

Business Process Integration in WebSphere Portal

Juergen Schaeck (jschaeck@de.ibm.com)



"So you want to increase efficiency and boost productivity. And you want to do it fast. Then you want..."

WebSphere. Portal Version 6.0

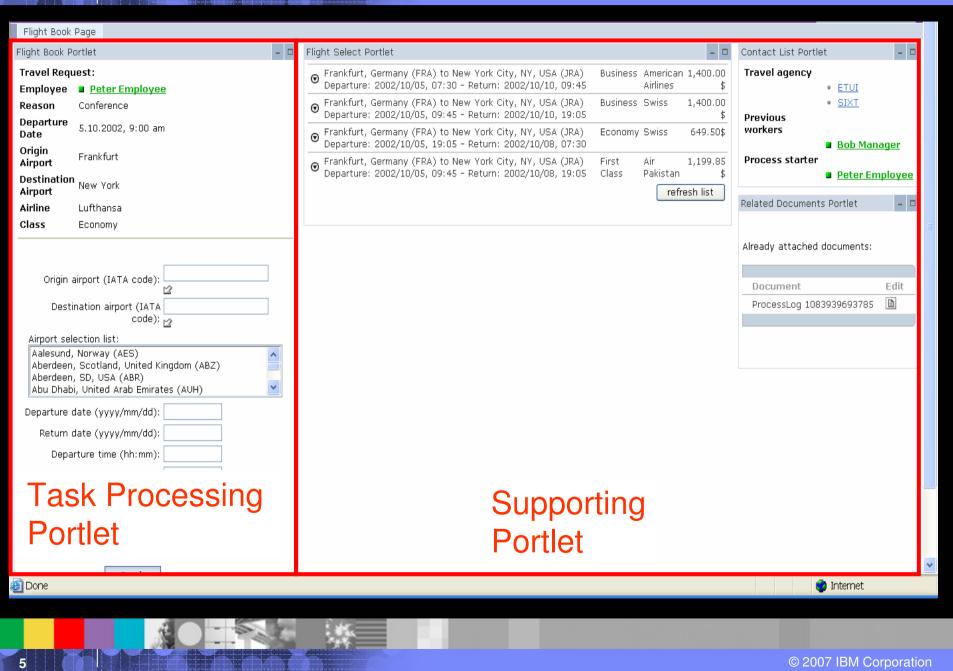
Agenda

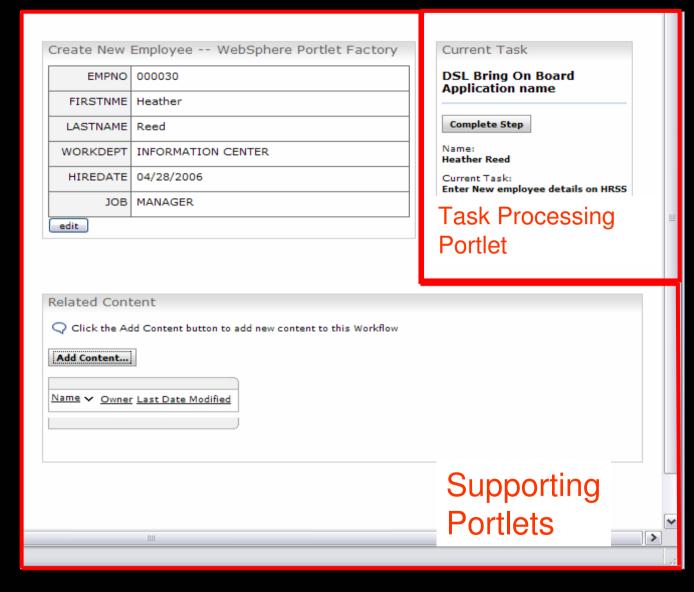
- Motivation: What is the value add of using portals as the UI for Workflows.
- Web Sphere Portal and Workflow
- Development of Process Integration Applications
- Deployment & Operation
- Summary

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Motivation

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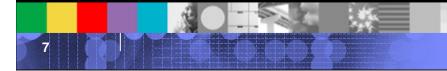






Message

- WebSphere Portal presents Human Tasks within processes to the right people at the right time.
- Any information and any applications required to process a task are presented in context to the user at once in an uniform user experience.
- Users are not distracted by a multitude of function and data that is irrelevant to their particular task.
- WebSphere Portal leverages business processes to their full potential as people can process their tasks in the most efficient way.







Workflow in WebSphere Portal

Workflow in WebSphere Portal

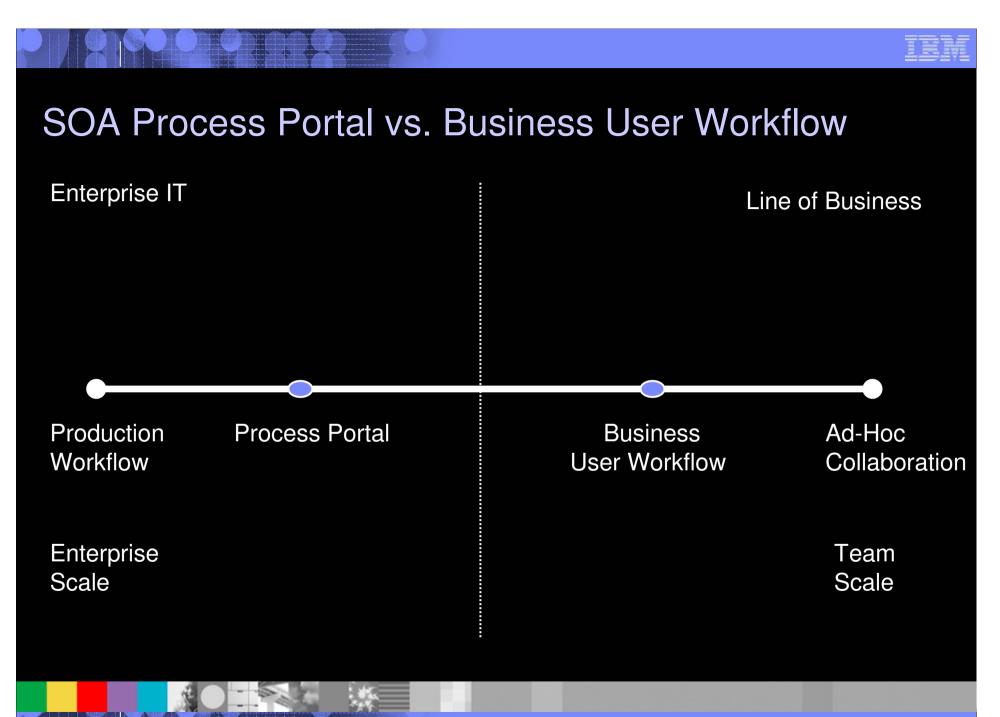
Business User Workflow

Out of the box experience that allows **business users** to create document, forms, and collaboration centric workflows for their department/ line of business **without help** from their IT department. The focus is on Workflow as a system for coordinated collaboration empowering people working together on a business process.

Process Server – Portal Integration

Portal as the user interface for human tasks and SCA (Service Component Architecture) services hosted by WebSphere Process Server. The focus is on process automation, System integration and more sophisticated and rigid data handling in an transactional environment.









Business User Workflow Demo

Click here

Use BUWF when...

 you want to run collaborative, user facing Workflows VS.

VS.

- Use WPS-based SOA Process Portal when...
- you implement core, mission critical processes typically

- You are operating on unstructured data (e.g. documents) best read by humans
- you want your business users to create and/or customize your WFs



 you are operating on structured data best read by machines

- You need central control of all your workflows
 - workflow implementation is owned by your IT department
 - There a quality and spec compliance guidlines for your workflows

Use BUWF when...

 focus on human interaction. simplicity and easy customization

VS.

Use WPS-based SOA Process Portal when...

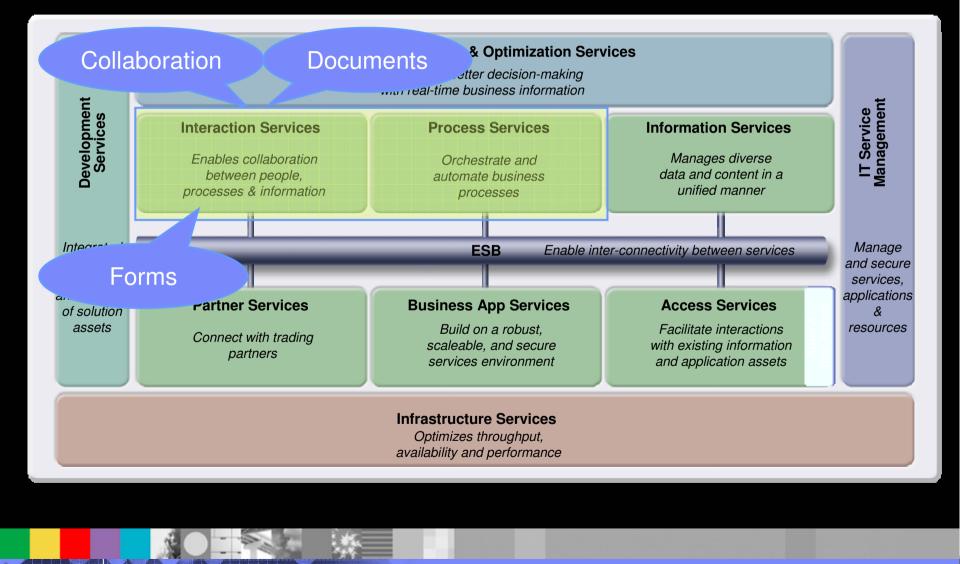
you focus on Application integration and Service Choreography

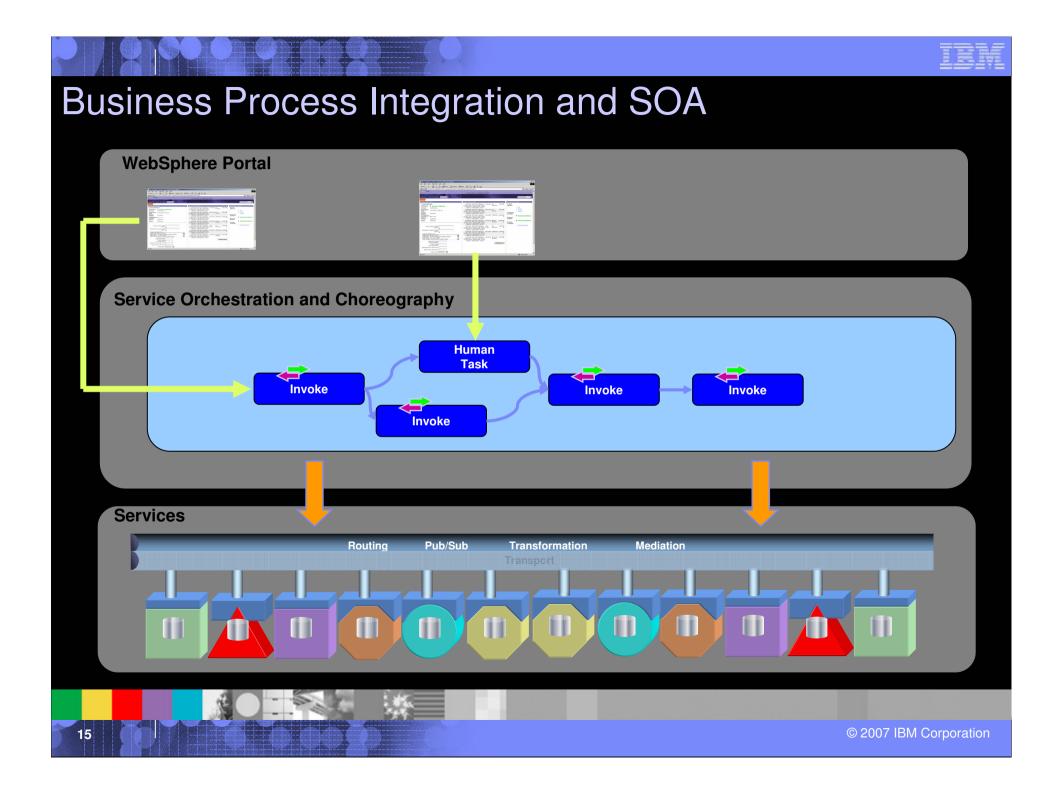
 You need the full feature set supported by WPS

...

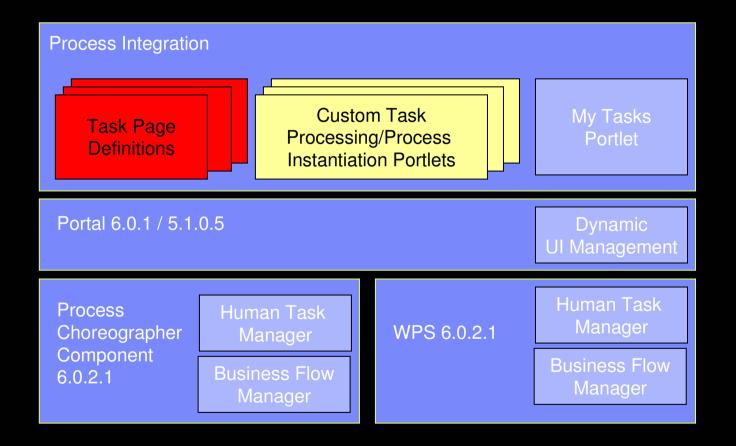
- you need parallel processing
- you need the full flexibility of BPEL

Business Process Integration and SOA





Platform and Services Stack for Process Integration



Out of the box components

	BUW	Process Portal
Task List		
Task Processing		×
Portlet		
Supporting	Related	×
Portlet	Documents	
Portlet based workflow builder		\mathbf{X}
Process Initiation		\mathbf{X}
Portlet		
WMM Staff Plugin		\checkmark

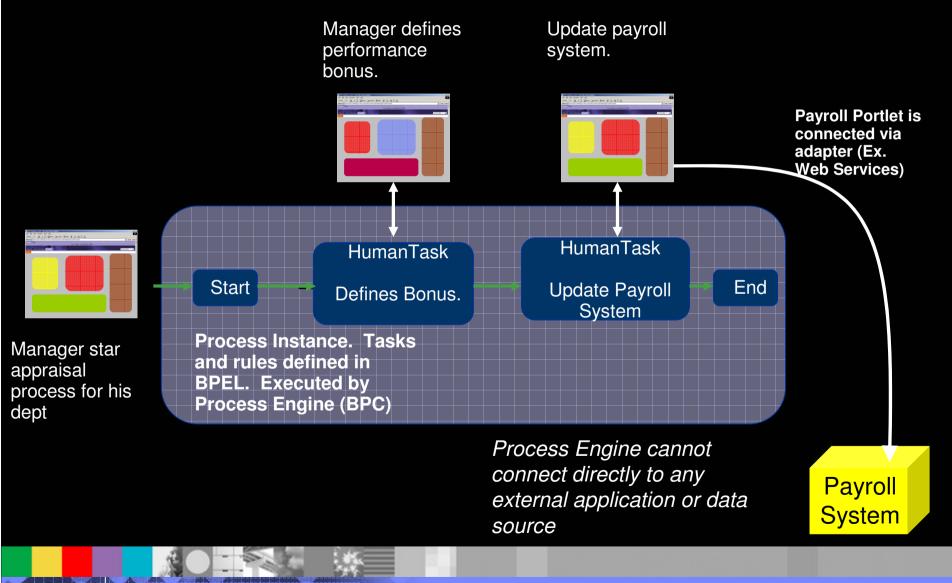
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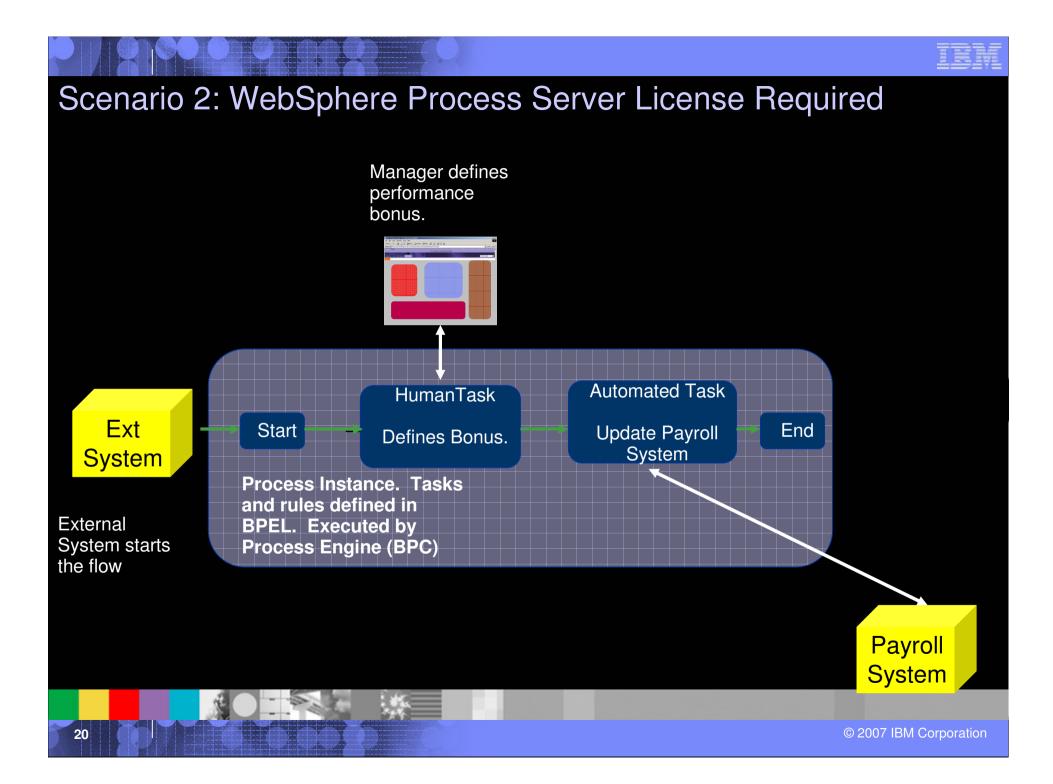
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WebSphere Portal Licensing

- WS Portal Enable/Extend delivers the value of improving the effectiveness of human to human tasks with restricted license of Process Choreographer
- The Process choreographer installed as part of portal provides only core functionality to run business processes and does not include WPS only features like
 - Business State Machines
 - Business Rules
 - Interface Maps
 - Business Object Maps
 - Relationship Services
 - Dynamic Service Selection
 - Failed Event Handling

Scenario 1: No WebSphere Process Server License





Supported Product Combinations

Portal	Process Server	WBI-SF
5.1.0.3	6.0.1.1 + 6.0.1.x	5.1.1.3
5.1.0.4	6.0.1.3 + 6.0.1.x	5.1.1.5
6.0	6.0.1.1 + 6.0.1.x	
6.0.0.1	6.0.1.3 + 6.0.1.x	
6.0.1	6.0.2 + 6.0.2.x	
6.0.1.1	6.0.2.1 + 6.0.2.x	

Cm = Compatibility mode. Only features supported in initial release are supported. Not new ones.

Note: Make always sure to check supported software for the OS Version you want to use for WP and WPS.



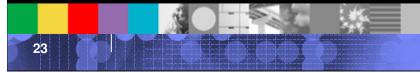
Development of Process Integration Applications

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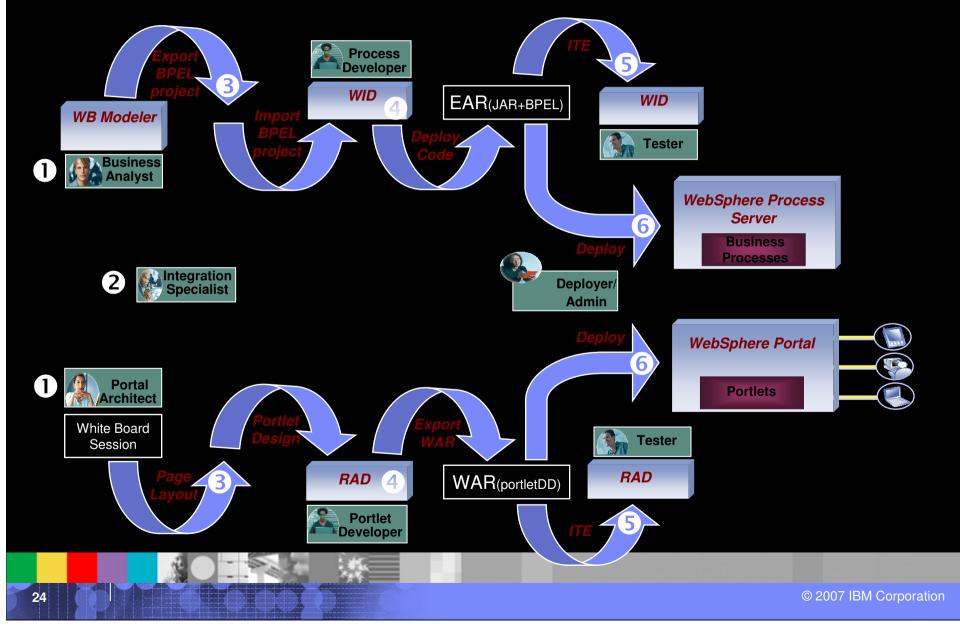
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Levels of Process Integration

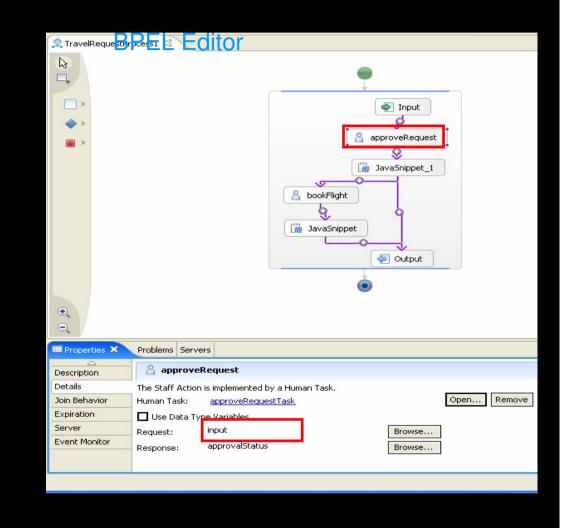
Level	Flow Orchestration	Task Notification	Task Completion	UI for conditional routing related data	UI for backend related data	Backend state updates
0	All participants need to know the flow and coordinate themselves	Mail, Phone, IM	Informal: Current worker notifies next worker to start.	n/ a	Dedicated Portlet	Dedicated Portlet
1	Business Process	Task List	Task Processing Portlet	Task Processing Portlet	Dedicated Portlet used as supporting portlet	Dedicated Portlet
2	Business Process	Task List	Task Processing Portlet	Task Processing Portlet	Task Processing Portlet	Business Process



Process Portal Methodology



- Within the BPEL editor, click the staff activity for which the Client UI Identifier should be defined for (i.e. approveRequest).
- Click the link in the details view or select open.



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- Add a portal client entry to the Client Settings by clicking the according icon.
- Define the values in the Portal Client view below.

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	Unique name wps.approvalpage							
	Type: Page Definition							



Defining the staff verbs

- Click the Potential Owner entry in Staff settings.
- Select Group Members as verb.
- Enter the name of the group to be used (i.e. approvers in our sample) and select false from the drop down list describing the IncludeSubgroups property.

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Defining the staff plugin

- Click on the task icon in the Human Task Editor
- Chose Details from the context menu appearing.
- Define the JNDI name of staff plug-in configuration, i.e. bpe/staff/wpswmmconfigur ation.

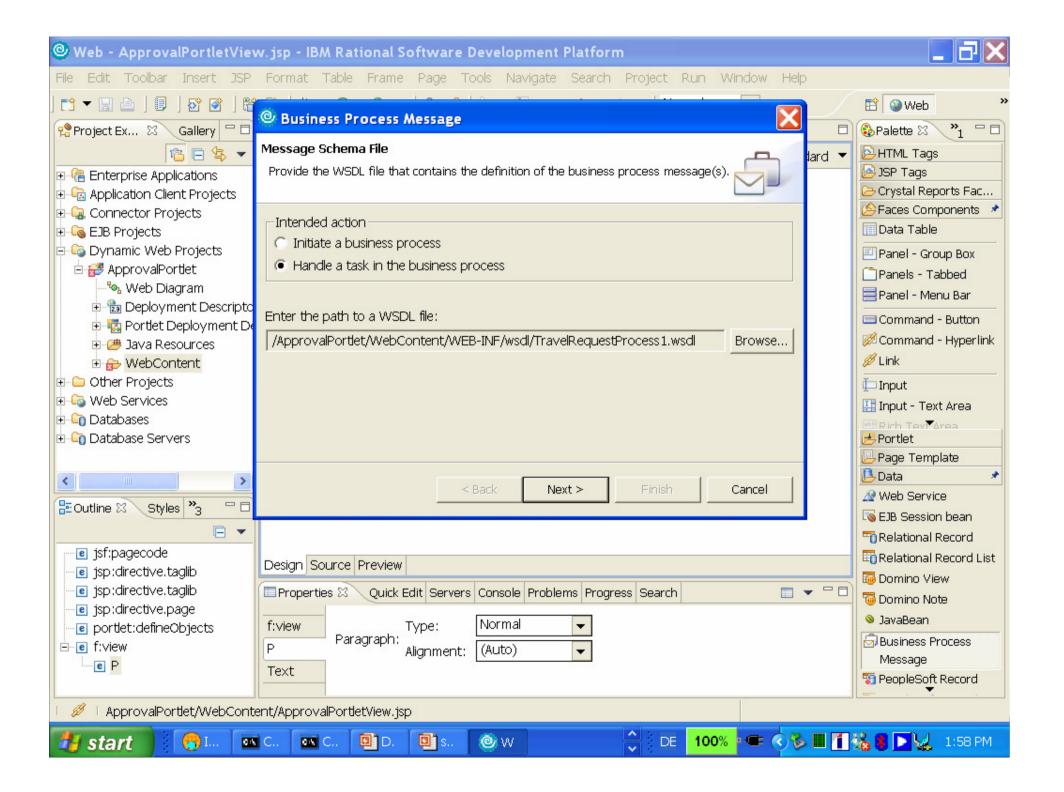
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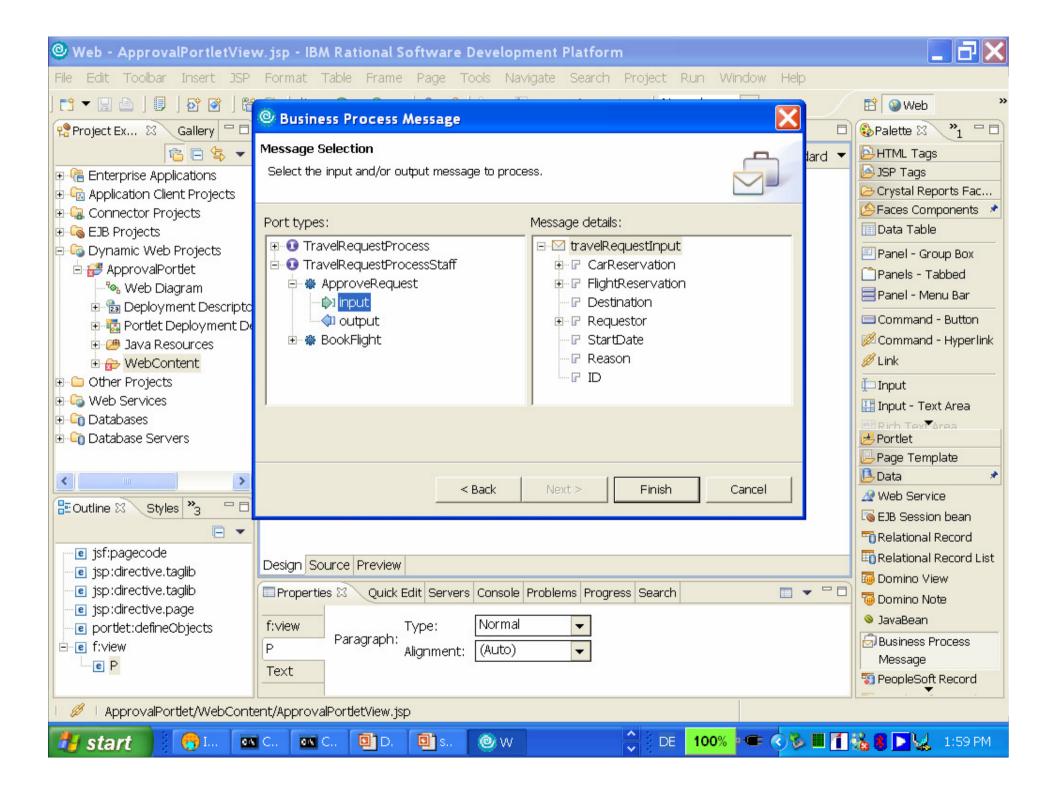
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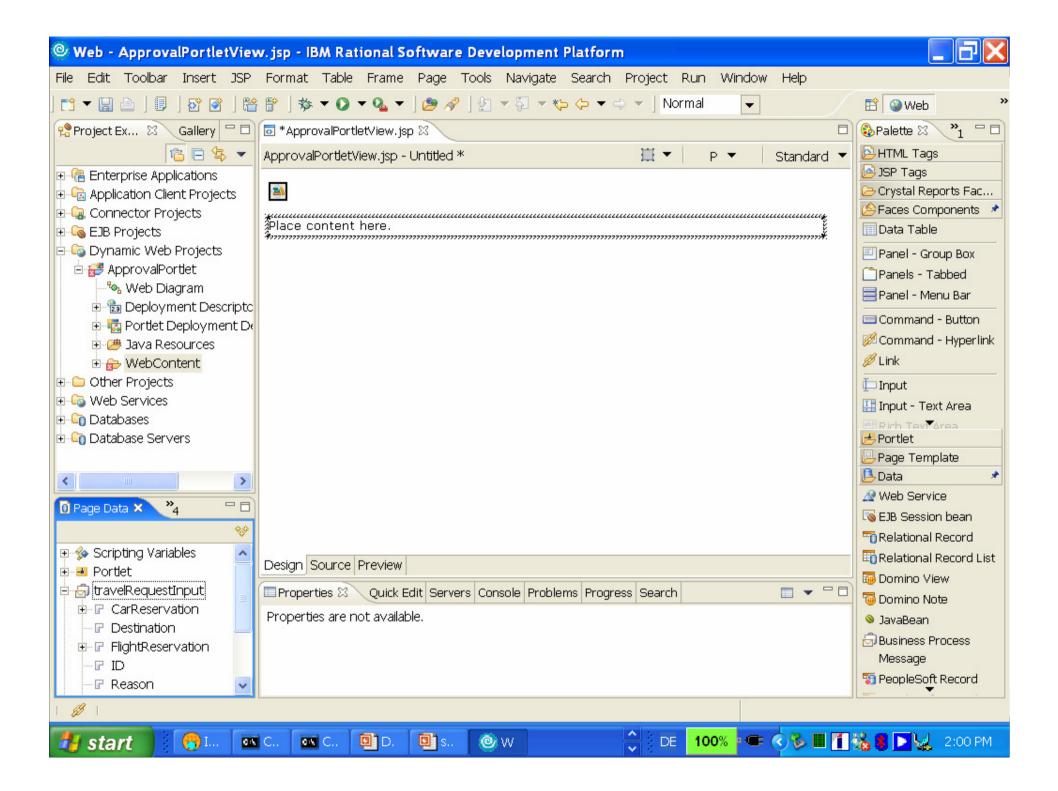
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Developing process based portal applications : Portlet Development

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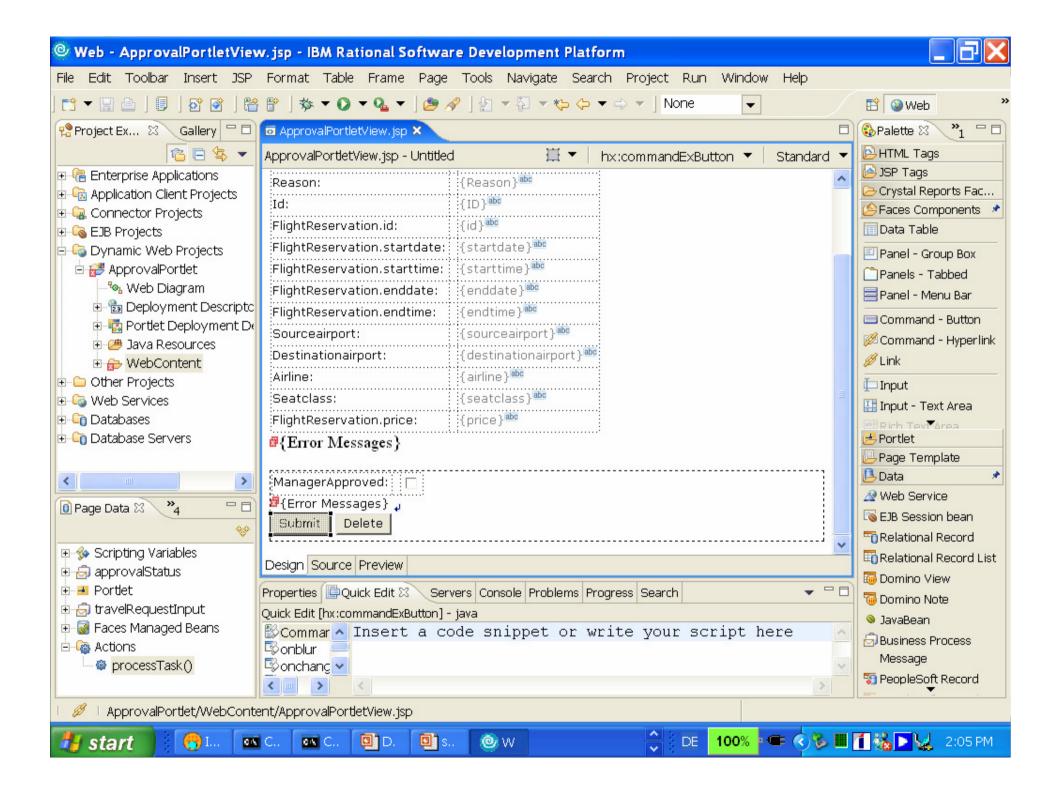




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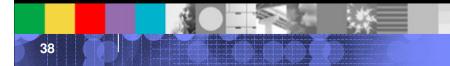
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Product relationships and combinations

Product	UTE
RAD 6.0.x	Portal 5.1.0.x
WID 6.0.x	WPS 6.0.x
RAD 7	Portal 6.0 (BPC 6.0.1 : Not enabled per default)





Developing process based portal applications : Task Pages

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Designing a task page: Planned Layout

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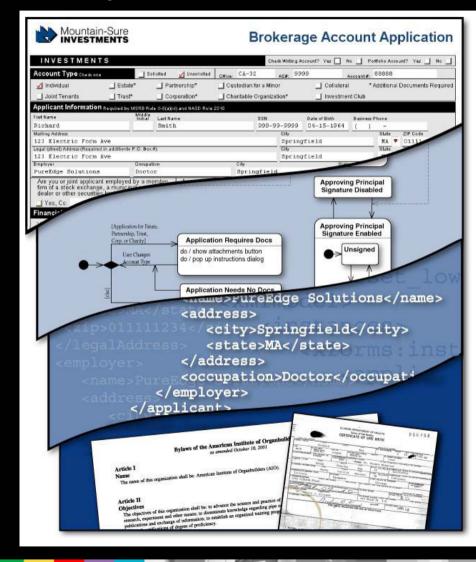
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Workplace Forms



Presentation Layer

- Pixel-perfect for duplicating paper forms
- Guided-interview, or wizard, driven

Business Logic

 Define business logic for data contained in the form, i.e field x is only displayed in case that field y has value z.

Data Instances

- Based on W3C XForms specification
- Multiple XML payloads for integration
- Validate against external XML Schemas

File Attachments

- Capture complete transaction
- Supplemental or associated eForms
- MS Office, videos, faxes, etc.

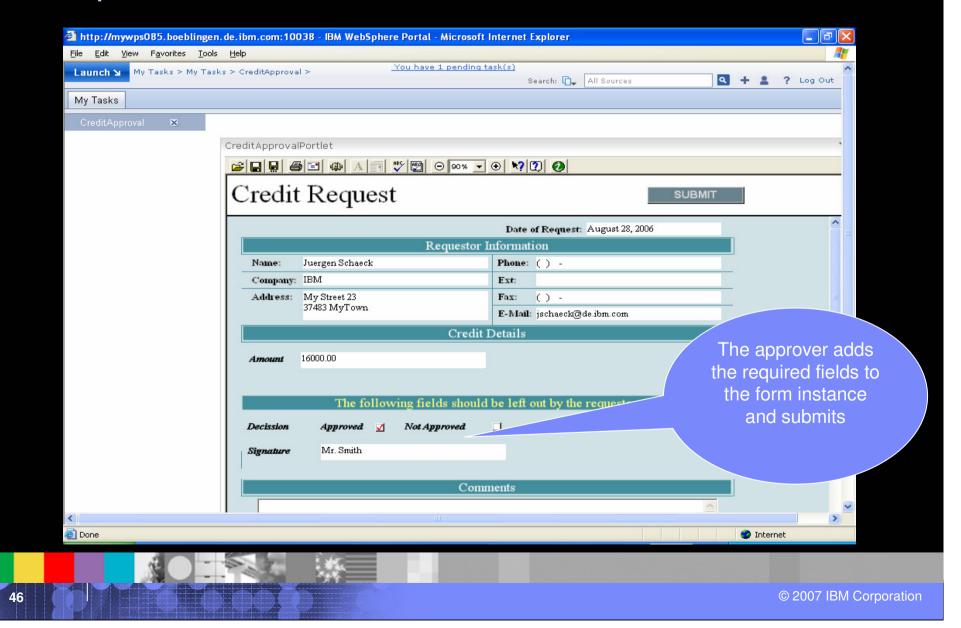
-	And the Party of Street, or other

Workplace Forms and Business Process Integration

Workplace Forms can be used in combination with business processes in many different ways. Two interesting scenarios are:

- A workplace form is used solely as the UI for tasks of a business process that operates on well defined in/output messages.
- 2. A workplace form is used not only as the UI but also as the data container for all relevant data used by the business process.

Workplace Forms







Deployment & Operation

47



Process Support in Portal

Since process support requires access of the process/human task engine , it will only be available if:

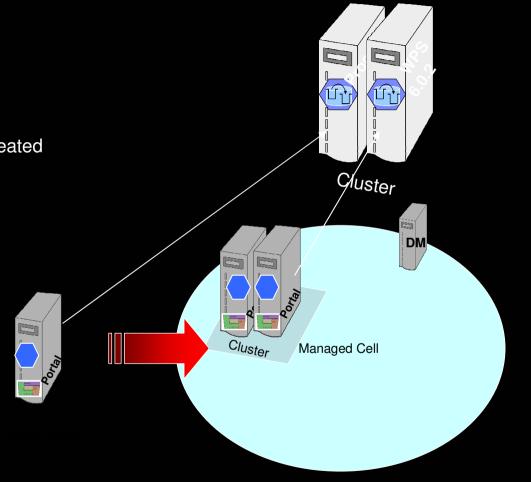
- Portal is installed on top of the Business Process Choreographer (either as part of Portal 6.0.1 or WebSphere Process Server 6.0.2)
- The client option of WebSphere Process Server to connect to a remote Business Process Choreographer installation.

Note: Installing WebSphere Process Server on top of an existing portal server Installation is not supported with the exception of the **client** functionality.

Proposed setup for Portal 6.0.1

Portal is connected via WPS Client Option and not full installation as in the past.

Decoupling also provides advantages in later Cluster setup, i.e secondary nodes can be created from a standalone profile too.



Deployment Scenarios

- Development System
 - Single Machine setup for development purposes
 - Never extended to a different system
 - Using only cloudscape DB

Single Server System

- Easy setup on minimal hardware for use as pilot or production system
- If the pilot is successful, it has to be possible to turn this system into a production system
- A production grade DB has to be used

Cluster System

- Needs to support scalability through clustering
- If the business requirements increase, it must be possible to turn this into a HA system.

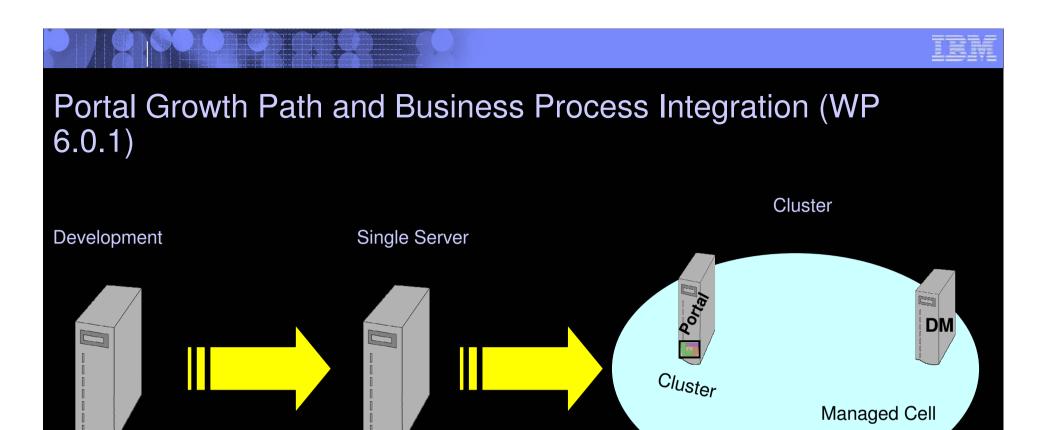
High Available System

 Needs to support high availability. To support this in Version 6 we will use a setup with 2 lines of production.

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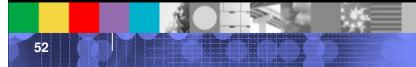
Development System

- Is the result of a standard portal install
- Process Container is configured on WebSphere_Portal server (shares the same jvm)
- WMM Staff Plugin is configured for the default WMM setup
- Human Task Manager and Business Flow Manager configured
- Message Engines for the SI buses configured

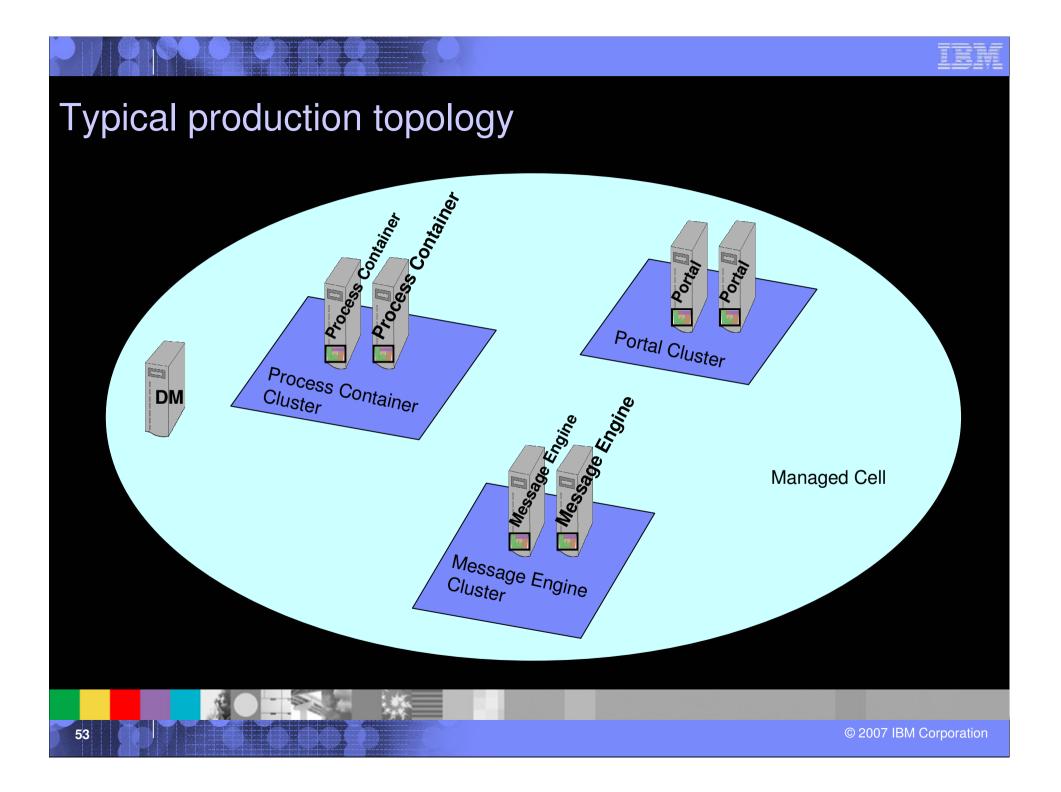


Federate Node

Note: This works only if the cell is empty. For secondary portal nodes it is still required to create a custom profile, federate it, and install portal afterwards.



DB Transfer



Summary

- After this session, you should have
 - Understood the vision behind Business Process Integration in Portals
 - Understood the architecture of Business Process
 Integration in WebSphere Portal
 - Learned how to use Business Process Integration in WebSphere Portal in Projects



Additional Information and Resources

- Articles:
 - Develop Task Processing portlets:

http://www-128.ibm.com/developerworks/ibm/library/i-odoebp20/ http://www-128.ibm.com/developerworks/websphere/library/techarticles/0505 nauerz/0505 nauerz.html http://www-128.ibm.com/developerworks/ibm/library/i-odoebp18/ http://www-128.ibm.com/developerworks/websphere/library/techarticles/0606 gu/0606 gu.html

- Deployment

http://www-128.ibm.com/developerworks/websphere/techjournal/0604 chilanti/0604 chilanti.html

- Dynamic UI

http://www.ibm.com/developerworks/websphere/library/techarticles/0608 engehausen/0608 engehausen.html

Deployment

http://www-1.ibm.com/support/docview.wss?rs=2307&context=SSQH9M&q1=7008679&uid=swg27008679&loc=en_US&cs=utf-8&lang=en



Additional Information and Resources

- WebSphere Portal and Workplace Catalog:
 - http://www-3.ibm.com/software/genservers/portal/portlet/catalog
- WebSphere Portal Product Information:
 - http://www-306.ibm.com/software/genservers/portal/enable/
- WebSphere Portal Information Center documentation
 - http://www-

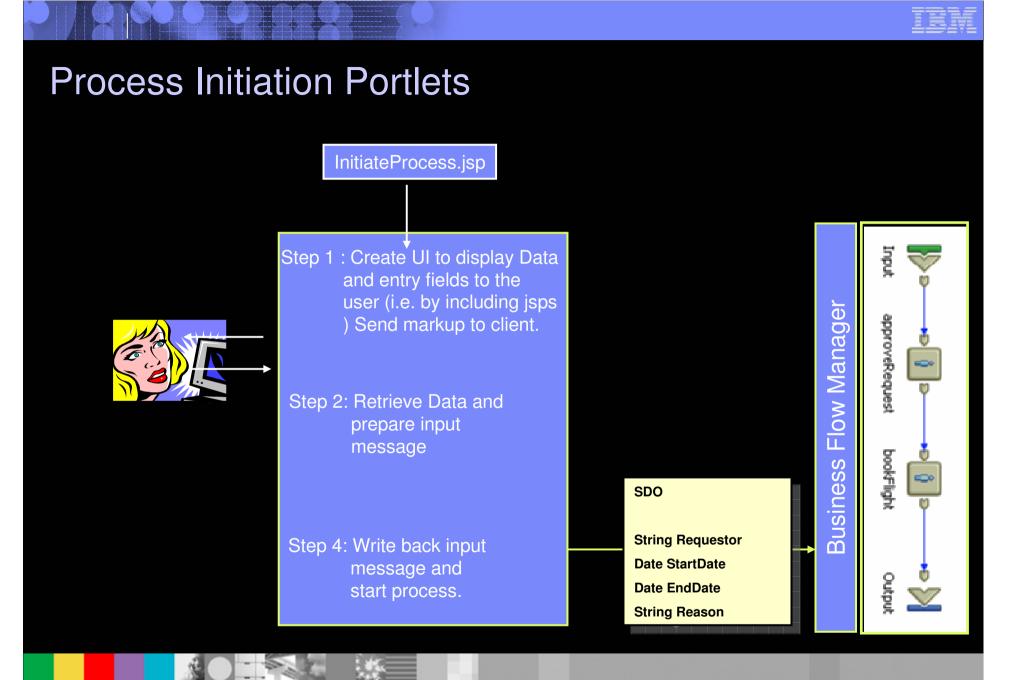
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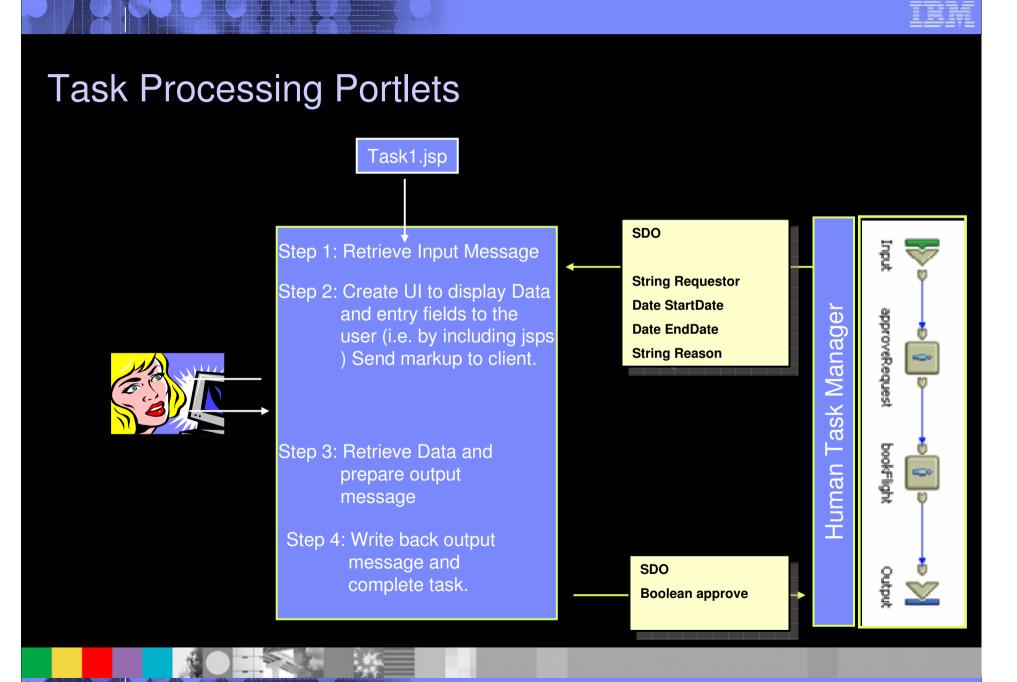
Questions ?

57

BACKUP

58









Workplace Forms and Business Process Integration

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Form only used as UI: Process Initiation Portlets

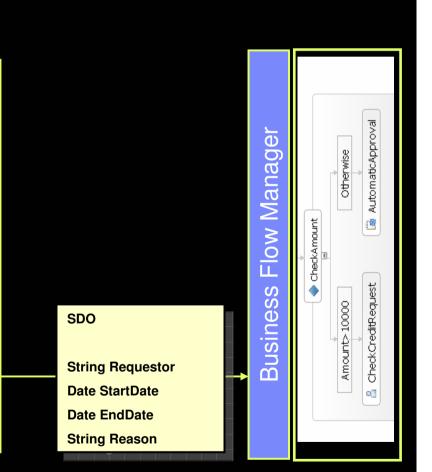


Step 1 : Load Form. Send markup to client.



Step 2: Retrieve Form. Extract data and prepare input message

Step 4: Write back input message and start process.



Form only used as UI: Task Processing Portlets

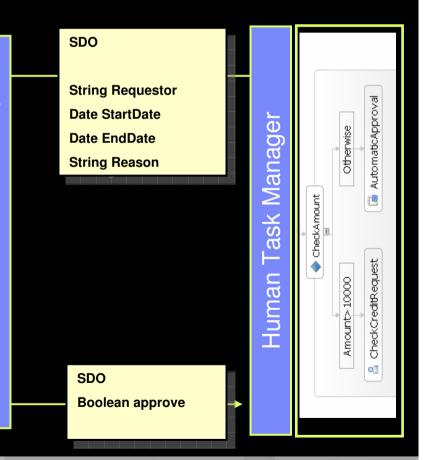


Step 1: Retrieve Input Message

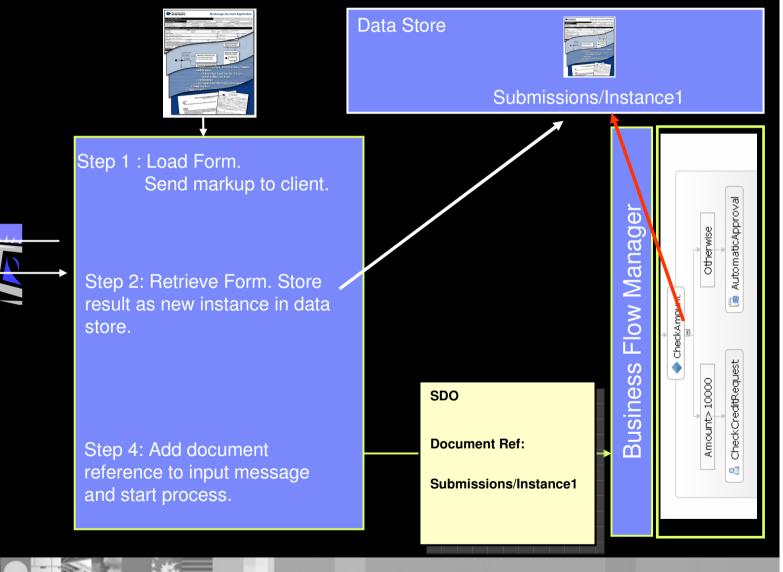
Step 2: Load form. Set some fields based on input message. Send markup to client.

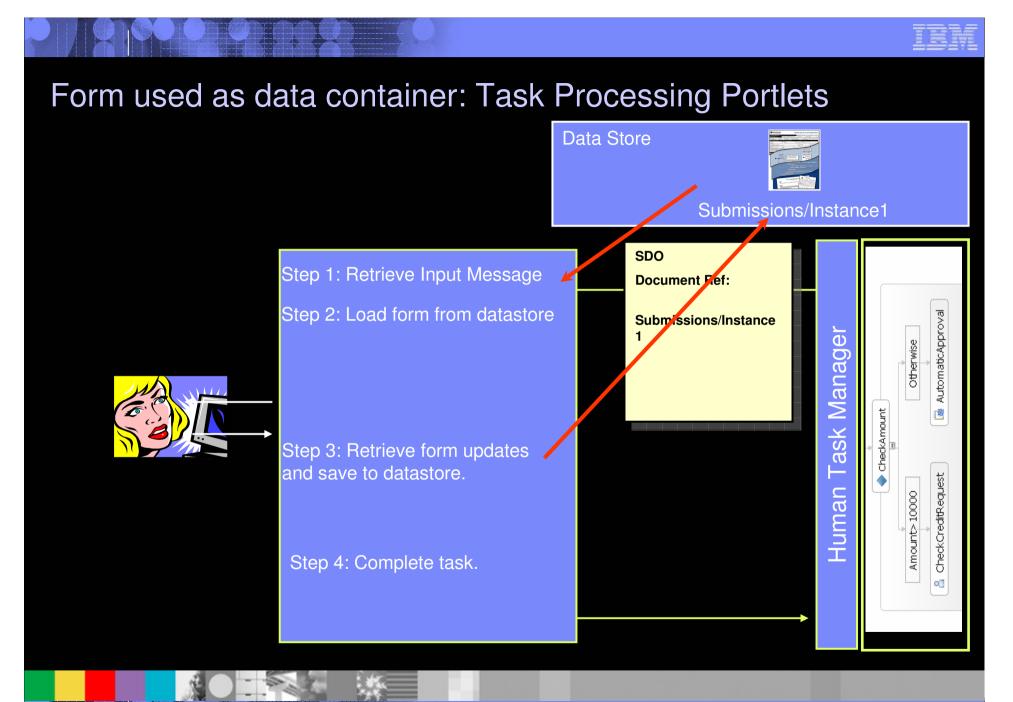
Step 3: Retrieve form. Extract data and prepare output message

Step 4: Write back output message and complete task.



Form used as data container: Process Initiation Portlets





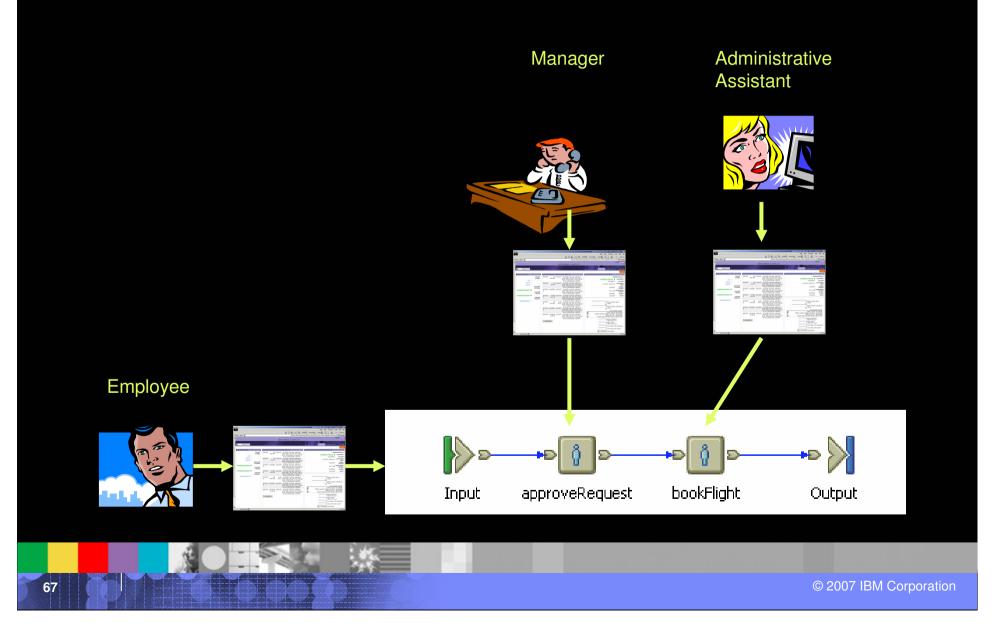


Workflow Integration Demo

Back to presentation



Scenario: Travel Approval



The Employee



The employee needs to travel to New York for a conference.

He uses a portlet on the portal's Travel Page to make a travel request.

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Destination:					
New York					
Departure Date: 25.08.2006					
25.08.2006 Reason:					
Conference					
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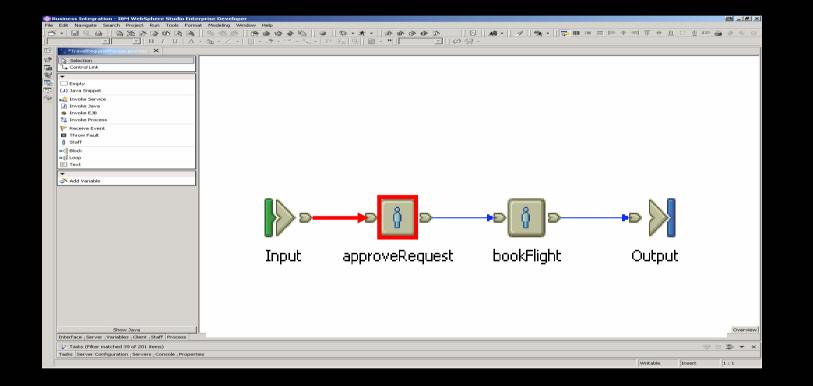
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The Travel Request Process

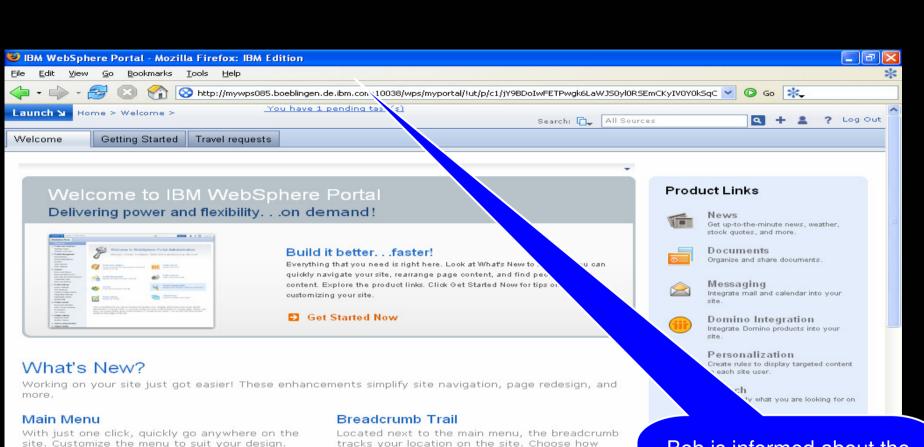




The Manager

Bob, Peter's manager works within Portal.





Quick Links

Displayed at the bottom of the site, quick links are customizable and provide one-click access to major areas of the site.

to presentation

tracks your location on the site. Choose how much detail to show in the breadcrumb.

Drag and Drop

Quickly rearrange page content. Just drag and drop a portlet to a new location.

Bob is informed about the new available tasks by an alert. A click on this alert navigates him to the task list portlet.



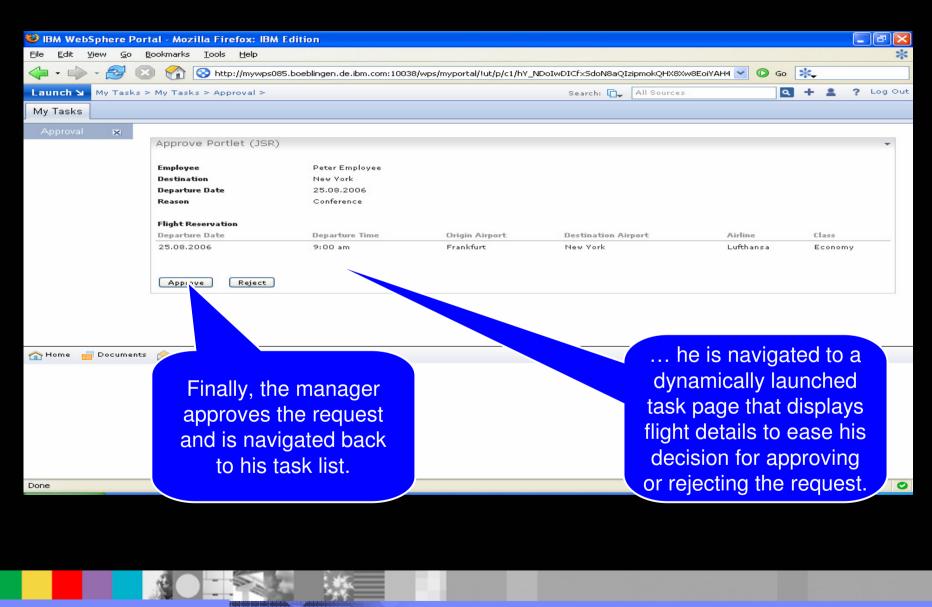
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The Employee



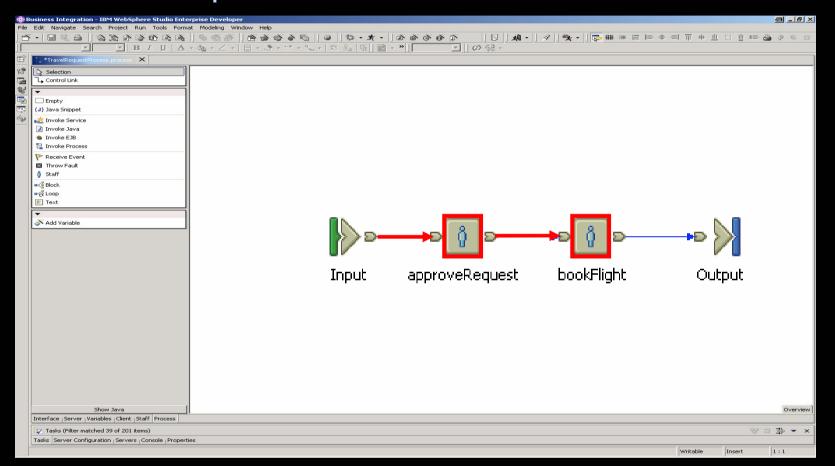
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The Travel Request Process



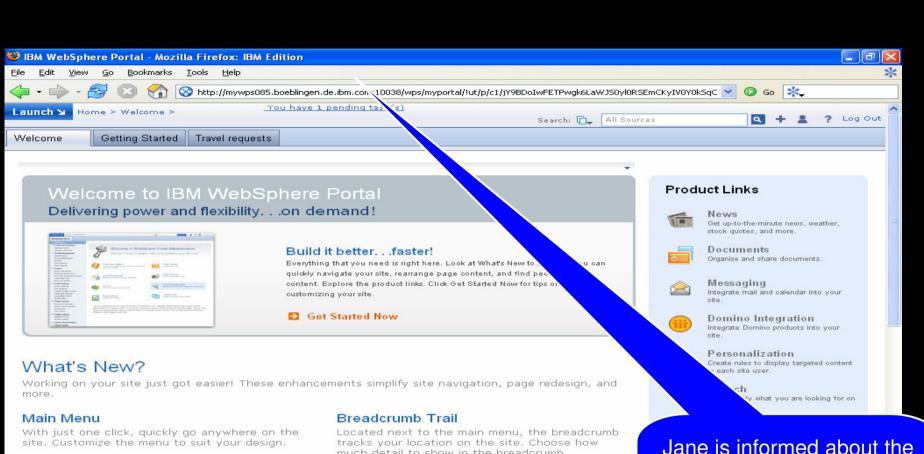


The Administrative Assistant

Jane is working within Portal.

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Quick Links

Displayed at the bottom of the site, quick links are customizable and provide one-click access to major areas of the site.

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much detail to show in the breadcrumb.

Drag and Drop

Quickly rearrange page content. Just drag and drop a portlet to a new location.

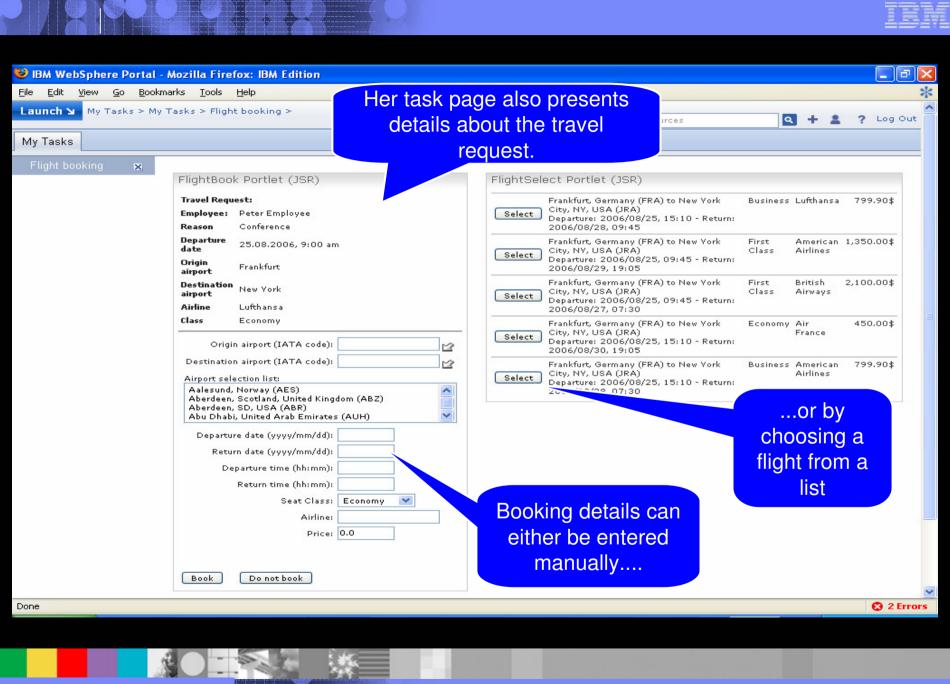
Jane is informed about the new available tasks by an alert. A click on this alert navigates her to the task list portlet.

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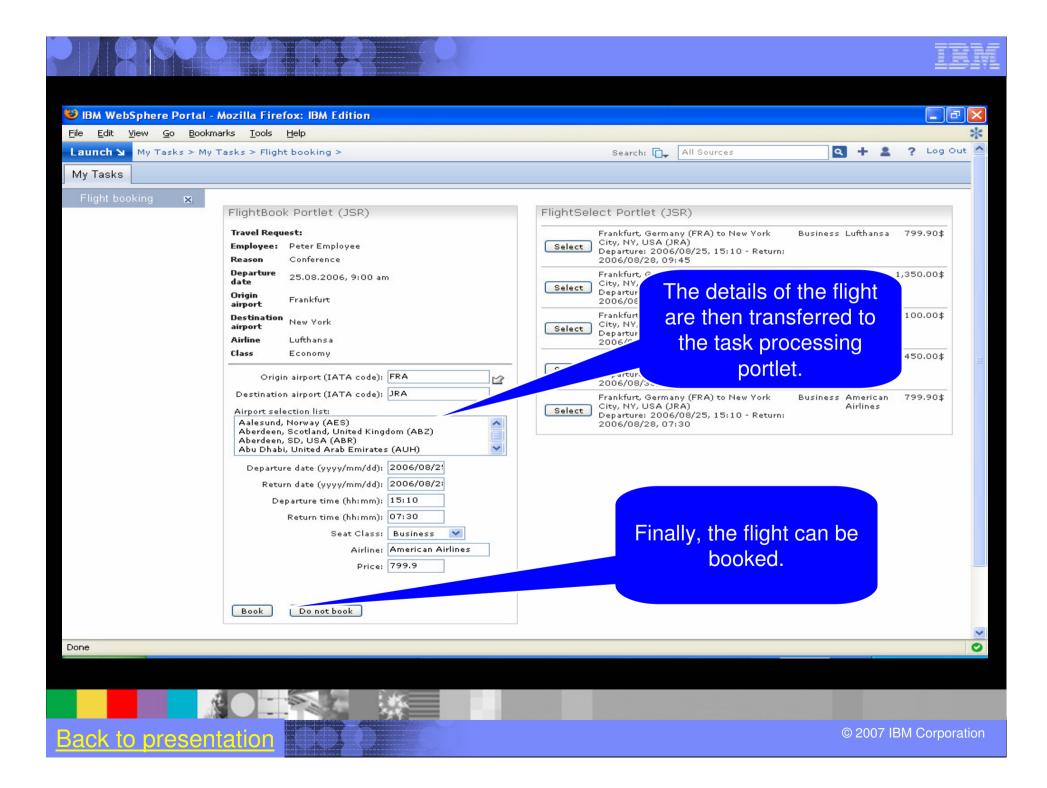
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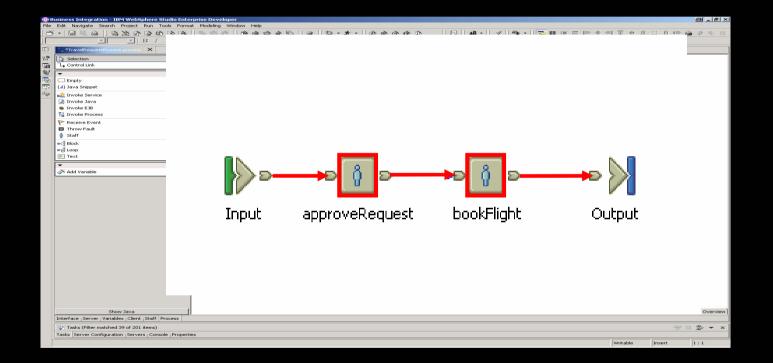
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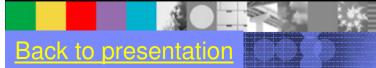


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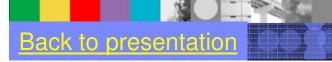


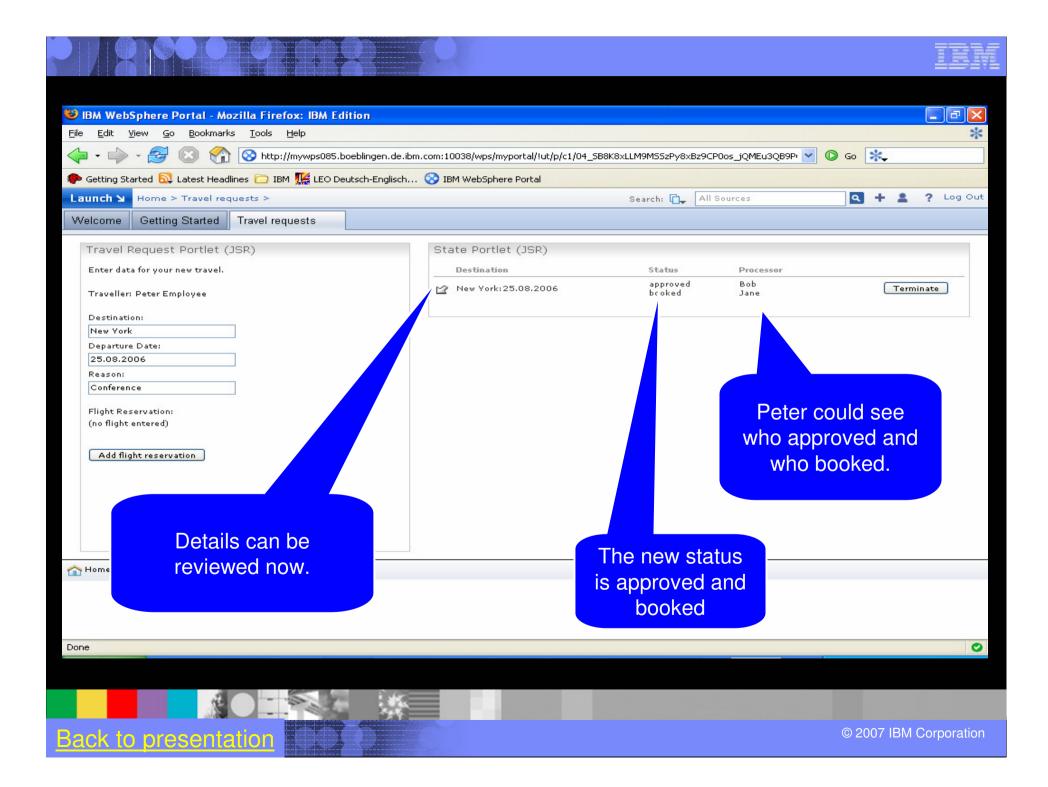


The Employee



When the Employee checks the status of his travel request the next time, he sees that his travel a has been approved and booked.





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Business User Workflow Demo

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Define the Workflow for an Application

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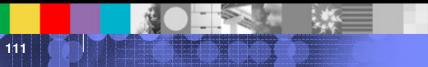
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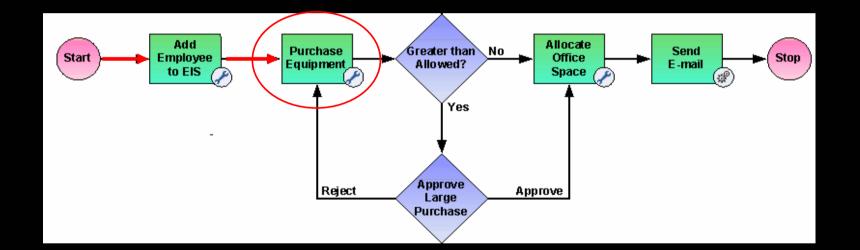
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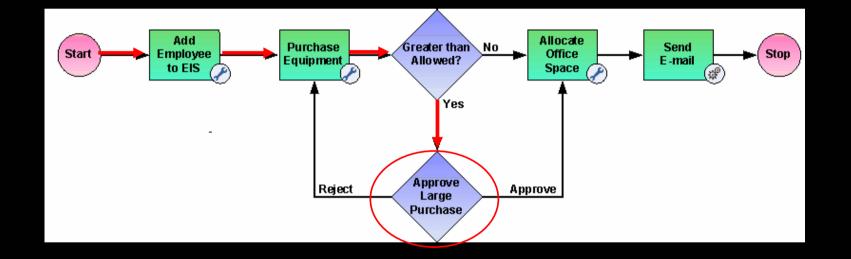
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"Bring On Board" Workflow – Where we are







Lucille, the second-line manager, logs in

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