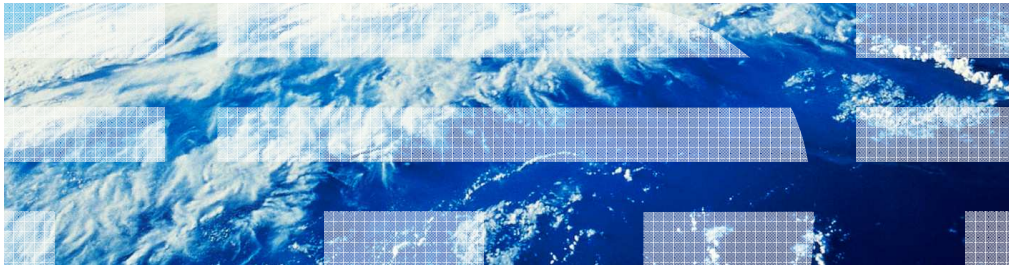


Business Process Management

IBM Business Process Manager V8.0.1

Enhancements to coaches



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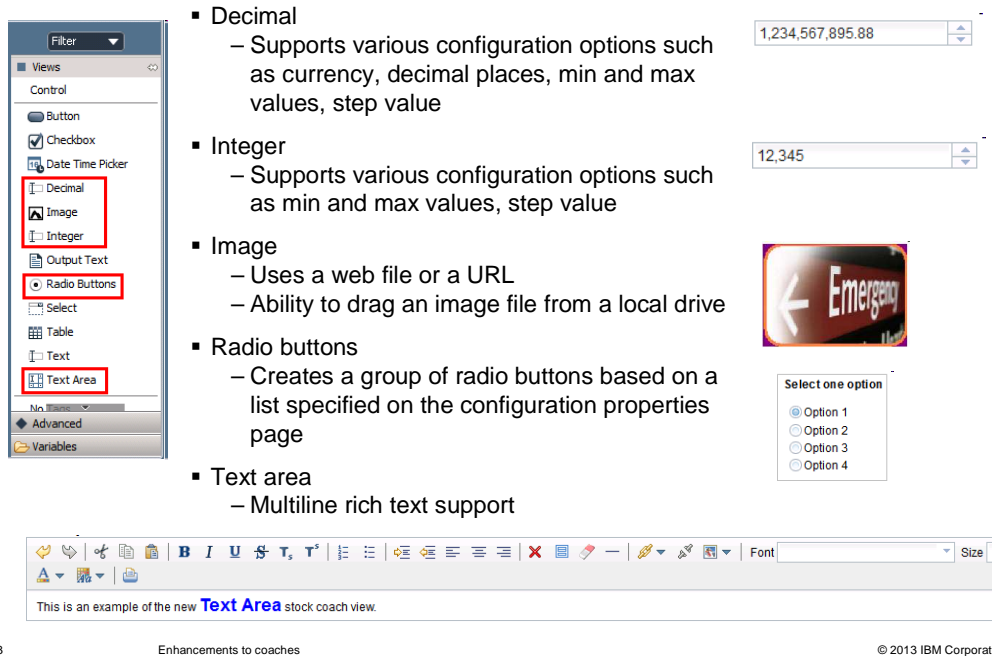
IBM Business Process Manager version 8.0 introduced completely redesigned coaches that allow you greater flexibility in creating sophisticated coaches with Web 2.0 appearance and behavior. This presentation will give you an overview of enhancements done to the new coaches in version 8.0.1 to further improve usability.

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You will learn about the new stock coach views, updated palette categorization for easier navigation, smarter coach view and data binding support, various enhancements to configuration options and the ability to use coach dashboards in WebSphere Portal.

New stock coach views



The image shows a software palette on the left with the following views listed: Filter, Views, Control, Button, Checkbox, Date Time Picker, Decimal, Image, Integer, Output Text, Radio Buttons, Select, Table, Text, Text Area, No, Advanced, and Variables. The Decimal, Image, Radio Buttons, and Text Area views are highlighted with red boxes. To the right, there are four runtime examples: a Decimal view showing '1,234,567,895.88' with a spinner; an Integer view showing '12,345' with a spinner; an Image view showing a red 'Emergency' sign; and a Radio buttons view titled 'Select one option' with four radio button options (Option 1 to Option 4). At the bottom, a Text Area view is shown in edit mode with a rich text toolbar and the text 'This is an example of the new Text Area stock coach view.'

- **Decimal**
 - Supports various configuration options such as currency, decimal places, min and max values, step value
- **Integer**
 - Supports various configuration options such as min and max values, step value
- **Image**
 - Uses a web file or a URL
 - Ability to drag an image file from a local drive
- **Radio buttons**
 - Creates a group of radio buttons based on a list specified on the configuration properties page
- **Text area**
 - Multiline rich text support

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Five new stock coach views are added as shown in the palette screen capture on the left.

You can use the decimal stock coach view to create a field for inputting numbers with decimal places. This view has configuration options for specifying currency, decimal places, minimum and maximum values, step value, and so on. The currency is used only for determining the currency symbol, thousands separators and decimal places that are displayed in the field at runtime. The currency is not used for any calculation purpose, for example, currency conversion. When no currency is specified, the number of decimal places is restricted to the value specified for the decimal places configuration option. If neither is specified, then the number of decimal places is restricted to two. When you specify minimum and maximum values, the input number is validated to ensure that it is within the range. When you specify a step value, a spinner with up and down arrows is shown at runtime. Clicking the up or down arrow increases or decreases the value by the step value.

The Integer stock coach view is used for numbers without decimal places. This coach view also has configuration options for minimum and maximum values and step value, and its behavior is the same as the decimal stock coach view.

The image stock coach view makes it easy to add an image to a coach from a web file or from a URL. You can also drag an image file from a local drive and drop onto a coach view or a coach canvas. This will add the image file as a web file, create an image coach view on the canvas, and bind the image coach view with the newly created web file. Configuration options of this view allow you to specify a description, height and width, a caption, and caption position for an image.

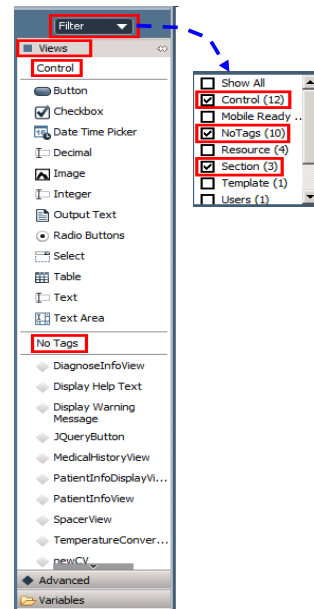
The radio buttons stock coach view allows you to create a set of radio buttons of which one can be selected. The view is bound to a data item that represents the current selection. The list of options to be displayed as radio buttons is derived from configuration options Selection Service or Selection List. With the Selection Service option, you can specify an Ajax service that returns a list of options. When both Selection Service and Selection List are specified, the radio button options presented are a union of both. The radio buttons can be displayed horizontally or vertically using the configuration option Layout.

The Text Area coach view allows multiline input. It also supports rich text formatting. You have to explicitly state if the view can have plain text or rich text by using the Text Area Type configuration option. If you select "Rich Text", the text box displays a toolbar with various formatting options when in edit mode at runtime.

Runtime representation of decimal, integer, image and radio buttons views is shown on the right. The text area view in an edit mode is shown at the bottom.

Enhanced palette categorization

- Reduced number of drawers resulting in easier scrolling
- All coach views under “Views” drawer
- Multiple categories under “Views” drawer – each representing a tag
- Control, No Tags and Section categories shown initially by default
- Ability to show/hide categories using Filter



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Enhancements to coaches

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In version 8.0, a palette drawer is created for each tag assigned to a coach view. When there are many tags and therefore many drawers, it gets difficult to navigate in the palette. To address this issue, in version 8.0.1, the palette is arranged differently. It now has only one drawer - Views - that contains all stock and custom coach views. The Views drawer has multiple categories, each category representing a tag. Control, No Tags, and Section categories are shown by default when the palette is initially launched. You can show or hide categories based on what you want to see in the palette using the filter.

The screen capture on the right shows a palette with default categories. The filter drop down menu is shown besides the palette.

The Advanced drawer remains the same as version 8.0.

Smarter support for coach view and data binding (1 of 4)

- New option “Show matching variables only” in the variable selection popup
 - Selected by default resulting in only the matching variables being shown
 - When deselected, all variables are shown with the matching ones in bold

The image contains three numbered screenshots of the IBM BPM Coach View Editor:

- 1 Coach view editor:** Shows the 'Variables' tab with a tree view of 'Business Data'. The 'patient (PatientInformation)' variable is selected, and its properties (basicInfo, address, healthCardNumber, age, gender, familyPhysicianInfo, creditCardNumber, expirationDate) are listed below. A callout points to the 'patient' variable with the text 'Variable available in the coach view'.
- 2 Coach view editor:** Shows the 'Layout' tab with a 'Text' coach view instance selected. The 'Properties' view shows the 'Binding' property set to 'Text'. A callout points to the 'Binding' property with the text 'New option selected by default'.
- 3:** Shows the variable selection popup. The 'patient (PatientInformation)' variable is selected, and its properties are listed. The 'Show matching variables only' checkbox is checked. A callout points to this checkbox with the text 'Only matching variables shown by default to select from'.

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Smarter coach view and data binding support provides some neat enhancements.

When binding a coach view with data using the Select button in the Properties view, a variable selection popup is presented to you. In version 8.0.1, this selection popup has a new option “Show matching variables only.” The option is selected by default meaning the popup only shows variables whose type matches the declared type of the view that your are binding the data with. If you deselect the option, all variables are shown but the matching ones are shown in bold, making it easy to spot them.

The screen capture identified by number 1 shows coach view editor for the BindingExample coach view with the Variables page in focus. This coach view has a variable called patient of type PatientInformation. The screen capture identified by number 2 shows the same coach view editor with the Layout page in focus. A text stock coach view instance is selected and its properties are shown below. The variable selection popup that is displayed when you click the Select button for Binding is shown in the screen capture identified by number 3. The popup shows the new option at the bottom and the patient variable only with the properties that are of String type since the binding is being done for a text view.

Smarter support for coach view and data binding (2 of 4)

- New option “Show matching views only” in the coach view selection popup
 - Selected by default when a coach view is bound to data resulting in only the matching coach views being shown
 - When deselected, all coach views are shown with the matching ones in bold

Similar to the variable selection popup, a new option called “Show matching views only” has been added to the popup that is presented when selecting a view definition.

When a coach view is bound to data, this option is selected by default meaning the view selection popup only shows the coach views whose type matches the current binding. If you deselect the option, all coach views are shown, with the matching ones in bold.

The same coach view BindingExample from the previous slide is used here as an example.

The screen capture identified by number 1 shows the variable patient of type PatientInformation that is available in this coach view. The screen capture identified by number 2 shows the coach matching view editor with the layout page in focus. A text stock coach view instance is selected and the properties view below shows that it is bound to the address property of patient variable. The address property is of type String. The coach view selection popup that is displayed when you click the Select button for View is shown in the screen capture identified by number 3 with only the views whose type matches String.

Smarter support for coach view and data binding (3 of 4)

1 Human service editor

2 Coach view editor

3 Human service editor

Coach view when dropped onto a coach layout, it is automatically bound if there is a single matching variable

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Another enhancement in this area is an automatic binding done between coach view and data in various scenarios.

When you add a coach view associated with data onto a coach layout, if the coach has a single matching variable, then the coach view is automatically bound to this variable. The same behavior applies when adding a coach view to another coach view's layout. When determining a match, only the top level variable is considered.

The screen capture identified by number 1 shows a human service editor for AutomaticBindingExample human service with the Variables page in focus. AutomaticBindingExample has a single variable 'patientInfo' of type PatientInformation.

A coach view PatientInfoView has business data of the matching type PatientInformation as shown in the screen capture identified by number 2.

The screen capture identified by number 3 shows the same human service editor with the Coaches page in focus. If you add the PatientInfoView from the palette onto the coach layout, it is automatically bound to the patientInfo variable of the human service as shown in the properties view below.

When determining a match, only the top level variable is considered. What it means in this example is business data of any view being dropped onto the coach layout is compared only with the 'patientInfo' variable's type. If you add the BasicInformationView from the palette onto the coach layout, it is not automatically bound to the basicInfo property of PatientInfo variable even though the business data of BasicInformationView matches the type BasicInformation of basicInfo property.

Smarter support for coach view and data binding (4 of 4)

2 Human service editor

- Complex variable when dropped onto a coach layout, matching coach views are added to the layout

1 Human service editor

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When you add a complex variable from the palette onto a coach layout, if a coach view associated with the same type as that of the dropped variable exists, then this coach view is added to the layout. When more than one matching coach views are found, the first match is added to the layout.

If no matching coach view is found for the top level variable, then matching coach views are searched for properties of the top level variable. In version 8.0, if there is no match at the top level, a placeholder error box is displayed in the coach layout.

The screen capture identified by number 1 shows a human service editor for AutomaticBindingExample human service with the Variables page in focus. AutomaticBindingExample has a variable hospitalRecord of type HospitalRecord.

The screen capture identified by number 2 shows the same human service editor with the Coaches page in focus.

Since there is no coach view bound to the HospitalRecord type, when you add the hospitalRecord variable from the palette onto the coach layout, three different views are added to the coach layout. There is a view each for the RecordID, patientInfo, and diagnosis properties.

Note the color coding used in the screen capture to show related items.

This ability to automatically bind coach view and data in various scenarios reduces the number of steps to develop a coach view from a complex business object with a large number of parameters thus improving productivity.

Configuration options enhancements (1 of 4)

- Rendering of Lists in a table format
- Rendering of complex objects as a group

1 Coach view editor

2 Human service editor

9 Enhancements to coaches © 2013 IBM Corporation

Configuration options of a coach view allow you to configure a particular instance of that coach view. Version 8.0.1 offers nice enhancements when configuring a coach view instance to improve usability.

You can now use lists and complex objects for configuration.

For a configuration option that is defined as List, a table is displayed in the properties view. A configuration option of a complex type is presented as a group in the properties view.

The screen capture identified by number 1 shows a coach view editor for the MyButton coach view with the Variables page in focus. The MyButton coach view has three configuration options. The buttonColor option is a List and buttonDim option is a complex type.

The screen capture identified by number 2 shows a human service editor with the Coaches page in focus. MyButton view instance that is added to the coach is labeled as Patient Lookup. This button instance is selected in the coach and its configuration options are shown in the properties view below. The color option is displayed as a table and the dimension option is displayed as a group. Any values that you specify here are applied to this button instance at runtime.

Configuration options enhancements (2 of 4)

2 Human service editor
1 Coach view editor

The screenshot shows two windows. The top window, 'MyButton', is in the 'Variables' tab, showing 'Variable Declarations' with 'buttonColor (Integer) (List)' and 'buttonDim (ButtonDim)' selected. The 'Data' tab shows 'buttonColor' with 'Group Name' set to 'Visual Attributes'. The bottom window, 'Check In Service', is in the 'Coaches' tab, showing a 'Patient Lookup' button. The 'Properties' view for this button shows 'Configuration' with 'Visual Attributes' expanded, containing a table for 'Color - RGB values' and 'buttonDim' properties.

	Button Color
1	205
2	205
3	255

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- Support for grouping related options
- New property for an option - Group Name
- Group determined by group name specified for an option

When there are many options for a coach view, you can visually group related options making it easy to find these options. A new property Group Name is added for a configuration option in version 8.0.1. Groups are determined purely based on the name that you assign using this property.

Groups are rendered with twisties that allow you to expand and collapse them as needed, making the Configuration section of the properties view less crowded.

The same example from the previous slide is used here to illustrate the grouping feature.

The screen capture identified by number 1 shows the editor for the MyButton coach view with the Variables page in focus. The options buttonColor and buttonDim are assigned a group name of Visual Attributes.

The screen capture identified by number 2 shows a human service editor with the Coaches page in focus. The MyButton view instance that is added to the coach is labeled as Patient Lookup. This button instance is selected in the coach and its configuration options are shown in the properties view below. Unlike the previous slide, the color and the dimension properties are now shown under the group Visual Attributes when it is expanded.

Configuration options enhancements (3 of 4)

- Ability to promote options to the parent coach view

The image consists of three numbered screenshots illustrating the process of promoting configuration options:

- 1 Coach view editor:** Shows the 'Layout' tab of the 'ParentCoachView' editor. A 'Patient Lookup' button is selected. The 'Properties' view shows the 'Color - RGB values' option with an 'Assign a variable' icon (two arrows) next to it.
- 2 Coach view editor:** Shows the 'Variables' tab. A new variable 'buttonColor (Integer) (List)' has been added to the 'Variable Declarations' list. A callout points to this variable with the text: 'Parent coach view with the option that is promoted from the child coach view'.
- 3 Properties view:** Shows the 'Properties' view for the 'Patient Lookup' button. The 'buttonColor' variable is now assigned to the 'Color - RGB values' option. A callout points to this assignment with the text: 'Parent coach view's option variable assigned to the child coach view's option'.

Additional callouts include: 'Click "Assign a variable" icon to enable promoting' and 'Promote the option to the parent coach view'.

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Enhancements to coaches

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Configuration options available on a coach view instance can now be promoted to the parent coach view. So, when this parent coach view is added to another coach view, these options are still available.

You can promote an option to the parent view with just one click. Once the option is added to the parent view, the corresponding variable is assigned to the option of the child coach view instance.

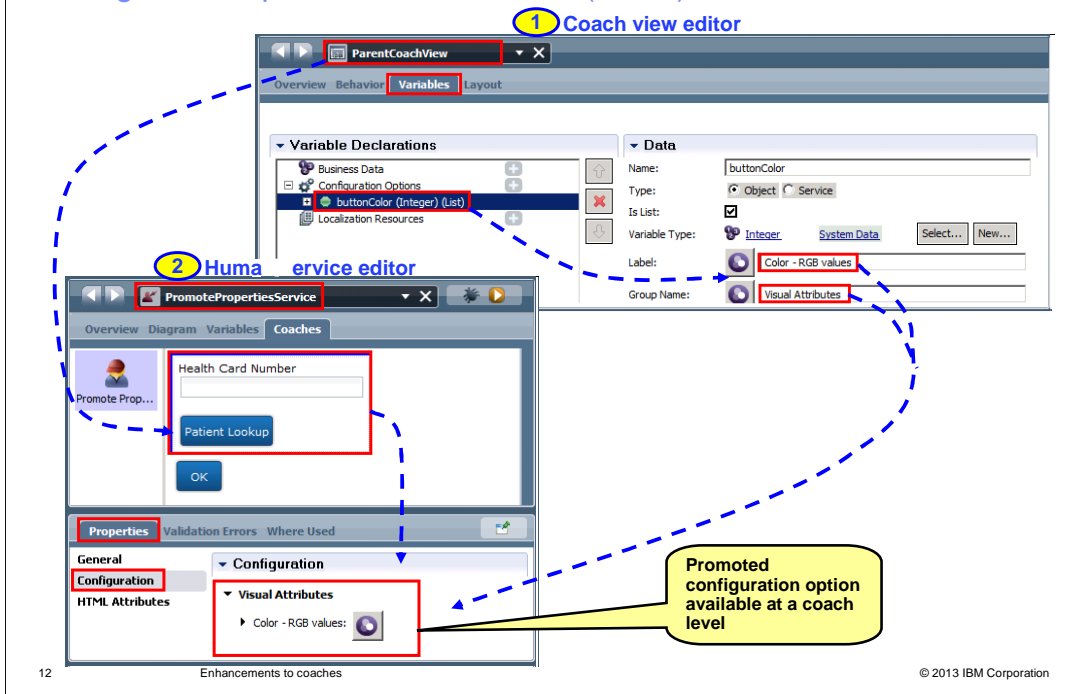
The slide continues to use the MyButton coach view.

The screen capture identified by number 1 shows a coach view editor for ParentCoachView with the Layout page in focus. The MyButton view instance that is added to the coach view is labeled as Patient Lookup. This button instance is selected in the coach and its configuration options are shown in the properties view below. The "Assign a variable" icon beside the color option is clicked to enable promoting of this option. The promote icon represented by two arrows is displayed. Clicking this icon results in the color option being added to the ParentCoachView.

The screen capture identified by number 2 shows ParentCoachView editor with the Variables page in focus. The newly added buttonColor option variable is shown with all its properties, for example, Label, Group Name, and so on.

The screen capture identified by number 3 shows the properties view for Patient Lookup button after promoting of the color option has been done. The new buttonColor option variable in the ParentCoachView is assigned to the Patient Lookup button's color option.

Configuration options enhancements (4 of 4)



Now if you add the ParentCoachView from the previous slide to a coach, the promoted configuration option is available at the coach level.

The screen capture identified by number 1 shows a coach view editor for ParentCoachView with the promoted configuration option buttonColor.

The screen capture identified by number 2 shows a human service editor for PromotePropertiesService with the Coaches page in focus. The coach contains the ParentCoachView instance. The instance is selected in the coach and the configuration section below shows the promoted property buttonColor.

If you add the ParentCoachView to another coach view, you will see the same behavior, that is, the promoted option in ParentCoachView is available at the containing coach view level.

Editing of managed CSS files

- Ability to edit managed CSS files within the tool
- New Edit option in a coach view editor under Behavior->Included Scripts section
- New Editor section in a web file editor

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When creating a coach view it is desirable to edit a CSS file that is included by the coach view directly. A CSS file that is shown under the Included Scripts section on the Behavior page of the coach view is a managed file visible in the scope of the process application that contains the coach view.

Version 8.0.1 allows you to edit such managed CSS files within the tool.

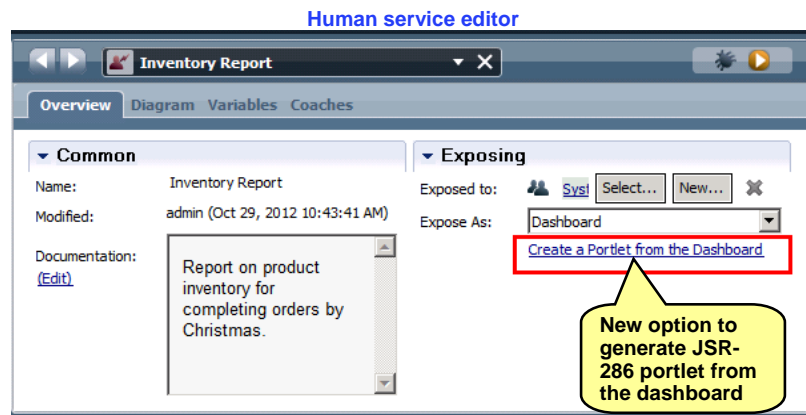
In a coach view editor, when you select a CSS file under the Included Scripts section on the Behavior page, a new Edit option appears as shown in the screen capture identified by number 1. Clicking this Edit option opens the web file editor for the selected CSS file which now has a new section called Editor as shown in the screen capture identified by number 2. You can edit the CSS content in this Editor section.

You can also open the web file editor for a managed CSS file from the Library as shown in the screen capture identified by number 3.

Exposing Coach Dashboards to WebSphere Portal

- Ability to use coach-based dashboards in WebSphere Portal by generating JSR286 portlets from the dashboards
- Support for inbound/outbound event for interacting with other portlets
- Generating portlets for human services exposed as dashboards:

http://pic.dhe.ibm.com/infocenter/dmndhelp/v8r0m1/topic/com.ibm.wbpm.wle.editor.doc/modeling/topic/exporting_dashboards.html



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Enhancements to coaches

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Version 8.0.1 allows you to expose coach dashboards to WebSphere Portal by providing the ability to generate JSR286 portlets from the dashboards.

You can define inbound and outbound events for the dashboard portlet to interact with other portlets on portal pages.

A new option Create a Portlet from the Dashboard is added to the Overview page of a human service editor as shown in the screen capture. This option launches a wizard for you to specify various parameters such as name and description for the portlet, globalization file, and inbound and outbound events. The wizard then generates a WAR file to be deployed on the IBM BPM server.

Note that a human service must have at least one snapshot to be able to create a portlet.

This feature is supported only for the new coaches.

Summary

- Completely redesigned coaches in version 8.0 are further enhanced in version 8.0.1 with
 - The addition of five new stock views
 - Easier palette navigation with simpler categorization
 - Smarter coach view and data binding support
 - More effective presentation of configuration options
 - The ability to edit managed css files within the tool
 - The ability to expose coach dashboards to WebSphere Portal

New coaches introduced in version 8.0 are further enhanced in version 8.0.1 with the addition of new stock coach views, a smarter coach view and data binding support, better visualization of configuration options, direct editing of managed CSS files, and exposing of coach dashboards to WebSphere Portal.

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