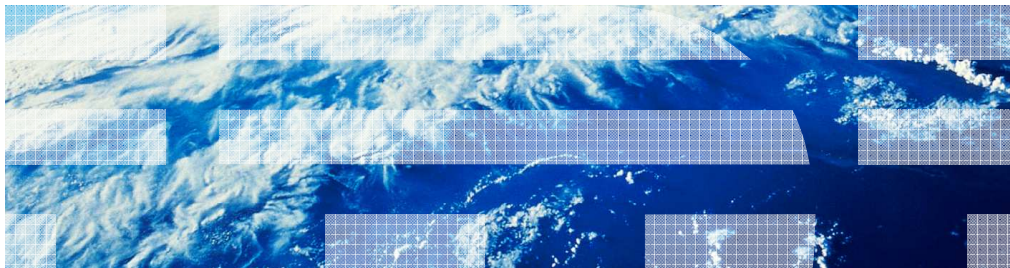# Business Process Management
IBM Business Process Manager V8

Introduction to the Process Portal

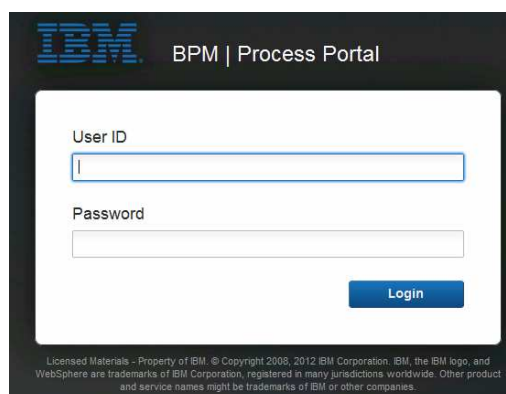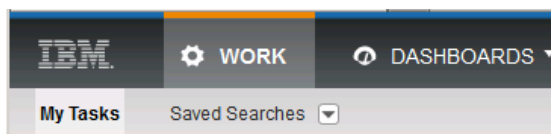At this point in your learning you should be familiar with the key concepts, capabilities and basic architecture, for BPM Standard and Advanced.

This presentation will take you through a quick tour of the Process Portal and highlight some features that you should be aware of before embarking on your first BPM project with version 8.

Starting with a brief introduction that highlights the concepts that are introduced into the Process Portal with version 8, you will then be taken on a tour of the new user-interface.

This will provide you with the basic roadmap for navigating the Process Portal.

Following the tour, there are detailed discussions of key features and how they work.

The BPM Process Portal has been redesigned to provide a highly collaborative work experience with increased social capabilities.

With the new Process Portal there are features for requesting help from experts, adding comments and attaching documents to a task, and subscribing to process instance streams.

With the new and improved profile feature you can add a photograph, contact information and configure how you are notified of events.

My tasks

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The first thing you'll see when you open the new Process Portal is the task list on the left and a list of business processes that you can launch, on the right. The information displayed on the right is determined by the selection in the blue toolbar. In this picture the Launch button is selected.

Moving over to the task list section on the left, you'll see a list of the tasks that Tom T. has already started working on or that he can start working on when he is ready to start a new task. The tasks are grouped based on their estimated time for completion. The estimate is based on the criteria specified in the task definition. There are six categories. They are: Overdue, At Risk, Due Today, Due Tomorrow, Due This Week, and Due Later.

The at risk category is for those tasks that are at risk of being late.

Each row represents a task. The task header information comes from the task subject and narrative in the properties of the task definition. On the right end of the row is the due date and below that you will see either the potential owner or the owner of the task. In the second row, the potential owner is anyone that is a member of the "Operators" participant group. This is an indication that it is waiting to be claimed.

Selecting the row background will expand and collapse the row details. The last row displayed in the screen capture has been expanded to show the task details. The details that can be displayed are configured in the task definition. At the top of the page there is an "expand all" button that is used to expand and collapse all of the rows with one action.

To the left of the "expand all" button are the filters used to display either the completed tasks or the open tasks.

Just above that is the search bar, which is used to search for specific tasks or tasks that are related by some keyword. The keywords can be part of the name, the narrative or attributes of the task. To be used in the search, the attributes must first be exposed using the Process Designer.

Task details

As was mentioned on the previous slide, the information displayed in the task list is configured in the properties of the task definition in the Process Designer.

The title on the row comes from the subject of the task header and the description comes from the narrative. The task header is found in the implementation properties of the task.

To display business data details in the Process Portal you go to the variables tab.

Select the variable you want to expose and then check the "Available in Search" option in the "Business Data Search" section.

Claiming a task
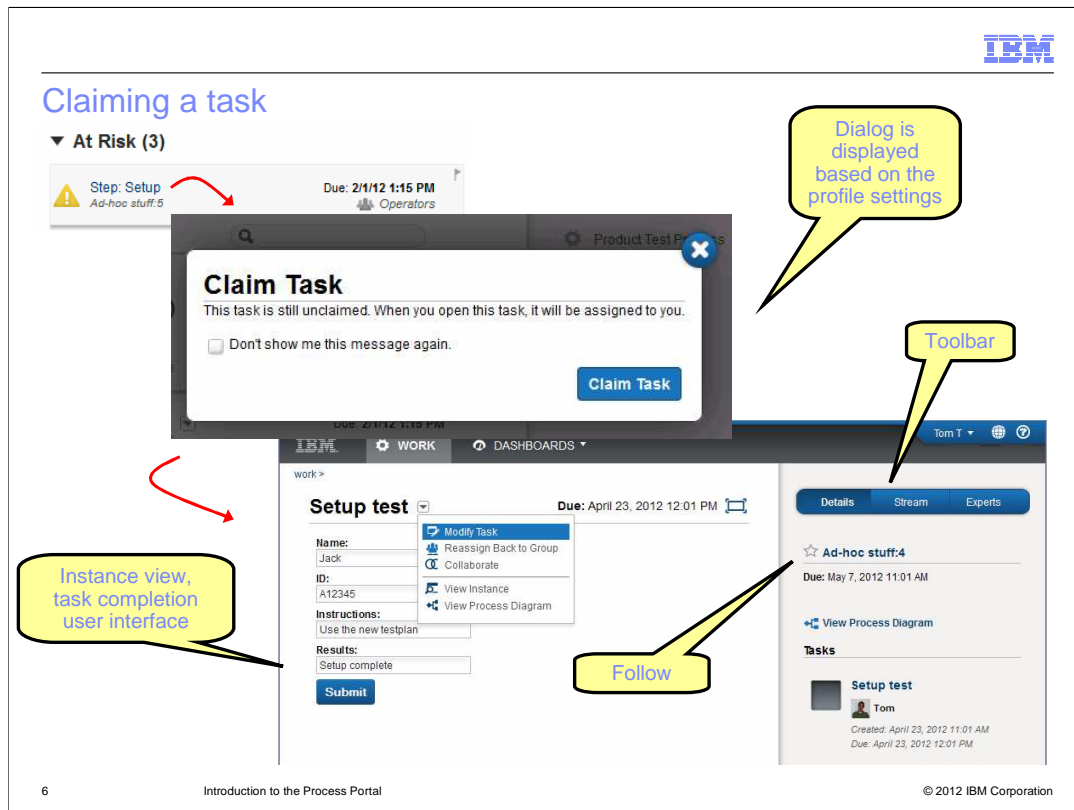
To work on a task, select the title of the task. By default you'll be presented with the "Claim Task" dialog. If you don't want to see this dialog you can configure your profile so that it won't be shown.

When you claim a task, the task completion user_interface is displayed. The task completion user_interface displays the coach view on the left and task details on the right. Notice that the blue toolbar on the right has changed. The available options are now details, stream and experts. Each of these will be discussed in more detail on subsequent slides.

There are several options available from the task completion user_interface. From the pull down menu by the task title, you can modify the task, reassign it back to the group, start a collaboration session, navigate to the process instance view and view the process diagram.
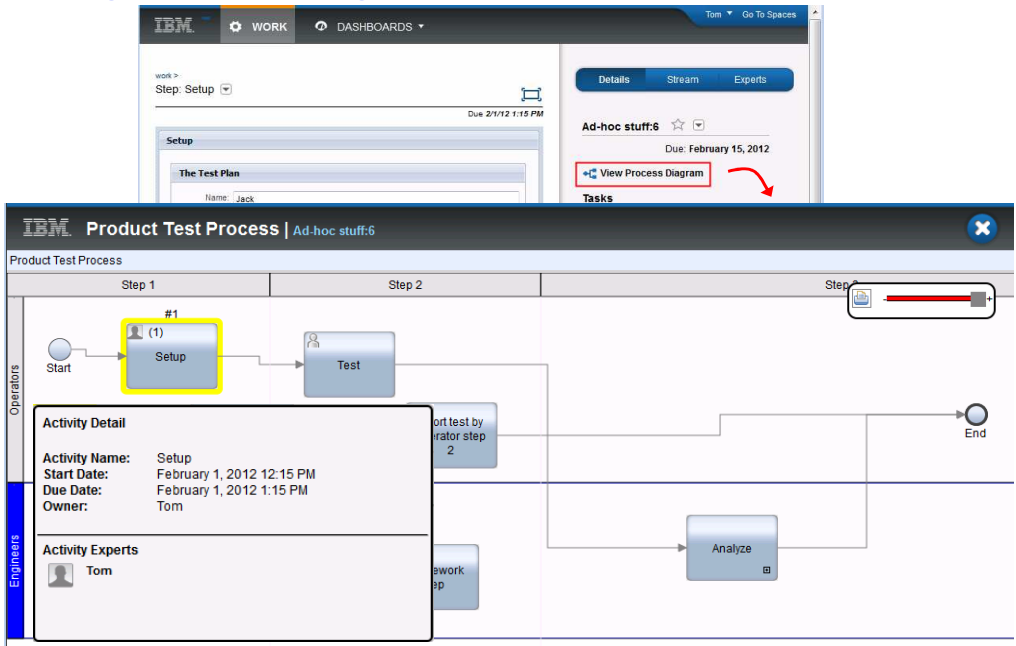
With the modify task option, you can reassign the task to a specific user.

The collaboration option is only available with the new coaches. Selecting this option you can start a real time collaboration session with an expert. In a collaboration session, both parties can see and edit the coach at the same time.

By selecting the star, near the top of the right section, you can indicate your interest in following the business process instance. More on this when streams are discussed.

Viewing the process diagram

You can view the process diagram from several places. When viewing the process diagram notice the x in the upper right corner. The diagram viewer is a popup and to close it you need to use the x.

While viewing the process diagram, you can select the currently active task or any task that has already been completed along the path, and see the details as shown here. The currently active task is highlighted with a yellow border. You can zoom in and out and navigate into nested sub-processes or linked processes.

Collaboration comes in a couple of forms. Both forms use experts. There are two kinds of experts.

The first group of experts are users that have already completed the task. This is a dynamic list of experts based on real time history.

The second group of experts are those that are explicitly defined in the definition of the task in the assignments property.

Hovering the mouse over the expert name will display the links for the two different kinds of collaboration, @Mention and Collaboration.

The @Mention is a way you can post a message or question to a specific user. This will cause a popup to be displayed on the screen of the person you are "mentioning" and then the message is posted to the process instances stream. The stream is a discussion area for the process instance, like a bulletin board. If do not want to see the popup messages, you can suppress the popup notification in your profile configuration.

The Collaboration link will initiate a real time interactive session with another logged on user where you can both see the coach and make changes to it. When you receive a popup request there is a link that will take you to the task completion user_interface of the task you'll be working on.

Details, Streams and Experts
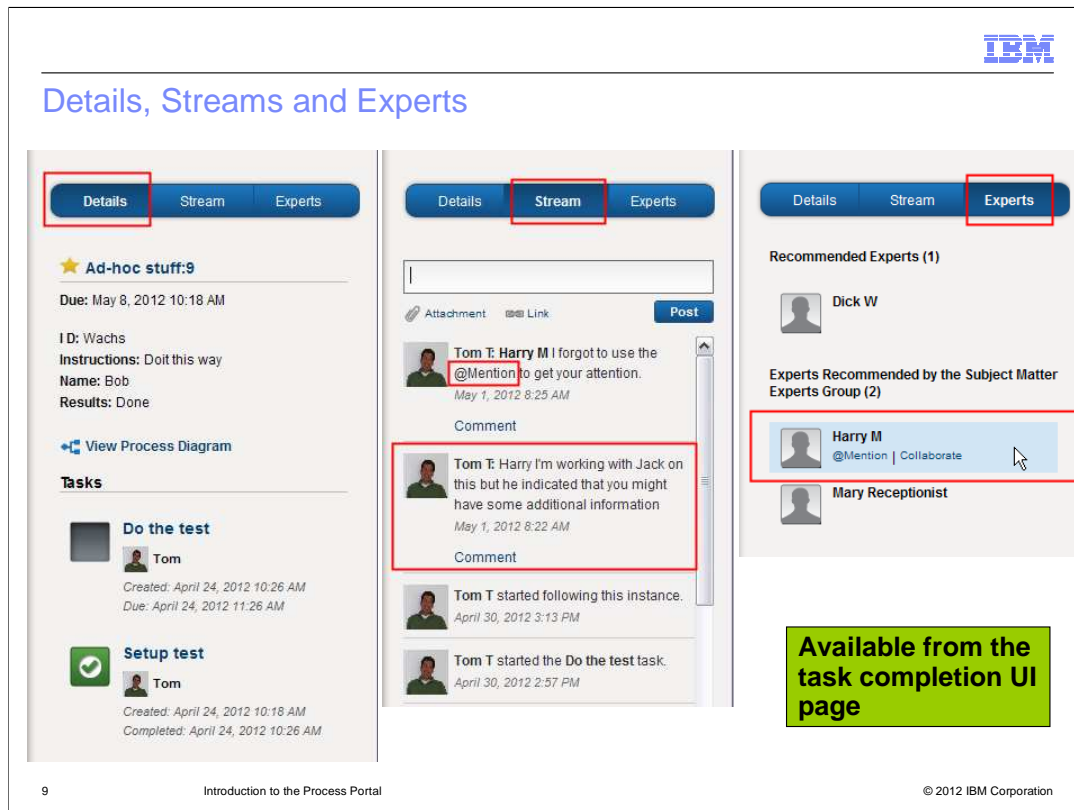
From the Task Completion user interface you have access to the task details, the business process stream for the current task, and the experts.

Looking at the details, you can see that the current step is at the top of the list and is being worked by Tom. The previous step was the Setup test, and has been completed. The yellow star indicates that Tom is following this business process instance. The name shown for the business process instance is the default name and can be customized in the Process Designer.

The Stream is a place where you can have and record a conversation between multiple participants in the business process. You can post a comment, attach a file, or add a link. Only people that are involved in the business process have access to the stream. You can invite others to join in by using the @Mentions option. This will send a notification along with a link to the stream to the person you are inviting. Once a person has been invited they can choose to follow the stream if they want to remain active in the conversation.

The Experts pane is where you have access to other participants that are not directly involved with the task you're working on. As described previously, there are two groups of experts. The recommended experts that have previously completed the same kind of task you're currently working on, and those that have been assigned to be the experts by the subject matter experts in your group.

@Mentions

- Jack notices from his task list that he is mentioned in *Ad-hoc stuff:4*
- Selecting the link will take him to the *business process instance* view
- To *follow* this business process, Jack selects the star. It will turn yellow.
  - After this, the business process will show up in Jack's *Following* list

Switching back to the task completion user-interface, the @Mentions and following features will be discussed.

In this case Jack was off line for a while and didn't see the popup indicating that he was mentioned in a conversation. He checks his @Mentions area and sees that Tom invited him to collaborate. It is probably too late for the collaboration session but Jack wants to see what's going on anyway. In the @Mentions there is a link to the "Ad-hoc stuff" business process, instance four. Jack navigates to the stream for Ad-hoc stuff:4 by selecting the link. Here he can catch up on the conversation and select the star to start following it. Once he has started following the conversation, he can quickly return to it by selecting the Following tab in the toolbar.

User Profile

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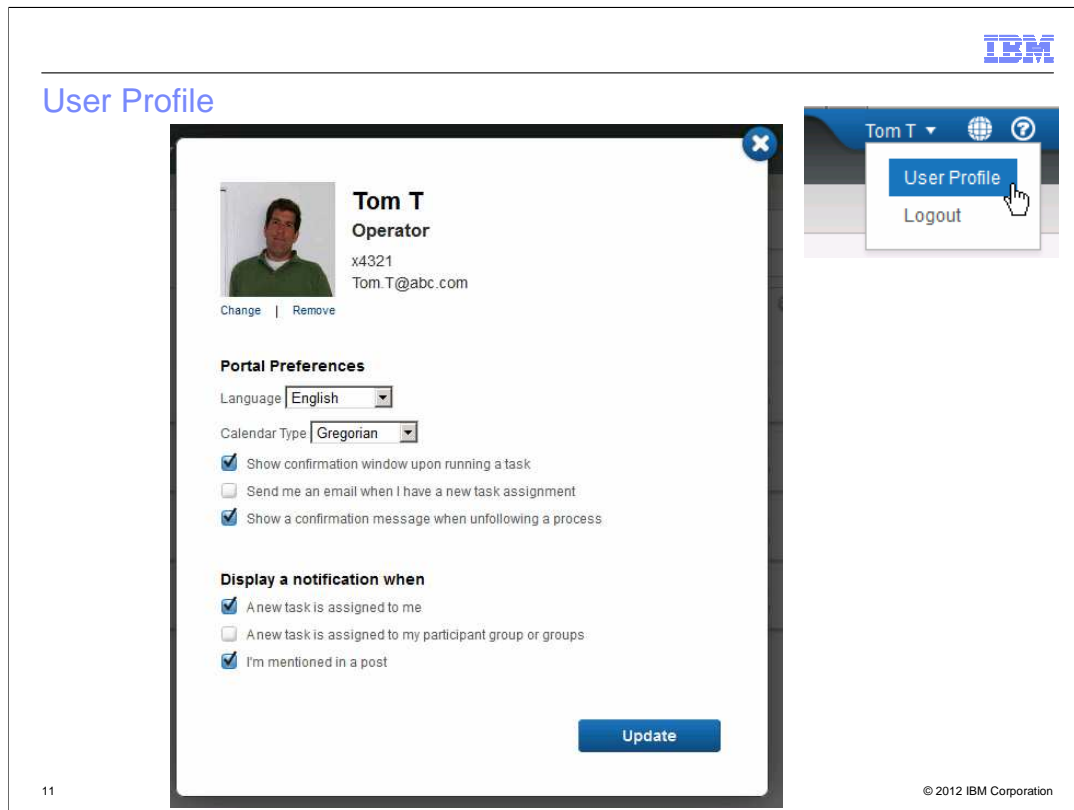
To access the user profile, use the drop down menu next to the user name in the upper right part of the browser window.

The first thing you'll see is the profile picture which is optional and can be changed at any time. The user information, such as title and contact information comes from the user registry and can be managed using the bulk user attributes in the Process Admin console or by directly editing the values in the profile. If you hover the mouse over the email address, telephone number or title, the edit pencil is displayed, indicating that you can edit the field.

The rest of the profile is for configuring your preferences. Things such as language, calendar type, and notifications. This is where you can choose not to receive a confirmation popup every time you claim a new task.

Bulk user attributes

This slide will discuss Process Admin console.

The personal information about a user can be set using the Bulk User Attribute Assignment function.

The attributes of interest are, title, phone-number and task email address. The bulk user attribute is useful when you want to set the title for a group of people all at the same time. In this example there is a participant group call Operators and all the members of that group have the title of Operator.

Saved searches

- Previously 'saved queries' were created and managed in the Process Portal
  - This function is being moved to the Process Admin console
- Saved queries are listed in the Saved Searches tab on the Work page of the Process Portal
  - All queries are visible to everyone

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In BPM version 7.5 the ability to create searches and save them was an integral part of the Process Portal. As of version 8.0, the creation of the saved searches has been moved to the Process Admin console. The interface is shown in the screen capture in the upper right. Here you can compose your query, test it and then save it. You can then come back at a later time to make updates.

All users can create saved searches. Once a saved search has been created, the Saved Searches menu item shows up in the work area of the Process Portal. The saved search is in the drop down menu. Shown in the lower left screen capture, is a search that returns the process instance status. The actions are restricted to the users with the appropriate privileges, as expected.

Dashboards

- Available from the *Process Portal*
- New Dashboards are created as 'coach views'
  - Exposed as *Dashboards*
    - From the *Process Designer*

Creating Dashboards is another aspect of the Process Portal that is a little different from the way it was in version 7.5.

From the uppermost screen capture you can see that dashboards can be accessed in the Process Portal from the Dashboards area.

There dashboards shown in the menu are the default dashboards that come with the product. To create your own custom dashboards you need to create a coach view using the Process Designer and then in the overview tab, expose it as a dashboard. This is shown in bottom left screen capture.

The ad-hoc start event is a feature that is also available in version 7.5, but now with version 8 there have been some minor additions. The ad-hoc start event is a special type of start which can be identified by the symbol associated with the "Abort the test" icon highlighted in the lower left screen capture. When there is a start event the business process will wait at that node for the event to come in. With the ad-hoc start, the event is generally triggered by a menu option that can be selected by a user. The two menus in the upper screen captures show what it looks like in the new version 8 Process Portal.

Selecting the icon and inspecting the implementation properties will reveal two new visibility options. With version 8 the process developer can restrict who can trigger the Ad-hoc Start events and when. Who can trigger the event is configured by specifying the swimlane option and the "when", is specified with the milestone option. The business process is at the "Step 2" milestone and the operator, Tom is logged into the Process Portal. Therefore the "Abort the test" event is available. If Harry the engineer is logged into the Process Portal, then the "Start prep for rework" is available.

Auto-flow

- Enabled in the implementation properties of the task
  – In Process Designer
- Allows for moving from one task to another smoothly without returning to the task list each time
- Very nice and efficient for sequential processes that are performed by the same user
- It works for the *Process Portal* as expected.
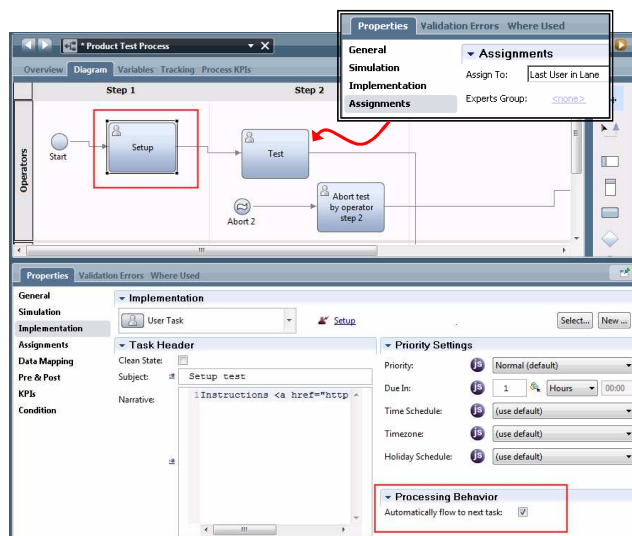
16   Introduction to the Process Portal   © 2012 IBM Corporation

This last feature is available in the Process Designer Inspector and the Process Portal. There are some business process flows that are inherently sequential and each task is done by the same person. In this case it is desirable not to return to the task list to claim the task each time. With version 7.5 this kind-of work flow can be done by specifying several user interface steps in a single human service. This is OK as long as the user-interface steps are closely coupled. In the cases where they are not, important process steps become hidden inside the human service. With version 8 the process developer can now create this type of flow without having to subsume important information in the human service.
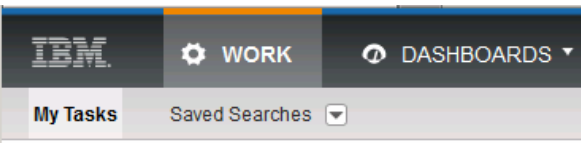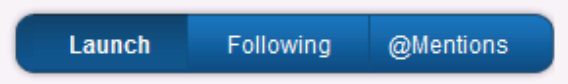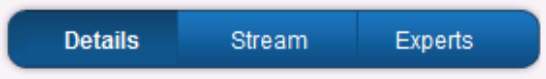
For this new feature to work, there are two configuration steps. In the task that you want to flow from, set the property in the task implementation section to "automatically flow to the next task". Then in the task you want to flow to, set the assignments property to, "last participant in lane". With these two options set, there is a smooth transition from one human task to the next.

Summary

- Introduction
  - All new
  - Highly collaborative work experience
  - Subscriptions
  - Experts
  - Streams for attachments and comments
- Profiles
- Saved Searches
- Ad-hoc start event
- Auto-flow

The BPM Process Portal is completely new. It is a highly collaborative work experience with features for managing an online conversation with experts and for subscribing to specific process instances. There is a built in notification system and a record of the conversations are stored in the business process "stream." The stream is also a place where you and the experts can review all the steps that have been previously been completed and are currently active. You can also include supporting documentation as attachments to the business process streams.

As part of the revamping of the Process Portal, some features such as the creation of the saved searches, have been relocated to the Process Admin console. Other features such as the ad-hoc start event have been improved to enable you to manage who and when the feature is used. The auto-flow feature is a newly supported programming paradigm for sequential flows involving a single user.

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