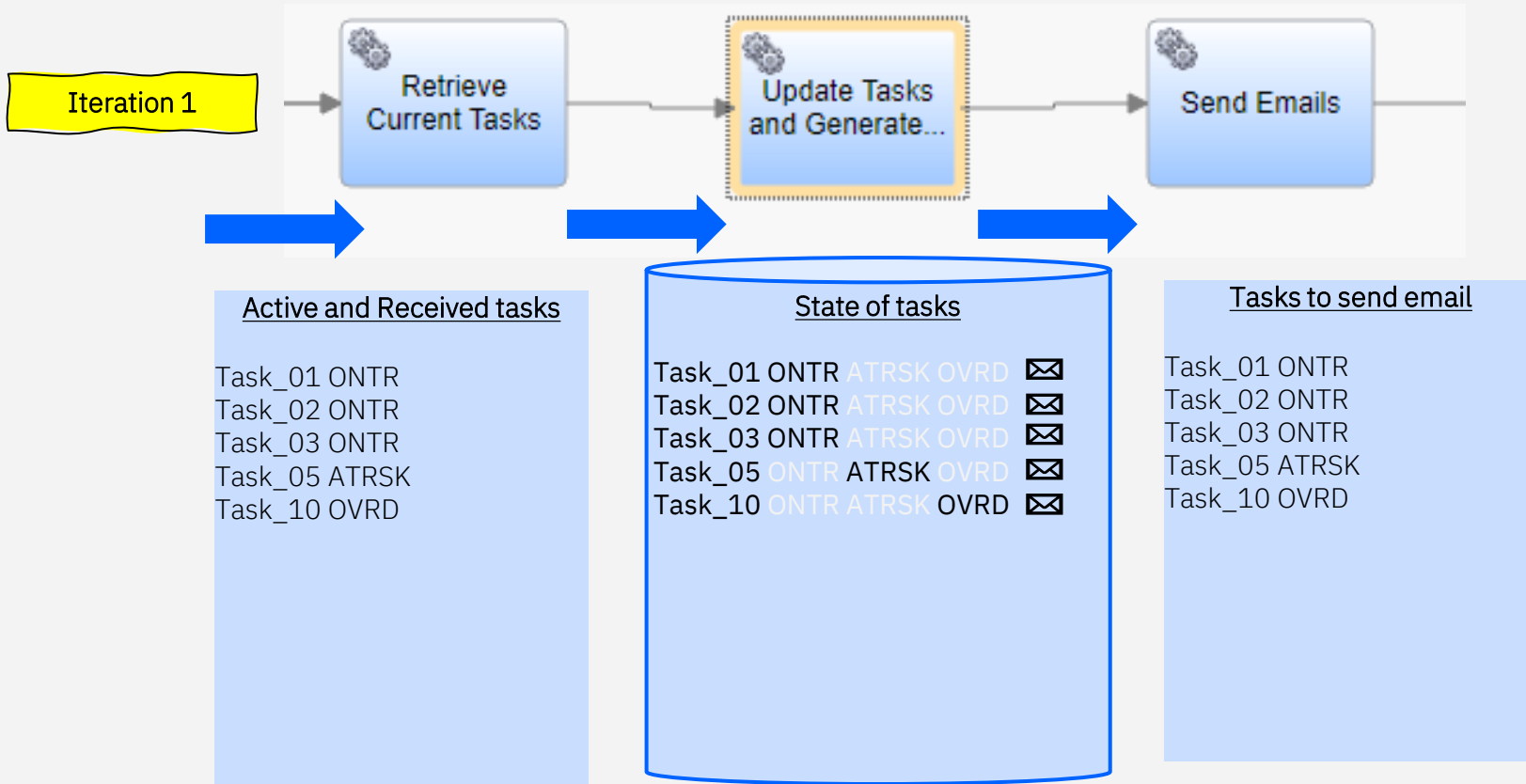
tw.local.taskStatuses
(list of **TaskEmailStatus**)

Holds notification state for tasks – if an email was already sent for a risk state or or not.

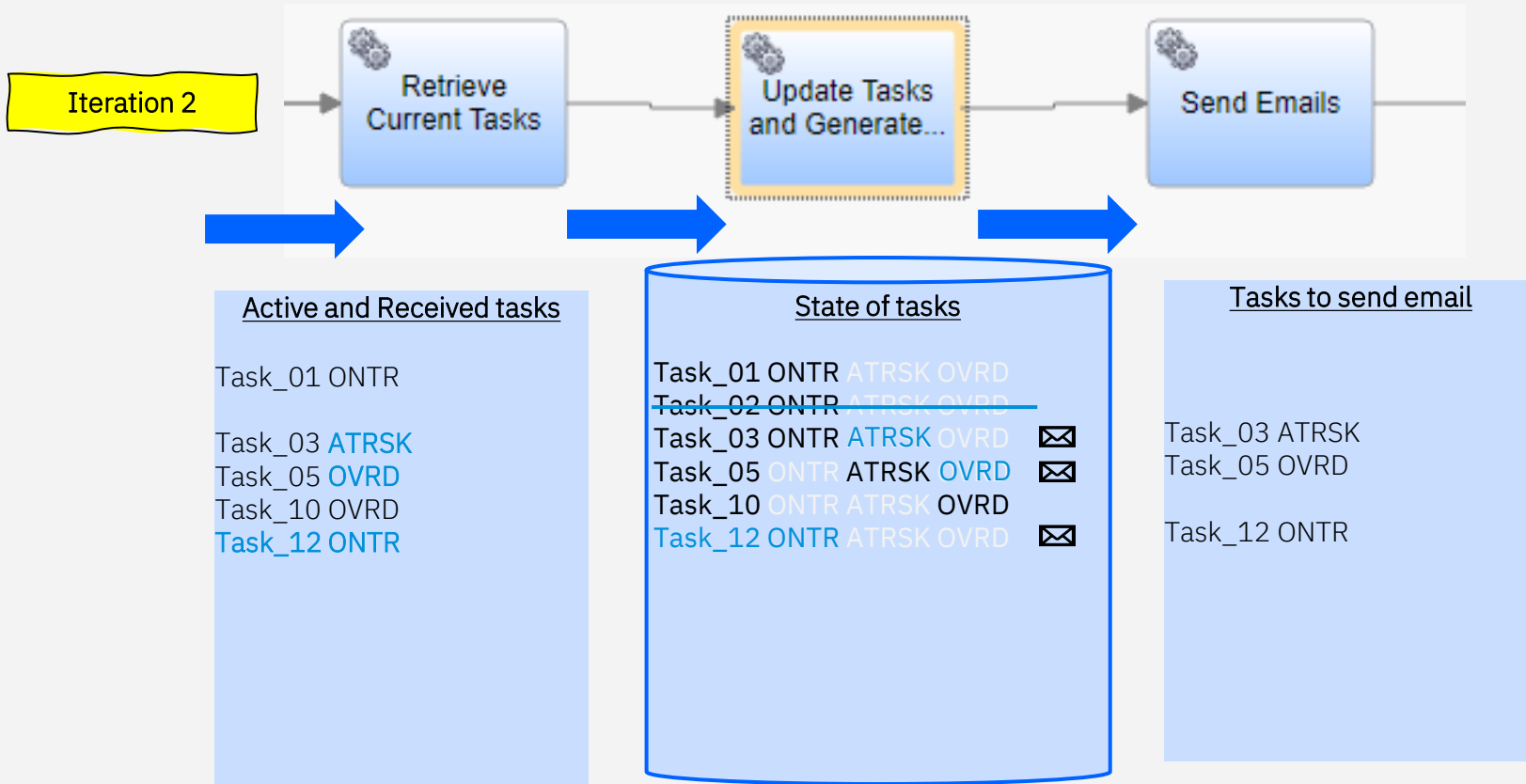
tw.local.emailTasks
(list of **TaskEmailData**)

Holds task attributes and parameters for task – email address.

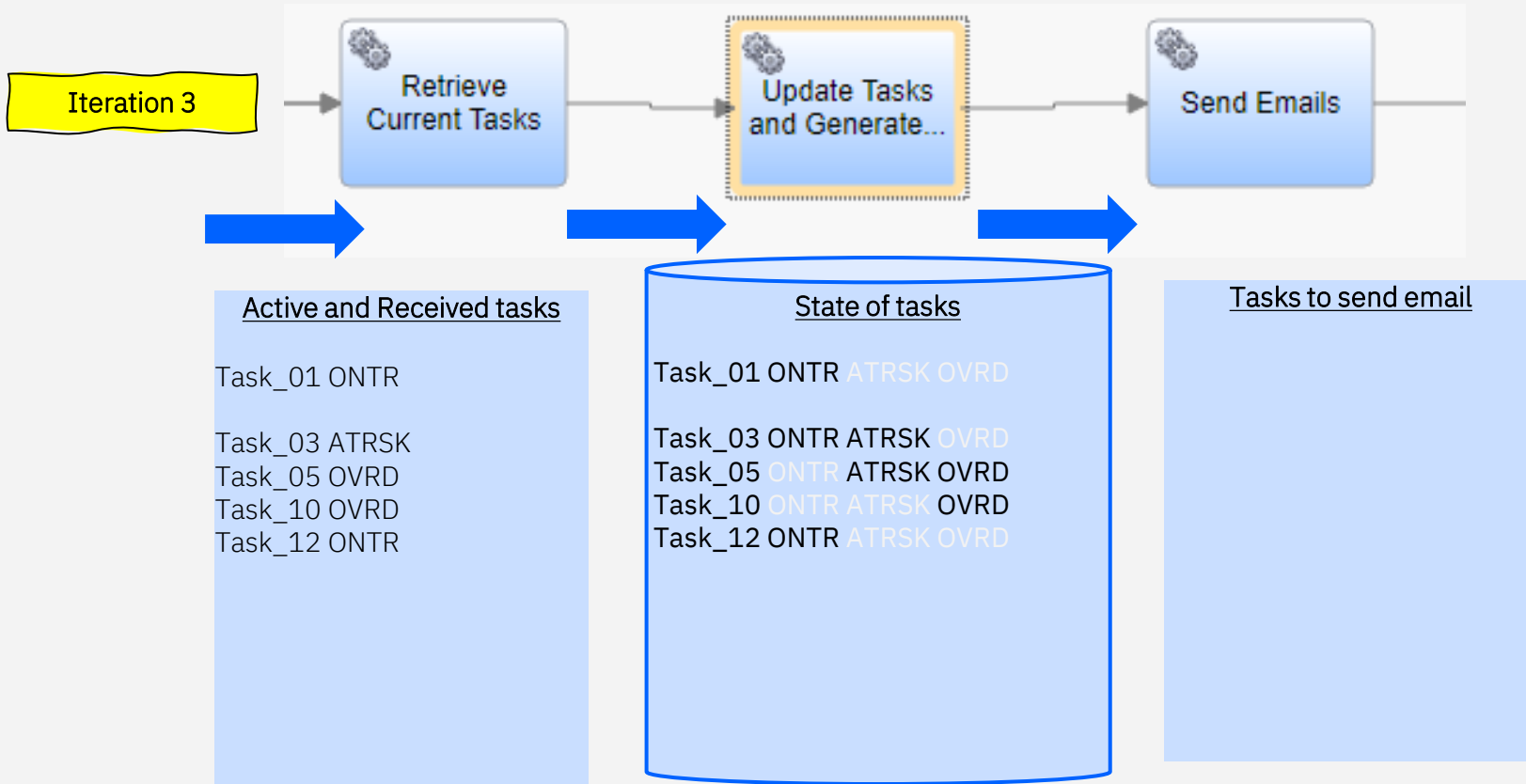
Advanced Email Scheduler process EXAMPLE



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Cons Worth knowing

Scheduler-based, series of operations in each loop:

- retrieve tasks,
- process tasks – identify tasks which need email notification
- send email in batch

Careful with frequency

- too short timing can cause noticeable performance overhead
- longer periods can miss tasks with short deadline

*** Always can improve with new features / ideas :D



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