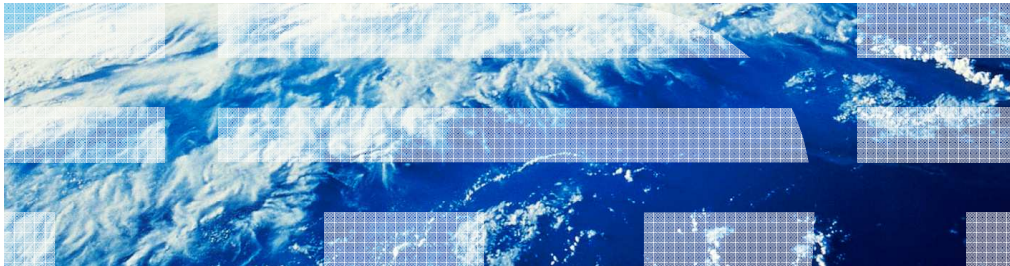

Business Process Management IBM Business Process Manager V7.5

Federated task management overview



This presentation gives you an overview on the federated task management feature in IBM Business Process Manager version 7.5, including federation with IBM Case Manager that is available in version 7.5.1.

Agenda

- Task management in heritage products
 - WebSphere Lombardi Edition V7.2
 - WebSphere Process Server V7.0
 - IBM Case Manager V5.0

- Federated task management
 - Architecture
 - Business space templates and widgets

- Federation within BPM
 - Human centric and integration centric business processes work together
 - REST service endpoint settings

- Federation with BPM and IBM Case Manager
 - Integrated Inbox template
 - REST API and configuration architecture picture

In releases before BPM version 7.5, IBM business process management products independently have their own ways to manage processes and cases. This presentation first goes over some traditional task management approaches in three IBM heritage products, including WebSphere Lombardi Edition version 7.2, WebSphere Process Server version 7.0, and IBM Case Manager version 5.0.

As those products are integrated in BPM version 7.5, the new federated task management feature gives the business user an integrated user experience across the IBM BPM portfolio. The federated task management introduction section shows an architectural view on how the business space uses a federated API to work with multiple servers and multiple systems. Then you are given further details of the new space templates and widgets, which can help you get familiar with the task management capabilities.

After the introduction, you learn two federation scenarios. One is the federation within the BPM product, and another is the federation between BPM and IBM Case Manager that is available in version 7.5.1.

Task management in heritage products

The following slides look at task management as implemented in the heritage products.

Task management using Process Portal and Process Designer Inspector

- Business process definition, human service, and coach are authored in the Process Designer

The image illustrates the workflow for task management. On the left, the **Process Designer Inspector** window shows a process diagram with a 'Receive Work Request' task highlighted. A red dashed arrow points from this task to a **Coach form** window on the right, which contains a 'Work Request Form' with fields for 'Work Request Number', 'Description', 'Status', and 'Priority'. Another red dashed arrow points from the 'Coach form' to the **BPM Process Portal** window at the bottom, which displays a 'Federated task management overview' with a table of instances.

4 Federated task management overview © 2011 IBM Corporation

In WebSphere Lombardi Edition version 7.2, the process developer creates the business process definitions and human services using the Process Designer tool.

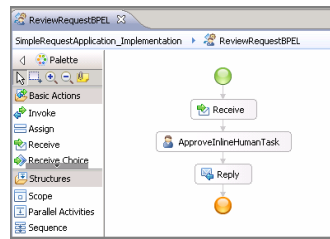
There are two ways to run the processes and manage the tasks. The first is with the Process Designer Inspector. The Inspector is a built-in tool for initiating, running and interacting with the business process definitions. Since it is built into the Process Designer, this is where early testing of the services and process flow is done.

As the project moves to the testing and quality assurance phase, there is a need to run and manage the business processes from many users and on different servers. This is where the IBM BPM Process Portal comes into play. The BPM Process Portal is a web application that manages business process definitions that are deployed on a process center server or a process server. Using the Process Portal, the business users can complete the tasks of the deployed processes in a runtime environment.

With both methods, the business user interacts with the coach forms which are displayed in a separate web browser.

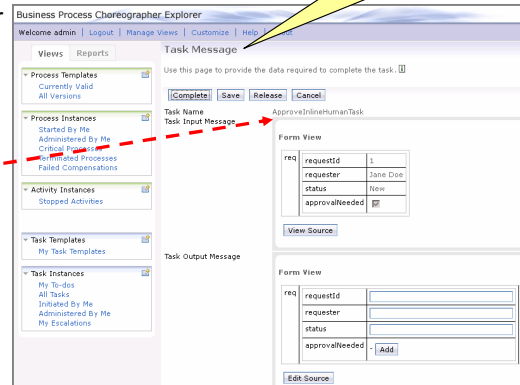
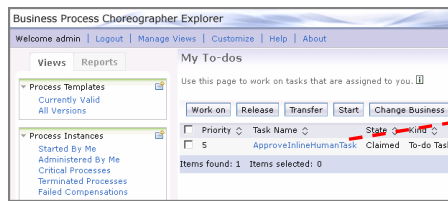
Task management using BPC Explorer

- BPEL and human task created in the WebSphere Integration Designer



Human Task form

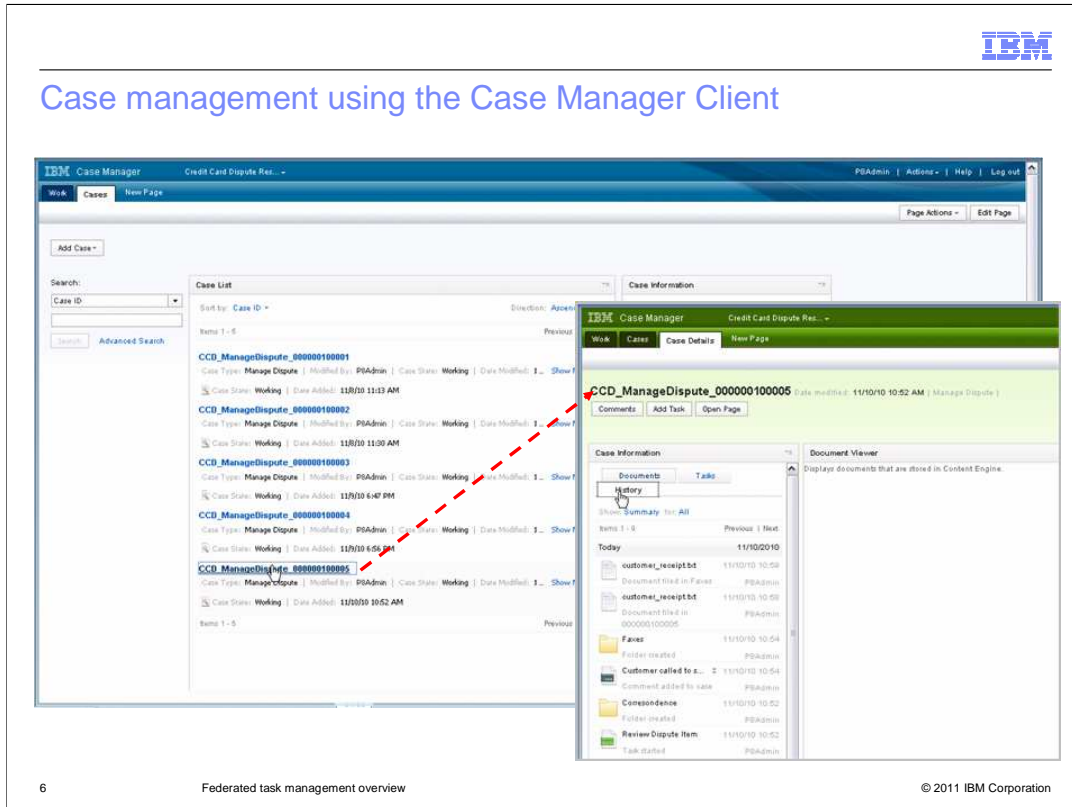
- Business Process Choreographer Explorer



The Business Process Choreographer (BPC) Explorer is a web application that comes from the WebSphere Process Server heritage. It is used to initiate, run and manage SCA based BPEL business processes that are created in the Integration Designer tool. In BPM version 7.5, the BPC Explorer can also be used to test the new Advanced Integration Services that are implemented in the Integration Designer.

The business user can start a BPEL process instance or invoke a service from the BPC Explorer. The user can perform various actions on the tasks, for example: complete task, transfer it to another user, or escalate the task to a higher level. When working on human tasks, the forms are shown in the BPC Explorer “Task Message” page, which provides a simple, ready-to-use web user interface based on a set of default Java Server Pages.

Case management using the Case Manager Client



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Federated task management overview

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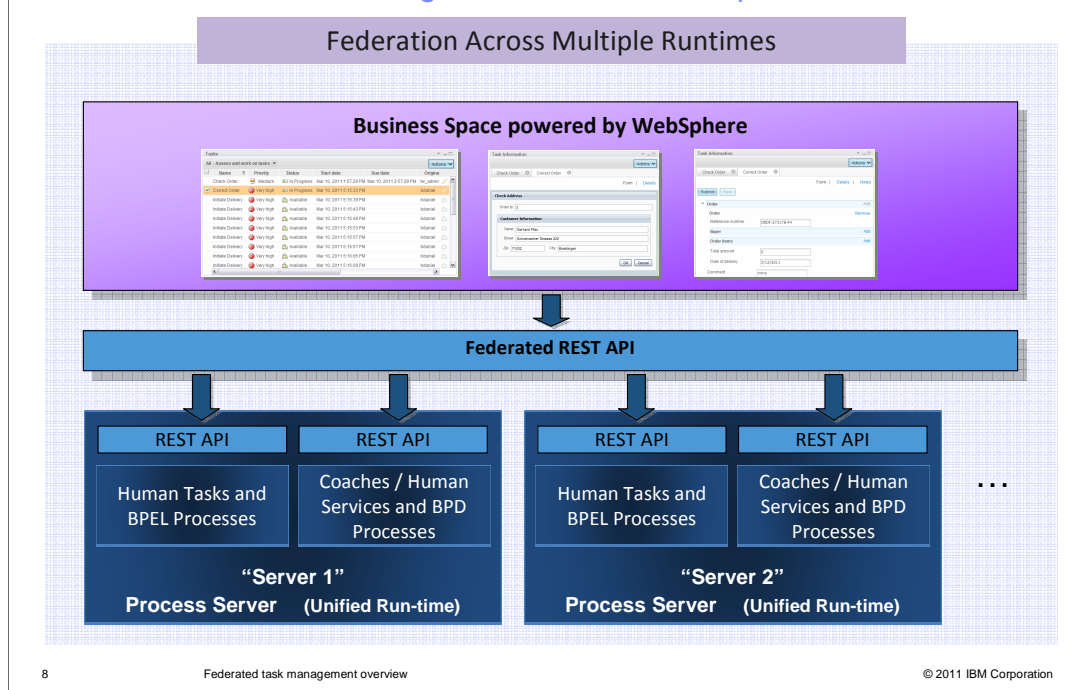
IBM Case Manager version 5.0 simplifies the job of designing and building a case management system and provides a graphical user interface for case workers to easily manage cases. With IBM Case Manager, you design a case management solution that is based on closely related cases and then deploy that solution into a production environment. The screen capture on this slide shows the Case Manager Client. It is a web-based application that case workers use to complete their work for each case. Before the Case Manager Client is deployed into production, business analysts can modify the application to customize it.

The screen capture also shows an inbox with a list of cases that the case worker is managing. The inbox has various search capabilities to filter the list of cases based on different criteria. From the inbox, you can open a case to work on it. In the example shown, you can see that the case history is displayed. From here, you are able to select specific items in the history to review. Also from this page, you can examine documents associated with the case, work on tasks that are not yet complete and add new tasks that are needed for the case to progress.

Federated task management

This section provides an introduction to federated task management, including its architecture, heritage product history and the business space templates and widgets.

V7.5 federated task management in Business Space



In BPM version 7.5, the traditional approaches continue to be supported along with their individual runtimes. In addition, BPM version 7.5 introduces a new federated task management feature in the business space. It enables the business user to have a single user experience for interacting with processes and tasks from multiple IBM Business Process Manager systems, or across multiple process servers.

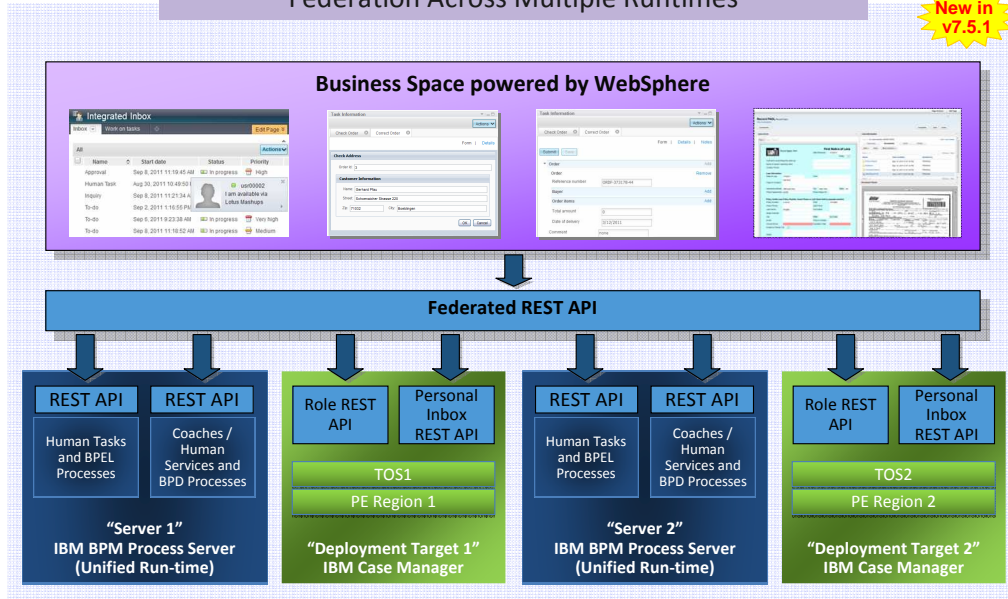
Shown here is an architectural overview of the federated task management design. The federated REST APIs are designed to access different categories of resources using queries. The queries are propagated to the individual systems. The federated REST API is mapped to the Business Process Definition REST service and the Business Process Choreographer REST service on each server. The query result sets from the individual systems that are merged and sorted into a single result set.

In the federated configuration, you can view, filter, and sort tasks or processes in a single list, regardless of the process server or where they are stored. You can select one or more items in lists of processes, tasks, or task definitions and perform various actions. You can work with multiple tasks and processes in parallel. And you can also interact with a task or process in the business space.

V7.5.1 federated task management in Business Space

Federation Across Multiple Runtimes

New in v7.5.1

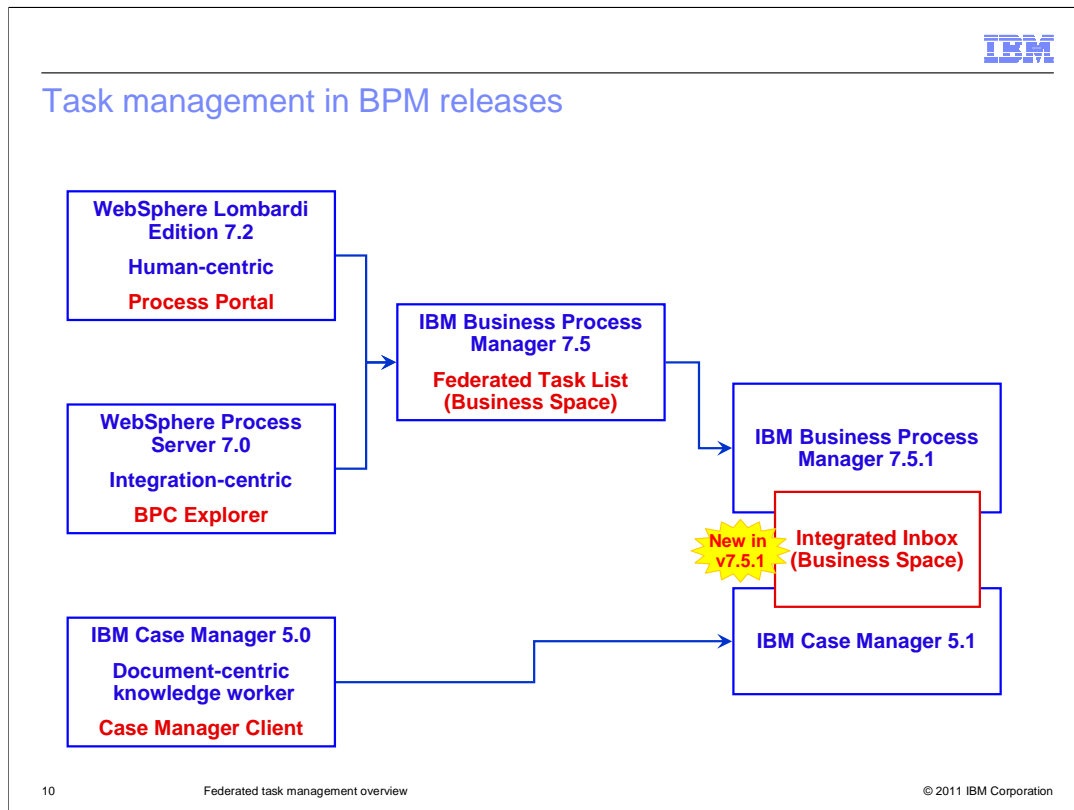


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Federated task management overview

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New in version 7.5.1, federation with IBM Case Manager solutions is also supported. The business user can view a combined list of IBM Business Process Manager tasks and IBM Case Manager work items in one integrated inbox space. This diagram shows how the architecture using the federated REST APIs has been expanded to include integration with Case Manager.



Here you see another view of the federated task management feature in BPM from the product release perspective.

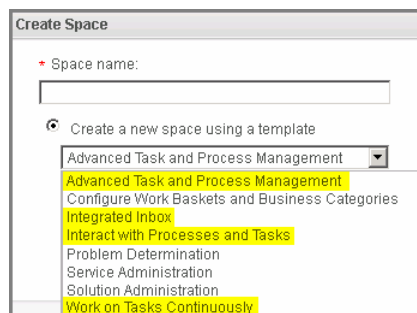
The WebSphere Lombardi Edition version 7.2 leads on the strength of the human-centric BPM. The WebSphere Process Server version 7.0 focuses more on the integration-centric BPM. With the combination of these two products in BPM version 7.5, the federated task listed in the business space enables the business users working with human tasks from both business process definitions and BPEL processes.

IBM Case Manager version 5.0 leads on the strength of document-centric BPM involving knowledge workers. BPM version 7.5.1 enables integration with IBM Case Manager version 5.1. The Integrated Inbox provides a federation capability to view BPM tasks, BPEL processes and case manager work items in a single task list. Note that the IBM Case Manager runtime is not combined with the BPM runtime.

The Integrated Inbox in business space might be hosted in the BPM process server, or it might be hosted in the case manager server.

Business space templates

- Task management space templates




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Federated task management overview

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Several business space templates are delivered with BPM version 7.5 to help you create a task management related business space. These templates support specific usage patterns for working with and managing tasks and processes. The widgets from the templates can support business process definitions that were authored in Process Designer, and BPEL processes and human tasks that were authored in Integration Designer.

The “Interact with Processes and Tasks” template provides a basic work inbox for people to create new processes and services, and work on assigned tasks.

The “Advanced Task and Process Management” template enables business users and team leads to work on tasks, collaborate with other people, organize the task lists, and check the status of processes.

The “Work on Tasks Continuously” template is convenient for users who work on tasks in a queue. When the users complete tasks, they get the next available task in the queue assigned to them automatically.

New in BPM version 7.5.1, the “Integrated Inbox” template has BPM tasks, BPEL human tasks, and IBM Case Manager work items delivered in the user’s inbox.

Work with tasks in the space

- Multiple pre-configured task widgets

The screenshot displays a web-based task management interface with several key components:

- Task Definitions widget:** A list of task definitions with columns for Name, Description, Due date, Priority, Status, and Start.
- Tasks widget:** A table of active tasks, including 'Approval', 'Approve/Review Task', and 'Review', with columns for Name, Description, Due date, Priority, Status, and Start.
- Task Information widget:** A detailed view of a task, showing 'Work Request Form' and 'The Work Request' details.
- Integrated Inbox widget:** A list of tasks in an inbox, including 'Approval', 'Human Task', 'Inquiry', and 'To-do' items, with columns for Name, Start date, Status, and Priority.
- ICM Work Details page:** A separate window showing detailed information for a specific work item.

12 Federated task management overview © 2011 IBM Corporation

The federated task management space provides multiple pre-configured task widgets for different interaction scenarios.

In this example, which uses the “Interact with Processes and Tasks” business space template, you can select the invocation task from the “Task Definitions” list to invoke the business process.

Once the human tasks are ready for you to work on, they are displayed in the “Tasks” list. You can perform various actions on the selected items. If you accept to work on the human task, you can interact with the task forms in the “Task Information” widget.

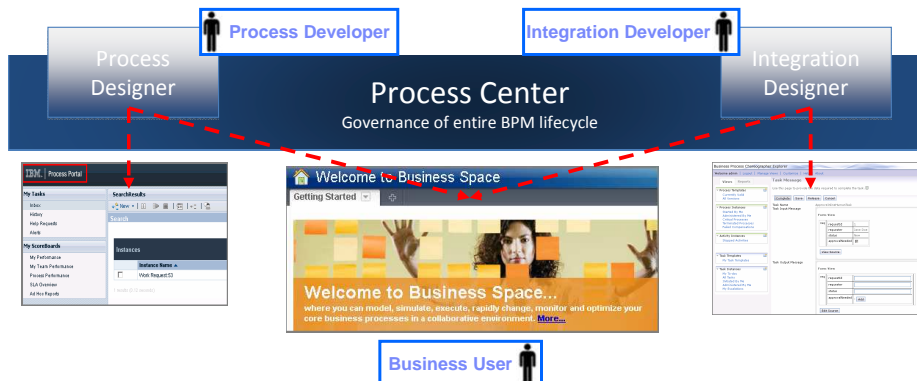
In the “Integrated Inbox” space, The BPM tasks and Case work items are all listed in the user’s inbox. The Sametime feature is also integrated with the inbox widget. If you open an IBM BPM task, the form is displayed in the Task Information widget. If you open an IBM Case Manager work item, the work item is displayed in an IBM Case Manager Work Details page in a new browser window.

Federation within BPM

Federation within the BPM version 7.5 product is discussed in this section.

Federation within BPM

- Work with human centric business processes that come from both Process Designer and Integration Designer



To enable federated task management for business process definitions and human services, see [Federated task management for business process definitions](#)

To enable federated task management for BPEL processes and human tasks, see [Federated task management for BPEL processes and human tasks](#)

In BPM version 7.5, the business user can use the business space to interact with business processes and tasks developed with different BPM authoring tools.

The business process developer defines the business process definitions and human services in the Process Designer. The integration developer uses the Integration Designer to create BPEL processes and human tasks. Once the business applications are deployed on to the BPM process center server, the business-users can interact with the processes and tasks using the federated task list inside a single business space.

For the implementation details on how to enable federation features for BPDs, see the “Federated task management for business process definitions” presentation.

For the implementation details on how to enable federation features for BPEL processes and human tasks, see the “Federated task management for BPEL processes and human tasks” presentation.

Links to these presentations are provided on the slide.

REST endpoint settings for BPM Federation

- REST service endpoint settings for Business Space in administrative console
 - Business process definition engine REST services
 - Business Process Choreographer REST services
 - Federated REST services

- By default the Federated REST services are configured for both process and task services

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Federated task management overview

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To work with BPM processes and tasks in the business space, you need to choose the appropriate REST service endpoint. There are three REST services provided to access processes and tasks in the business space.

If your user groups only access the business processes and tasks authored in the Process Designer, choose the Business process definition engine REST services. If your user groups only need to access the BPEL processes and human tasks modeled in the IBM Integration Designer, use the Business Process Choreographer REST services. If your user groups need to interact with the processes and tasks from both authoring environments or across multiple systems, you should choose the Federated REST services.

A BPM profile is by default configured to use the Federated REST services.

The configuration of the REST service endpoint is performed using the WebSphere Process Server administrative console. You select the server where the business space is deployed. On the server configuration page, click “Business Space configuration” in the Business Integration section, and then click REST service endpoint registration. Inside the registration table, you select the appropriate REST service endpoint for process and task services.

Federation with BPM and IBM Case Manager

Federation between the BPM version 7.5.1 product with IBM Case Manager version 5.1 is discussed in this section.

Integrated Inbox - Federation of BPM with IBM Case Manager

- Integrated Inbox
 - Combines list of BPM tasks and Case Manager work items
 - Is a space configured in Business Space using a template
 - 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 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 in this case.

The Integrated Inbox can be configured from a BPM or a Case Manager 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.

Integrated Inbox

Actions to perform on selected items

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

May be from different process apps / solutions

Click here to filter for user interaction

Name	Process name	Start date	STRING_PROPERTY	String property
ICM Task Solution 1	ICM Task Solution 1	Jul 28, 2011 4:40:41 PM	Solution 1	
ICM Task Solution 1	ICM Task Solution 1	Jul 28, 2011 4:44:33 PM	Solution 1	
ICM Task Solution 1	ICM Task Solution 1	Jul 28, 2011 4:47:24 PM	Solution 1	
ICM Task Solution 1	ICM Task Solution 1	Jul 28, 2011 4:49:45 PM	Solution 1	
ICM Task Solution 1	ICM Task Solution 1	Jul 28, 2011 5:25:54 PM	Solution 1	
ICM Task 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	

- For configuration and use of the Integrated Inbox, see [Federated task management for IBM Case Manager work items](#)

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 can define work lists which you then select to filter based on the criteria for that process application or solution. 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 link on the bottom of the slide brings you to a presentation that provides more information on the use and configuration of the Integrated Inbox.

Summary

- Individual task management approaches from three products
- Business Space federated task management
- Federation within BPM
- Federation with BPM and IBM Case Manager



In this presentation, you first went over the individual task management approaches from three IBM heritage business process management products.

Then you were introduced to the new federated task management feature, which gives the business user a single user experience for interacting with processes and tasks from multiple BPM systems, or across multiple process servers.

You were presented the architectural picture and learned how to choose the appropriate templates for your business needs. A few federated task widget examples helped you get familiar with federated task management capabilities.

In the last section, you got more information on federation within BPM and federation between BPM and IBM Case Manager.

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