IBM

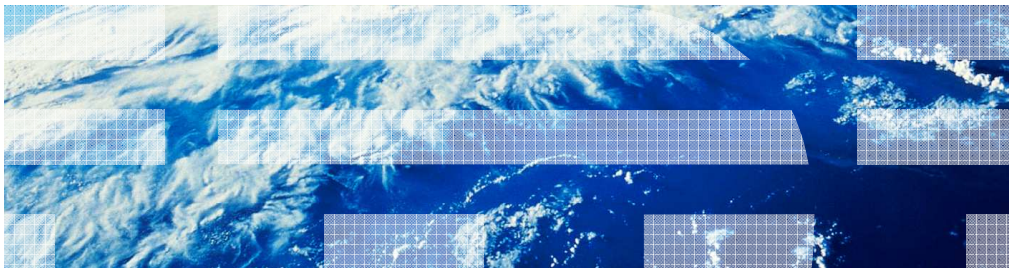# Business Process Management
# IBM Business Process Manager V7.5.1

Federated task management with IBM Case Manager work items

This presentation looks at federated task management for use with IBM Case Manager work items, using the Integrated Inbox in Business Space. This functionality is new with version 7.5.1.

## Agenda

- Introduction to the Integrated Inbox
- Architecture of federation and the Integrated Inbox
- Using the Integrated Inbox
- Overview of configuration of the Integrated Inbox

Federated task management for IBM Case Manager work items

This presentation starts with an introduction to the Integrated Inbox. The architecture for federation of task lists and the Integrated Inbox is then described. You are shown some basic elements of using the Integrated Inbox. Finally, an overview of how to configure the environment for an Integrated Inbox is presented, with references to the Information Center content that provides the details.

# *Introduction and architecture*

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This section introduces the architecture for federation and the Integrated Inbox.

## Integrated Inbox introduction

- The Integrated Inbox:
  – Combined list of BPM tasks and Case Manager work items
  – Is a space configured in Business Space
  – Opening a BPM task displays it in the Task Information widget
  – Opening a Case Manager work item
    • Opens a new browser window
    • Displays the work item in a Case Manager work details page
    • Only the edit and transfer actions are supported

- Business Space with an integrated inbox can be hosted from either server
  – BPM Advanced and Case Manager can be hosted in either server
  – BPM Standard and Case Manager can only be hosted in the Case Manager server

- The integrated inbox functionality is new in
  – IBM BPM V7.5.1
  – IBM Case Manager V5.1

The Integrated Inbox provides a unified user interface for BPM tasks and IBM Case Manager work items. It uses the Inbox widget in Business Space to display a combined list of tasks and work items. There is a template provided to configure a space containing the Integrated Inbox. When you open an IBM BPM task from the inbox, it is displayed in the Task Information widget. When you open a Case Manager work item, a new browser window opens and the work item is displayed in a Case Manager Work Details page. Only the edit and transfer actions are supported for Case Manager work items.

The Integrated Inbox can be configured from a Case Manager or BPM server that supports Business Space. Since BPM Standard does not support Business Space, the inbox must be configured on the Case Manager server when you are running BPM Standard with Case Manager. However, if you are running BPM Advanced with Case Manager, either server can be used for the inbox since BPM Advanced does support Business Space.

This functionality is new in IBM BPM version 7.5.1 and requires version 5.1 of IBM Case Manager.

Federated task management with Integrated Inbox

Federation Across Multiple Runtimes

Business Space powered by WebSphere

Federated REST API
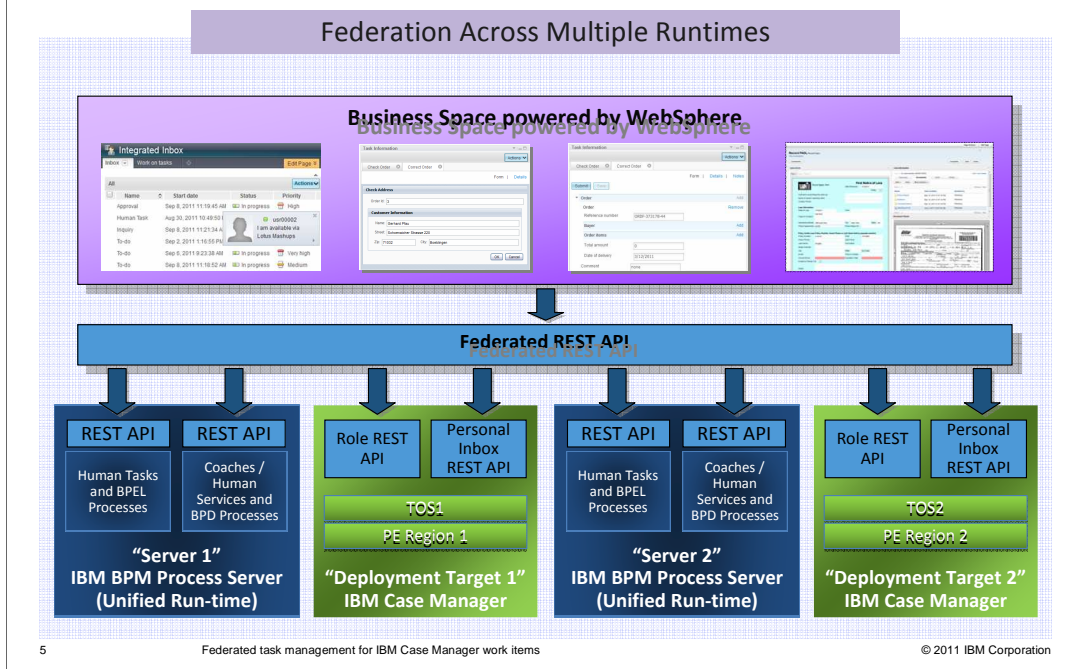
This picture depicts the architecture of federation that supports the Integrated Inbox. The inbox is configured in a business space and displays a list of tasks and work items. From your inbox you can work on these tasks and work items. When you work on a specific task or work item, the appropriate interface for that item is displayed, depending upon whether the item is a BPD task, BPEL task or Case Manager work item.

There is a federated REST API that provides a common interface to Business Space. The federated API then uses the appropriate REST API calls to the target servers when manipulating the list. The federated API also uses the appropriate REST API calls to the target server when working on a specific task or work item.

The Integrated inbox shows work items. The work items are opened in ICM work details page and the BPM Task Information widget.
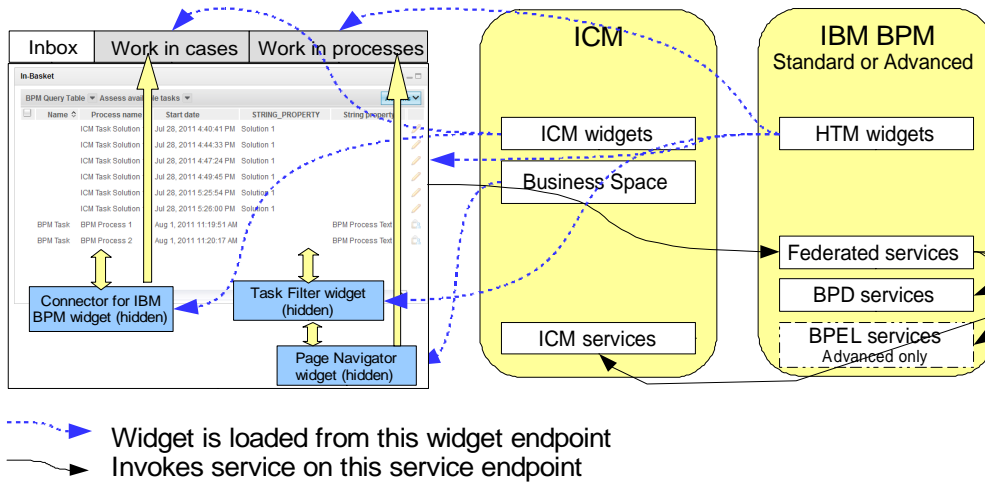
6      Federated task management for IBM Case Manager work items                    © 2011 IBM Corporation

This is a mockup of a Business Space with an Integrated Inbox. It is illustrating that, depending upon the item being worked on, the appropriate user interface is presented. The BPM Task Information widget is used for BPM tasks and the Work Details Page is used for Case Management work items.

## Architecture of Integrated Inbox in Business Space

| Inbox | Work in cases | Work in processes |

**In-Basket**

BPM Query Table ▾ Assess available tasks ▾

| | Name ⬍ | Process name | Start date | STRING_PROPERTY | String property |
|---|---|---|---|---|---|
| | ICM Task Solution | | Jul 28, 2011 4:40:41 PM | Solution 1 | |
| | ICM Task Solution | | Jul 28, 2011 4:44:33 PM | Solution 1 | |
| | ICM Task Solution | | Jul 28, 2011 4:47:24 PM | Solution 1 | |
| | ICM Task Solution | | Jul 28, 2011 4:49:45 PM | Solution 1 | |
| | ICM Task Solution | | Jul 28, 2011 5:25:54 PM | Solution 1 | |
| | ICM Task Solution | | Jul 28, 2011 5:26:00 PM | Solution 1 | |
| | BPM Task | BPM Process 1 | Aug 1, 2011 11:19:51 AM | | BPM Process Text |
| | BPM Task | BPM Process 2 | Aug 1, 2011 11:20:17 AM | | BPM Process Text |

**ICM**

ICM widgets

Business Space

ICM services

**IBM BPM**
Standard or Advanced

HTM widgets

Federated services

BPD services

BPEL services
Advanced only

Connector for IBM BPM widget (hidden)

Task Filter widget (hidden)

Page Navigator widget (hidden)

- - - ▶ Widget is loaded from this widget endpoint
——▶ Invokes service on this service endpoint

Federated task management for IBM Case Manager work items

This diagram shows the architecture for the Integrated Inbox operating in Business Space. In order for this to work there are several widgets that interact, including some hidden widgets. On the left is the Business Space showing the Inbox widget and some of the hidden widgets. The two gray tabs represent the widgets involved in working with Case Manager work items and BPM tasks. On the right is the Case Manager server and the BPM server. Note that in this scenario, the Business Space is deployed in the Case Manager server. However, it can alternatively be deployed on a BPM Advanced server. The blue dotted arrows represent where each widget is loaded from. The black solid arrows represent the flow when an item in the inbox is selected to be worked on. You can see that when an item is selected, the federated services in the BPM server are invoked. Depending upon the type of item being processed, the Federated Services invoke the appropriate services in either the Case Manager server or the BPM server.

Section

# *Using the Integrated Inbox*

Federated task management for IBM Case Manager work items

This section provides an overview of the basics for using the Integrated Inbox.

BPMv751_FTM_ICM.ppt

The Integrated Inbox

Actions to perform on selected items

In-Basket

BPM Query Table ▾ Assess available tasks ▾                                          Actions ▾

| ☐ | Name ⇕ | Process name | Start date | STRING_PROPERTY | String property | |
|---|--------|--------------|------------|-----------------|-----------------|---|
| | | ICM Task Solution 1 | Jul 28, 2011 4:40:41 PM | Solution 1 | | ✎ |
| | | ICM Task Solution 1 | Jul 28, 2011 4:44:33 PM | Solution 1 | | ✎ |
| | | ICM Task Solution 1 | Jul 28, 2011 4:47:24 PM | Solution 1 | | ✎ |
| | | ICM Task Solution 1 | Jul 28, 2011 4:49:45 PM | Solution 1 | | ✎ |
| | | ICM Task Solution 1 | Jul 28, 2011 5:25:54 PM | Solution 1 | | ✎ |
| | | ICM Task Solution 1 | Jul 28, 2011 5:26:00 PM | Solution 1 | | ✎ |
| | BPM Task | BPM Process 1 | Aug 1, 2011 11:19:51 AM | | BPM Process Text | |
| | BPM Task | BPM Process 2 | Aug 1, 2011 11:20:17 AM | | BPM Process Text | |

Click here to select 'work list' – if multiple are configured

May be from different process apps / solutions

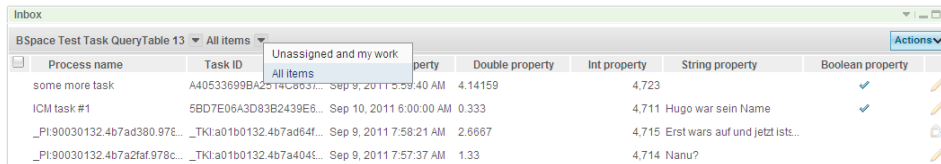Click here to filter for user interaction

A screen capture of the Integrated Inbox is shown on this slide. There are filtering capabilities provided to control what tasks and work items are displayed. BPM process applications and Case Manager solutions define work lists that you select to filter based on the criteria defined by that work list. You can further filter based on the type of user interaction that is required by the work item or task. You then select work items or tasks on which to perform some action.

The screen capture at the top shows the drop down box that enables you to select the work list that is to be applied for selecting tasks and work items for inclusion in the list. Work lists define a selection criteria to be applied and are defined in either your BPM Process Application or Case Manager solution.
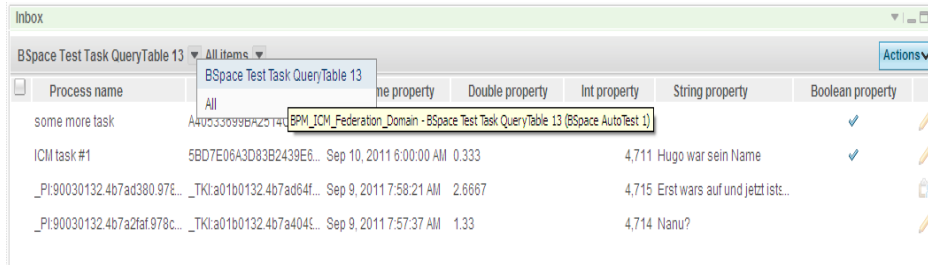
The lower screen capture shows the drop down box that enables you to select the user interaction filter to be applied. Examples of the filter choices are "Items I created", "My team's work", "Postponed items", and others. Filters actually show in the drop down box and are configured as part of the Inbox widget configuration.

Section

# *Configuration of the Integrated Inbox*

Information Center for BPM V7.5.1
http://publib.boulder.ibm.com/infocenter/dmndhelp/v7r5m1/index.jsp

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This section provides you with some basic information about how the Integrated Inbox is configured. There are many considerations for creating a Business Space with an Integrated Inbox and configuring the Inbox widget and associated widgets. Therefore, only an overview is presented here. However, links to the Information Center sections that provide the details are provided on each slide. This slide provides you with a link that defines the URL for the Information Center. The subsequent slides contain links using the titles for specific pages within the Information Center

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## Including the Integrated Inbox in Business Space

- Prerequisites in your environment
    - BPM Standard or Advanced and Case Manager are installed and configured
    - Cross-cell security is set up
    - Single sign-on is supported by BPM and Case Manager
    - Federation domains are configured for BPM and Case Manager
    - Query tables, saved searches and in-basket queries are available
    - Case Manager contains a configured Solution Space
- There are two approaches to including the Integrated Inbox in a space
    - Create the space manually
        - Need to include and correctly wire the widgets needed
    - Use the Integrated Inbox template
        - Creates a space with the Inbox widget and Work on Tasks widget
- See the Information Center for details
    - Building business spaces for integrating with IBM Case Manager

In order to define a space in Business Space containing an Integrated Inbox, there are several environmental prerequisites that must be considered. You must have the servers for BPM and Case Manager installed and configured. Cross-cell security has to be set up along with single sign-on support in all the servers. To enable federation, there must be federation domains configured for the servers. The BPM process applications and Case Manager solutions must have the query tables, saved searches and in-basket queries defined, and the Case Manager must have a Configured Solution space.

You can manually define a space containing the Integrated Inbox. Care must be taken because the interacting widgets must be wired together appropriately for everything to work. Alternatively, there is a template provided that creates a space with an Integrated Inbox, including the Inbox widget and the Work on Tasks widget. This makes configuration of the space easier and less error prone.

The Information Center page entitled "Building business spaces for integrating with IBM Case Manager" provides a more detailed explanation of how to accomplish all of these steps.

## Naming considerations when using the Integrated Inbox

- Specific conventions must be followed for saved searches, query tables and in-basket queries
- To federate properties:
  - BPM process application and Case Manager solution names must match
  - Task and work item property names correspond to saved search columns and query table and in-basket query attributes
- Business data shown in the Integrated Inbox must follow specific naming conventions
- See the Information Center for details
  - Naming considerations for federating lists of IBM BPM tasks and IBM Case Manager work items

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There are several naming considerations that must be accounted for when configuring the Integrated Inbox. First, query table, saved search, and in-baskets query names must be the same and must comply with a specific set of rules. In order to federate properties of tasks and work items, the BPM process application and Case Manager solution that share the inbox must have matching names. In addition, the task and work item property names must correspond to the saved search columns, query table attributes and in-basket query attributes.

You might also want to include business data, such as customer information, in the Inbox widget. You can add business data to the various queries that you use to create the federated lists of tasks and work items. When you include business data attributes in the federated results, you must know how the business data is defined in IBM BPM and IBM Case Manager. Then you must follow a specific set of naming conventions in the queries and searches so that they can access the appropriate data.

The Information Center page entitled "Naming considerations for federating lists of IBM BPM tasks and IBM Case Manager work items" provides a more detailed explanation of these naming conventions and requirements.

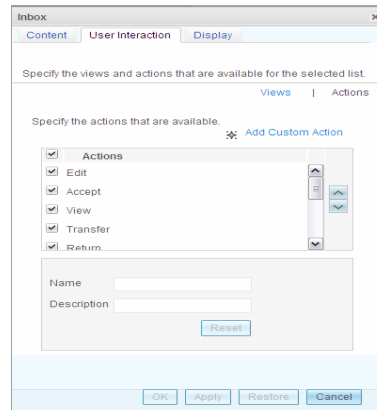## Enabling the Case Manager solution

- Case Manager solutions have in-baskets
  - One or more role based in-baskets
  - An optional personal in-basket

- In-baskets must be properly configured for work items to show in the federated list
  - Specific custom attributes must be defined
    - Identify the in-basket query
    - Identify the solution in Business Space
  - Columns and labels to display the work items
  - Indexes for sorting on property values

- See the Information Center for details
  - Enabling IBM Case Manager solutions for use in Business Space

Federated task management for IBM Case Manager work items

A Case Manager solution must contain at least one role based in-basket. The solution can also contain additional role based in-baskets for different roles and optionally can contain a personal in-basket. In order for the work items associated with these in-baskets to be seen in the federated list of the Integrated Inbox, the in-baskets must conform to a set of rules. There are a couple of custom attributes that must be defined. These are used to identify the in-basket query used to populate the in-basket and to identify the solution in Business Space. The specific columns to be displayed along with their labels must be defined. Also, the indexes used to sort on property values need to be defined.

The Information Center page entitled "Enabling IBM Case Manager solutions for use in Business Space" provides a more detailed explanation of these requirements.

Example: The panel for views and action

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The Inbox widget must be configured to define the content, specifying which lists and properties are available. The views used for filtering and the actions that can be taken on selected items must also be defined, which is shown in the screen capture on this slide. There is also a mechanism for defining custom actions. There are some display options, enabling you to configure if the Inbox uses a table or list format, how BPM tasks are sorted based on priority, and whether automatic refresh is enabled.

The Information Center page entitled "Configuring the Inbox widget" provides a more detailed explanation of how to do this.

## Summary

- Introduction to the Integrated Inbox
- Architecture of federation and the Integrated Inbox
- Using the Integrated Inbox
- Overview of configuration of the Integrated Inbox

In this presentation, you were provided with an introduction to the Integrated Inbox. The architecture for the federation of task lists and the Integrated Inbox was then described. You were shown some basic elements of using the Integrated Inbox. Finally, an overview of how to configure the environment for an Integrated Inbox was presented, including references to the Information Center content that provides the details.

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