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Automate manual processes with IBM BlueWorks Live

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29 June 2011

IBM Blueworks Live enables users to collaborate on process improvement, and enables automation of ad hoc processes that are currently performed manually. In this article, business users will learn how to use Blueworks Live and process automation to manage work currently being performed manually, such as email.

Overview

Blueworks Live combines features of WebSphere Lombardi Blueprint and IBM BPM Blueworks into one online cloud-based BPM tool that enables collaboration and process automation. In this article, we'll focus on process automation in Blueworks Live. Process automation is a new feature that allows users to automate work that they currently do manually.

Using Blueworks Live, business users can gain insight into a business process and ensure that the proper steps are being executed in a timely fashion. Blueworks Live allows you to document the process so it can be repeated in a consistent manner.

Rather than repeatedly requesting status updates through email or instant messages, a business user can log in to Blueworks Live and see exactly what tasks have been completed, what tasks are currently being worked on, and what tasks still need attention. In addition, the business user can also keep track of which tasks are overdue and quickly focus their attention on any roadblocks to ensure those tasks are completed.

Create a process

To create a process, you must first log in to Blueworks Live at http://www.blueworkslive.com. Blueworks Live allows users to create spaces to interact with smaller communities, such as a department or team. Users can have different access rights to different spaces.

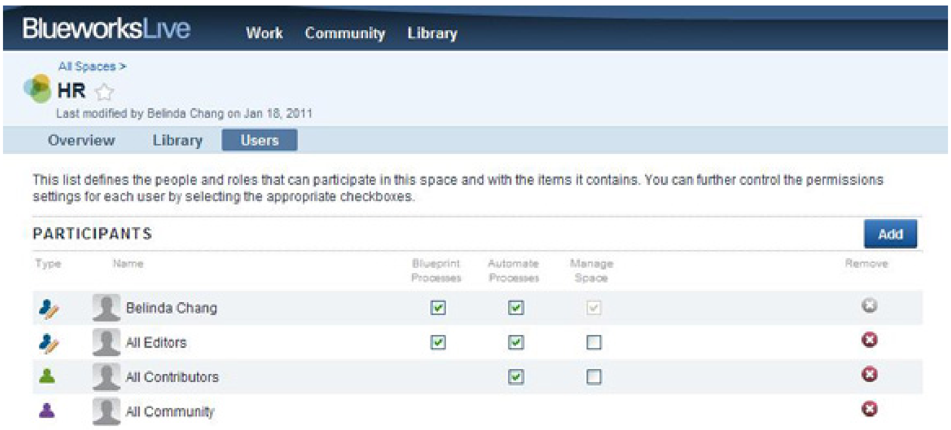
Blueworks Live spaces

A space in Blueworks Live is akin to a folder, in which you can store and organize processes and related artifacts.

All the processes and assets created reside in a specific space. Before starting, you need to create (or select an existing) space to place their process definitions in. To do this, open the **Library** tab and then the **Spaces** tab. From here you can create a new space, or select from a list of existing spaces.

To make sure users have the right access, open the space. On the **Users** tab, you can see the access rights, and users with the appropriate permission can modify the access rights to a specific space. Figure 1 shows the options for setting up security in the HR space.

Figure 1. Setting security rights for a space

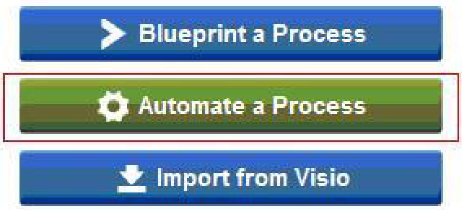


Create a checklist process

The checklist process is a series of tasks that are performed in parallel. Each task can be assigned to a different user. The individual tasks can have a specific due date or there can be one date by which all tasks must be completed.

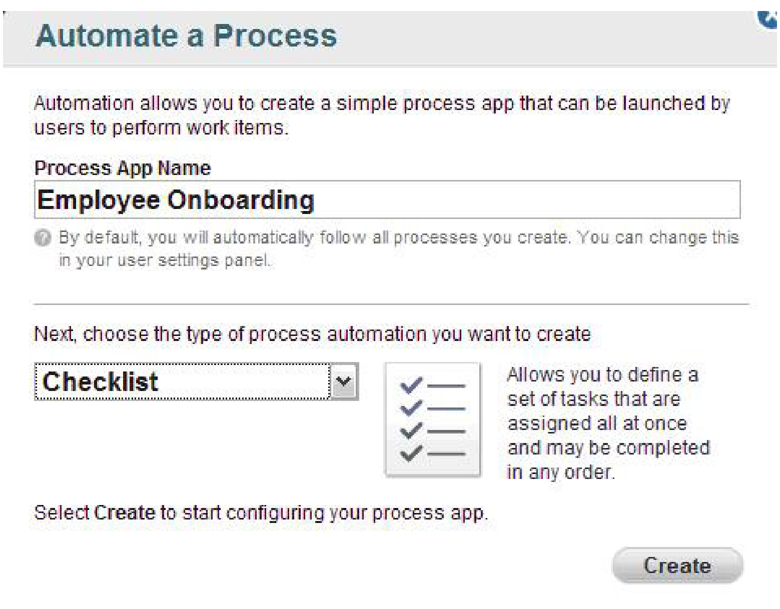
1. Create the process application by opening the **Library** tab and then clicking the **Automate a Process** button, shown in Figure 2.

Figure 2. Select Automate a Process



2. Give the process a name and select the process automation type, then select the **Checklist** option as shown in Figure 3. We'll discuss the **Workflow** option in the next section.

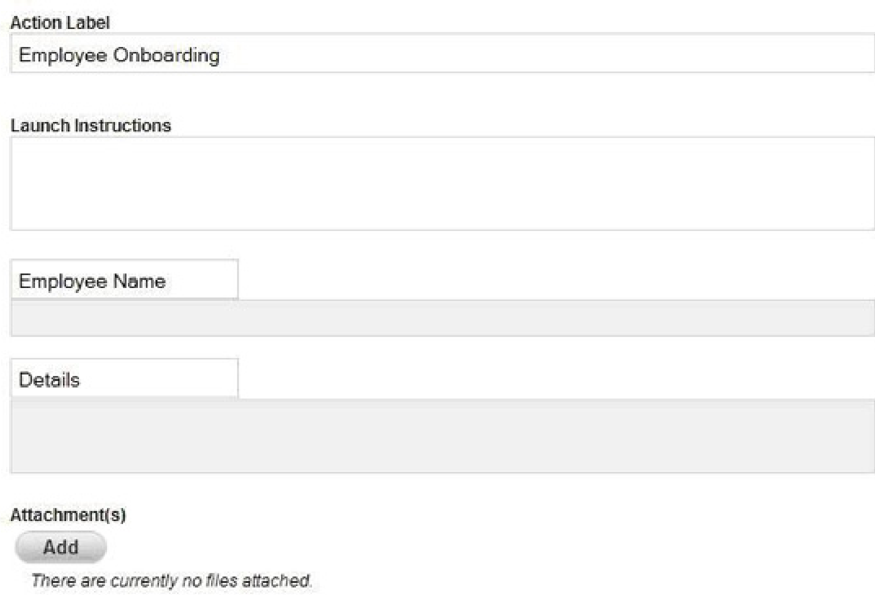
Figure 3. Create a checklist process



3. Provide details about the process, as desired. You can modify the **Work subject** and the **Details** sections. As you can see in Figure 4, we changed the work subject to **Employee Name**. You need to provide enough information here so that the other business users

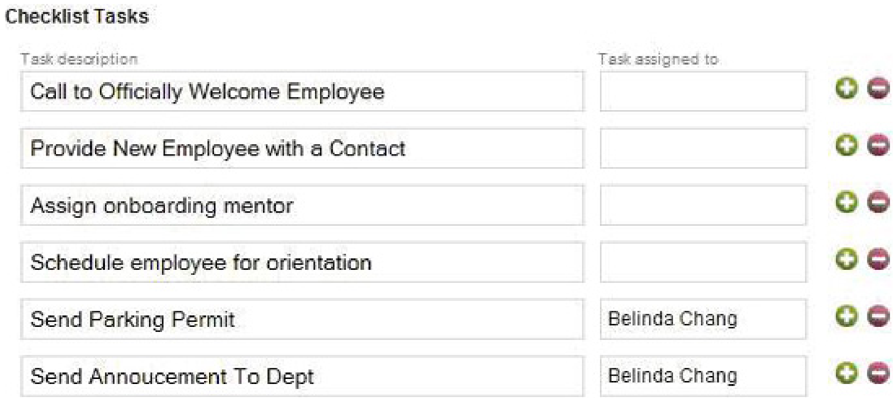
assigned to the tasks can perform their job. These details will be displayed in the business user's space, so it's important that they understand the context of the task from these details.

Figure 4. Provide details about the process



4. Provide the tasks necessary to complete the process. Keep in mind that items in checklists can be done in parallel. None of the tasks should rely on a previous task to be completed before they can be started.
   At this point, you can opt to assign the tasks to an individual or you can leave them empty. If the same person always does one task, it may be helpful to assign them to the task now, as shown in Figure 5. You can always change the task assignment later if roles change. Any unassigned tasks must be assigned when a user launches the process.

Figure 5. Add tasks to a checklist process



5. Share the checklist by clicking the **Share with Participants** button on the bottom of the page.

Create a workflow process

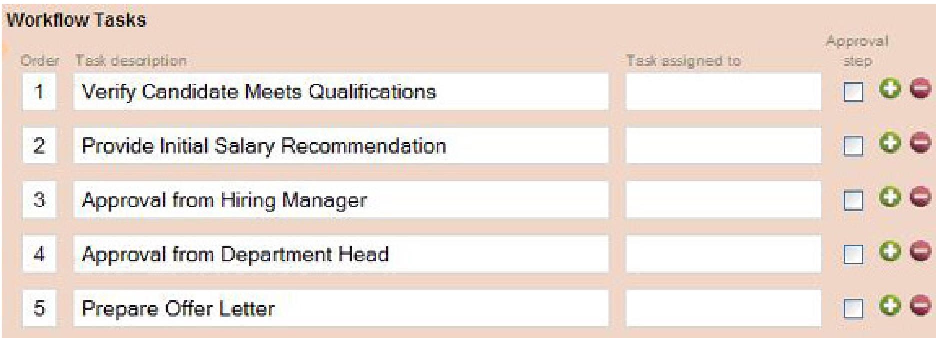
A workflow process defines a sequence of tasks that must be done in a specific order. Each task can be assigned to a user, just like in the checklist process. Since the workflow process is a serial process, each task has a due date, unlike in the checklist process where there can be a single due date for the entire process. Workflow processes also have the concept of an approval task. If the approval task is rejected, then the entire process terminates.

To create a workflow process, do the following:

1. Click **Automate a Process** to automate a process (as described in detail in Create a checklist process. Give the process a name and select **Simple Workflow** as the process automation type.
2. Define the process details. Remember to provide enough information so that someone who is working on the process later will have enough context to work on the task at hand.
3. Define the required workflow tasks. You can click the green "plus" icon to add more tasks. The main thing to keep in mind for the workflow process definition is that the tasks are going to be

completed in sequence. You can also specify approval steps by clicking the checkbox beside a step in the task list, as shown in Figure 6. If a task is not approved, the process instance is terminated and the rest of the tasks will not be executed.

Figure 6. Add tasks to a workflow process



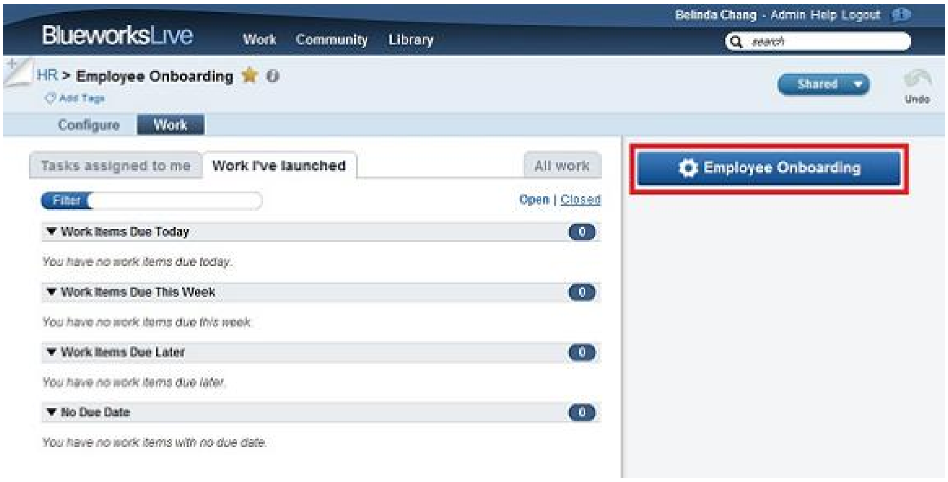
4. Share the process by clicking the **Share with Participants** button on that the bottom of the page.

Launch the process

Once your process is defined, you can launch the process for a specific instance by doing the following:

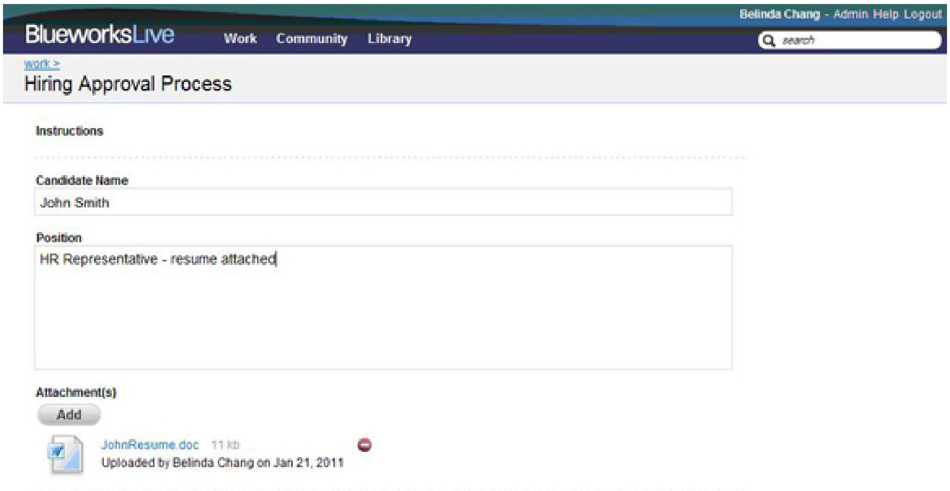
1. In Blueworks Live, open the space where the process is defined. If the user cannot see the specific process, make sure that they have the right security privileges to launch the process. Click on the **Library** tab to view the processes in the space. From that tab, you can select the process you want to work with. Once you're viewing the details of the process, you can launch a process instance by clicking the button in the column on the right hand side that is labeled with the specific process name, as shown in Figure 7. You can also launch a process in the **Actions** section of the **Work** tab.

Figure 7. Launch a process



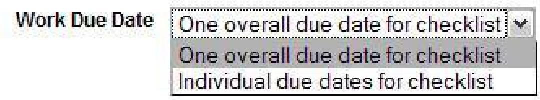
2. Fill out the necessary process information and details. You can also attach a document that will be available to other task assignees, such as a candidate's resume, as shown in Figure 8.

Figure 8. Fill out process details



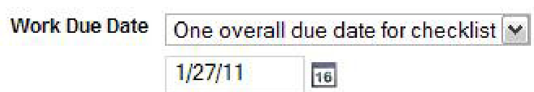
3. The next step is to assign the tasks to the right users and to assign deadlines for each task.
4. The configured process is simply a starting point; users can modify the process by adding tasks, modifying assignees, and so on. For the checklist process, you have the option of assigning a due date to the overall process (which means each task in the process will have the same due date) or assigning individual due dates to each task, as shown in Figure 9.

Figure 9. Select the due date type



5. If you choose an overall due date for the checklist process, you can assign the date right below the check box, as shown in Figure 10. Keep in mind that the due date cannot be earlier than the current date.

Figure 10. Using an overall due date for the process

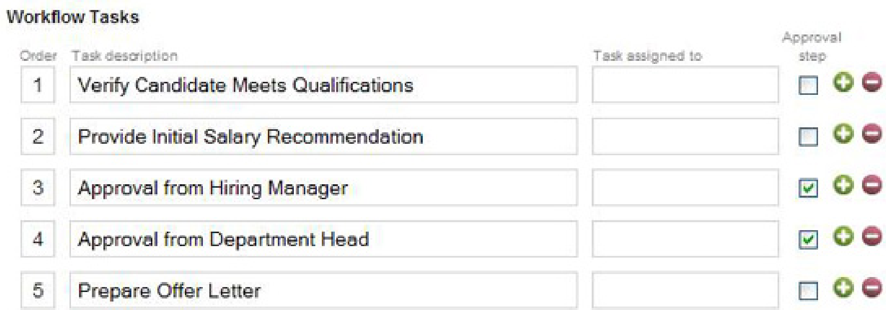


6. If you choose the option for individual due dates or if your process is a workflow process, a **Task due date** field will display next to each task. At this point, you need to assign the individuals responsible for each task. The process will not be launched until you assign a user and a due date to each task. The due dates assigned cannot be earlier than the current date. Figure 11 shows a completed task list.

Figure 11. Assigned tasks and due dates

7. For workflow processes, you also have the option to select which tasks are approval steps. In Figure 12, the tasks **Verify Candidate Meets Qualifications**, **Approval from Hiring Manager**, and **Approval from Department Head** are marked as approval tasks.

Figure 12. Assign approval steps for a workflow process

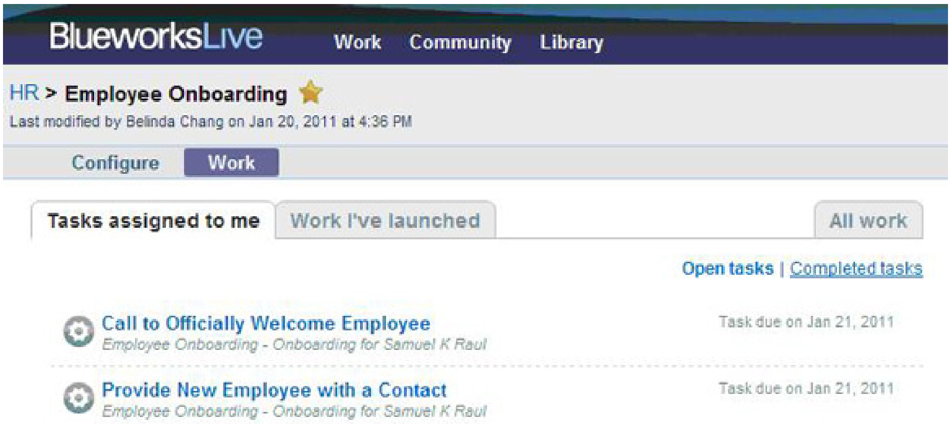


8. Click **Launch** to start the process.

Working on a process

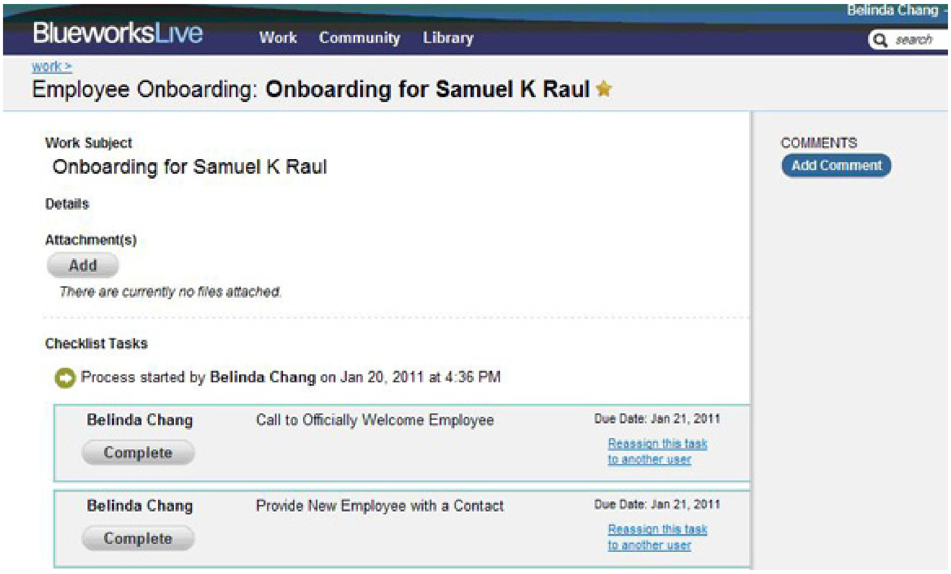
After the process is launched, the individuals responsible for completing the tasks should receive emails to notify them of the task. For checklist processes, users might get more than one email, since tasks are performed in parallel. When a user logs in to Blueworks Live, they can view the tasks assigned to them on the **Work** tab, as shown in Figure 13.

Figure 13. BlueworksLive space view



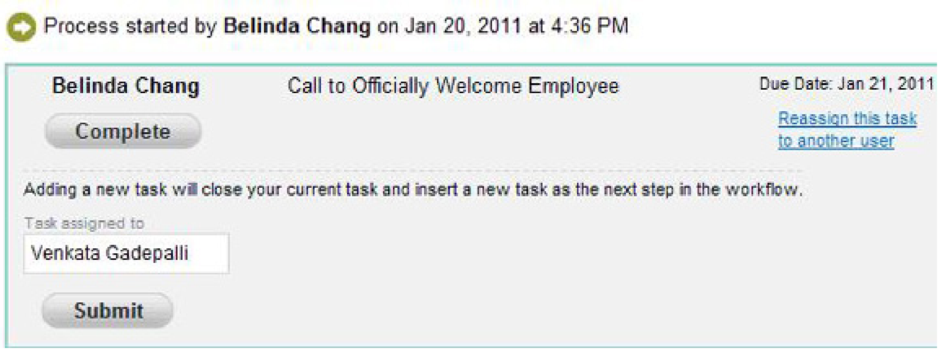
When users click on a task, they can see all tasks available to complete. A view of what the user sees is shown in Figure 14. The user can add attachments to the specific instance or add any comments that might be useful for others to be aware of when working on the tasks. By clicking the **Complete** button, the user can indicate that the task is complete.

Figure 14. Working on a task



Tasks can be reassigned to another user. In Figure 15, the business user clicked **Reassign this task to another user** and selected the user they wanted to reassign the task to.

Figure 15. Reassigning tasks

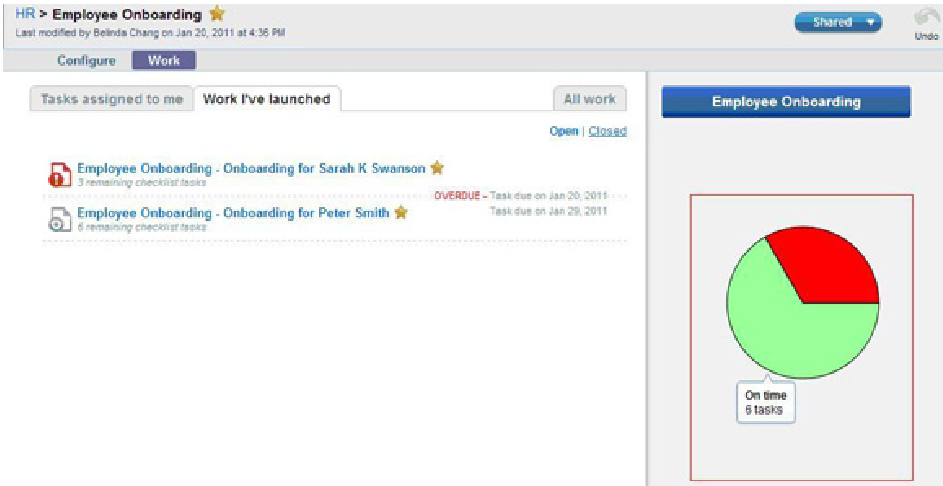


If the task is an approval task, as specified when the process was launched, the user can choose to approve or reject the task, as shown in Figure 16. If the user rejects the task, the entire process is terminated. If the user approves the task, the next task in the flow is executed. If the user rejects the task, the entire process is terminated, and none of the future tasks are assigned.

Figure 16. Approve a task

In addition, users can examine the current status of the process, as shown in Figure 17. A pie chart shows the tasks that are on time, as well as the tasks that are late. A business user can quickly glance at the chart to get an idea of the overall status of the process.

Figure 17. Status overview



Conclusion

Process automation within Blueworks Live is a quick way for business users to document and perform processes in a consistent fashion. Using both checklist and workflow processes, many different types of processes can be automated. In addition, using BlueWorks Live business users can quickly view the status of their processes.

Acknowledgements

The author would like to thank Ashok Iyengar for his help in reviewing this article.

Resources

- To learn more about Blueworks Live and to sign up for a 30-day trial of Blueworks Live, visit http://www.blueworkslive.com.
- developerWorks BPM zone: Get the latest technical resources on IBM BPM solutions, including downloads, demos, articles, tutorials, events, webcasts, and more.
- IBM BPM Journal: Get the latest articles and columns on BPM solutions in this quarterly journal, also available in both Kindle and PDF versions.

About the author

Belinda Chang

Belinda Chang is a Software Engineer with the WebSphere Enablement Team for IBM Software Services for WebSphere, working on pre-sales engagements with a focus on the Business Process Management stack.