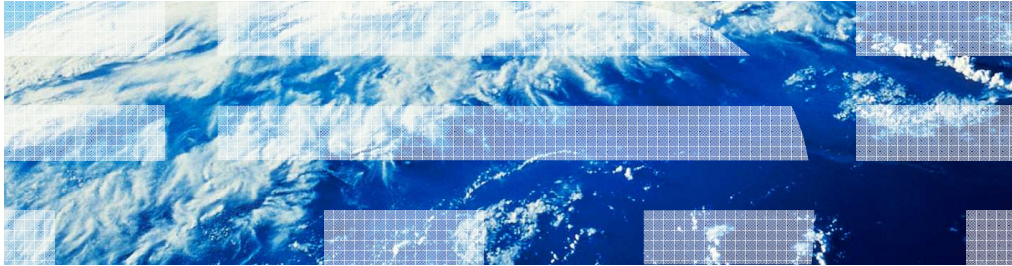




Business Process Management IBM Business Process Manager V8.0

Introduction to Process Designer enhancements



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This presentation provides an overview of the enhancements done in Process Designer in version 8.0.

Agenda

- Auto-flow capability
- Shared Business Objects
- Tagging – simplified usage

You will learn about what the auto-flow capability is and how to configure the auto-flow behavior in a business process definition and sharing of business objects and their values across different tasks and processes. You will also learn about the enhancements to the already existing tagging capability.

Auto-flow capability

- Ability to run sequential tasks assigned to the same user continuously without having to return to the task list after completing each task
- New property on tasks to enable the auto-flow behavior
- Default max wait time between auto-flowed tasks is three seconds
 - Can be configured using 99Local.xml file

File Location:

PROFILE_HOME\config\cells\cell_name\nodes\node_name\servers\server_name\server_type\config\system\99Local.xml

Property:

`<autoflow-timeout>3</autoflow-timeout>`

There is often a logical requirement when working with business process flows that the same user completes sequential tasks continuously without having to go back to the task list after completing each task. This ability to automatically launch the next task helps the users to be more efficient. In versions before 8.0, there is a workaround solution to achieve this behavior. You have to add multiple coaches whether they are related or not in a single human service. This type of process flow does not depict the process logic very well especially when the unrelated coaches are included in one human service.

Version 8.0 provides first class support to achieve this behavior. You can define multiple sequential tasks to be completed continuously when assigned to the same user without compromising on the process flow logic and representation.

A new configuration option is introduced on tasks to enable the auto-flow behavior. The next slide describes the configuration required with an example.

By default, auto-flow will occur between two tasks when the elapsed time between the completion of the 1st task and the start of the next task is up to three seconds. You can change the default value that is defined by a property called “autoflow-timeout” in the 99Local.xml file. The location of the file is specified on the slide.

Configuring Auto-flow behavior

The diagram illustrates a business process flow. Task 1, 'Check In Patient', is performed by Mary. A decision diamond asks 'Out of Province Patient?'. If 'Yes', the flow proceeds to Task 2, 'Get Insurance Details', also performed by Mary. If 'No', the flow proceeds to 'Triage Patient', performed by Tom. The 'Check In Patient' task is configured with 'Automatically flow to next task' checked. The 'Get Insurance Details' task is configured with 'Assign To' set to 'Last User in Lane'.

Properties - Validation Errors - Where Used

Assignments

Assign To: Last User in Lane

Experts Group: <none> Select... New ...

Indicates that this task should be assigned to the user who completed the preceding task

Properties - Validation Errors - Where Used

Implementation

User Task

Check In Service Select... New ...

Processing Behavior

Automatically flow to next task:

Check to indicate that the next task should start immediately after this one completes

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To enable auto-flow behavior between two consecutive tasks, you need to configure both the tasks.

The screen capture at the top left of the slide shows a business process flow that begins with Mary, a receptionist, checking-in the patient. The business process then checks if the patient resides in the same province as the hospital to determine if the hospital charges can be covered by the provincial health insurance or the personal health insurance. If the patient is not from the same province, then Mary collects the personal insurance details also. The patient is then seen by the triage nurse.


Since both the tasks are to be performed by Mary, you can configure auto-flow behavior in this business process.

First, you have to check the “Automatically flow to the next task” option for Check In Patient task as shown in the screen capture at the bottom left. What this option tells is that the next task should be launched right after this task completes if the next task is assigned to the same user.

Secondly, you have to set the Assignments property for Get Insurance Details task in such a way that the value of this property evaluates to the same user who worked on the previous task. The screen capture at the top right shows the value “Last User in Lane” which means the user who worked on the preceding task in this lane.

Now when this process is run, Mary starts working on Check In Patient task. When she completes it, the 2nd task Get Insurance Details launches right away, that is, the coach for Get Insurance Details is displayed right after she finishes the coach for Check In Patient.

Shared Business Object

- Allow sharing of data across different tasks and processes
- New option in Business Object editor to specify that this Business Object is shared
- Business Objects of only complex type can be shared
- Different visualization for a shared business object  in business object editor and Variables tab of different editors
- Shared Business Objects can contain other shared Business Objects
- Shared Business Object's lifetime tied to the originating Process's lifetime

Often in business processes there is a need for different users to work together and know the current state of data before finishing their work as there can be an impact due to the changes in the data.

Version 8.0 introduces a concept of shared business object which allows you to share values of business objects, in short, data between different tasks and processes.

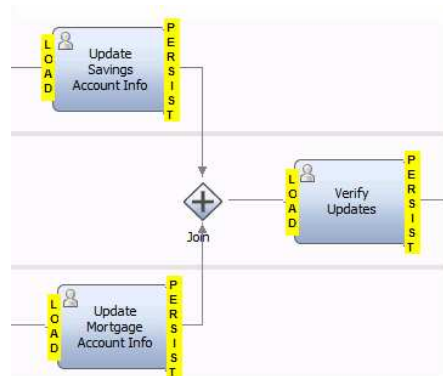
Business objects of only complex type can be shared.

A simple check box option is added to the business object editor to indicate that the business object is a shared business object. Shared business objects are visualized differently in the tool. Shared business objects can contain other shared business objects.

When a Shared Business Object instance is created, the process instance that created it is the parent process. The lifetime of the shared business object is tied to this parent process instance. That means if the parent process instance is deleted, the shared business object instance is also deleted. If you want the shared business object to live for a long time, you can create a long-lived "factory" process to create a shared object instance.

Shared Business Object

- Shared business object loaded and persisted at the start and completion boundaries of a task
- Ability to explicitly load shared Business Object if required using the unique key associated with it



– Loading a shared Business Object

```
tw.local.myVariable =
new tw.object.MySharedBusinessObject(uniqueKey)
```

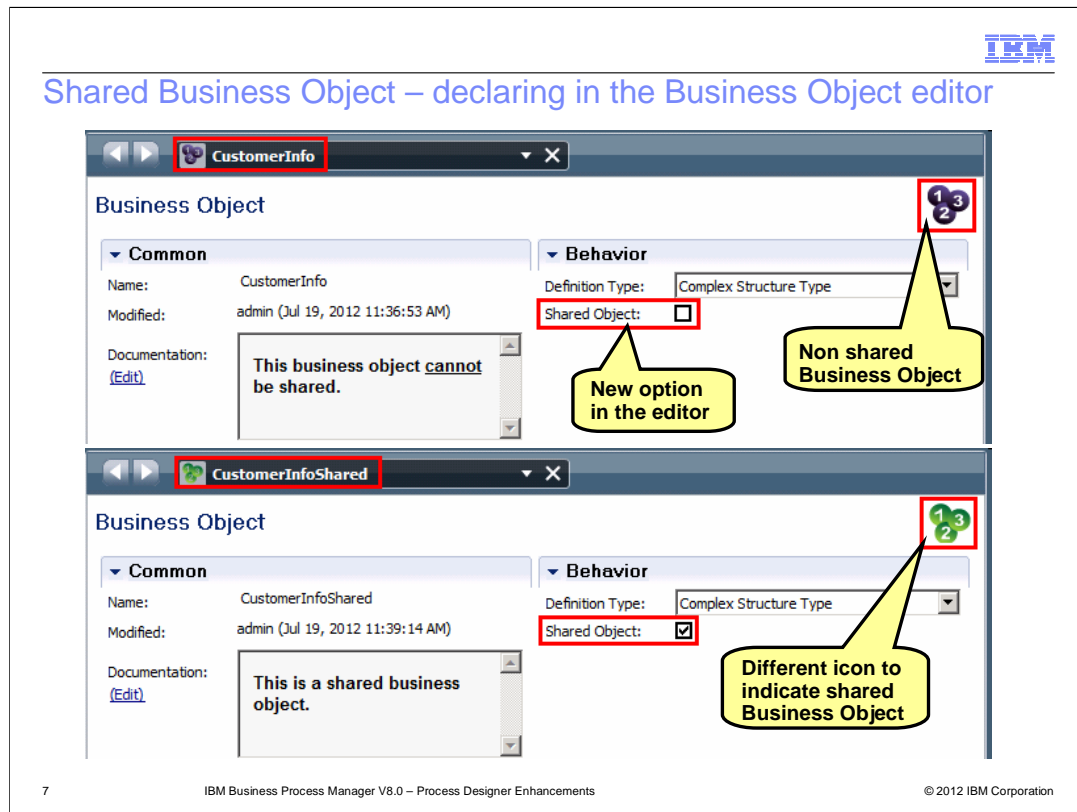
– Getting the unique key:

```
tw.local.variableOfSharedBOType.metadata("key")
```

By default, a shared business object is loaded and persisted when a task receiving an input of the shared business object type is started and completed.

However, if you have long running scripts, you might want to know the latest state of data in-between. To get the latest state of data at any point in time, you can reload the shared business object. An explicit loading of a shared business object can be done using the unique key associated with it. An example of obtaining the unique key and loading a shared business object using this key is shown on the slide.

Shared Business Object – declaring in the Business Object editor

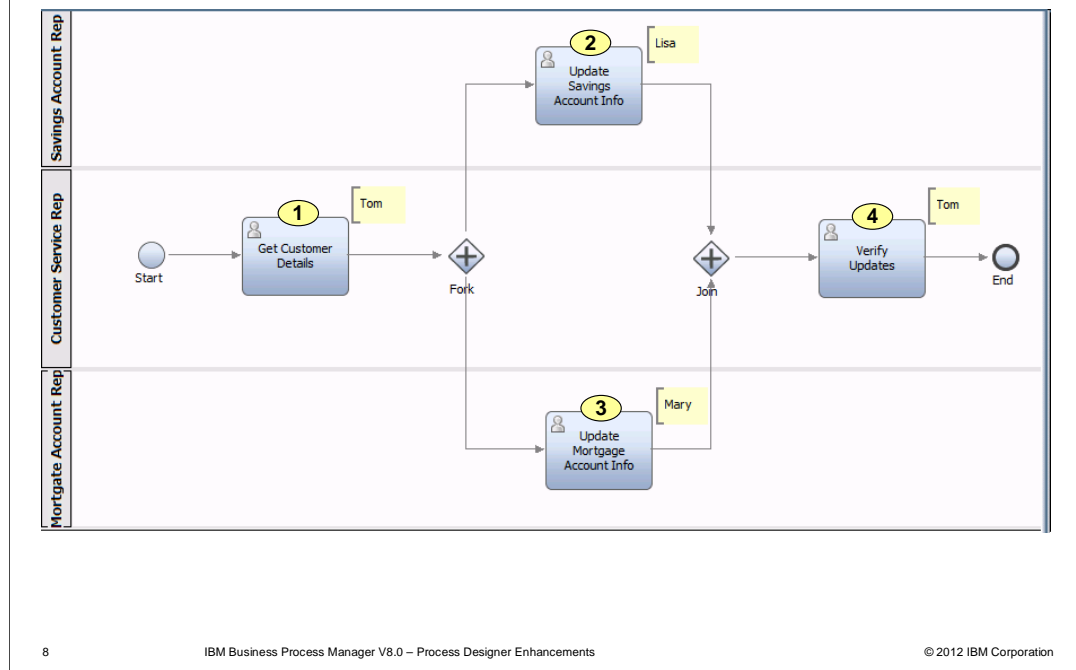


The screen capture on this slide shows two business objects CustomerInfo and CustomerInfoShared.

The new check box option that was mentioned previously is shown in the Behavior section of the business object editor. A shared business object is represented with a green icon versus a blue icon that represents a non shared business object.

The next slide illustrates what happens when these two business objects are used in a business process.

Shared Business Objects – a sample flow



8

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A simple business process flow is shown here. In the first task, a customer service representative, Tom, gets the customer name and email. The process flow then moves to two parallel tasks. A savings account representative, Lisa, updates the savings account information for this customer and a mortgage account representative, Mary, updates the mortgage account information for this customer. When both these tasks are completed, Tom verifies the updates.

Let's first consider the case when the CustomerInfo business object is used to pass data through the process. How is the data handled when this process is run and the tasks are completed in the order 1 (Tom), 2 (Lisa), 3 (Mary) and 4 (Tom)?

When Tom completes the Get Customer Details task by entering the customer name and email, two parallel branches are created at the Fork and a token is sent along each branch. The Update Savings Account Info and the Update Mortgage Account Info tasks are both activated.

Lisa then claims the Update Savings Account Info task. The customer information that was entered by Tom is displayed in the coach. There are additional fields to display the mortgage account information. Since no mortgage information has been entered yet, these fields are blank. Lisa enters the savings account information and completes the task. The flow waits at the Join for Update Mortgage Account Info task to complete.

Mary claims the Update Mortgage Account Info task. The customer information that was entered by Tom is displayed in the coach. There are additional fields to display the savings account information. But the updates done by Lisa are not persisted and hence, these fields have no data. Mary enters the mortgage account information and completes the task.

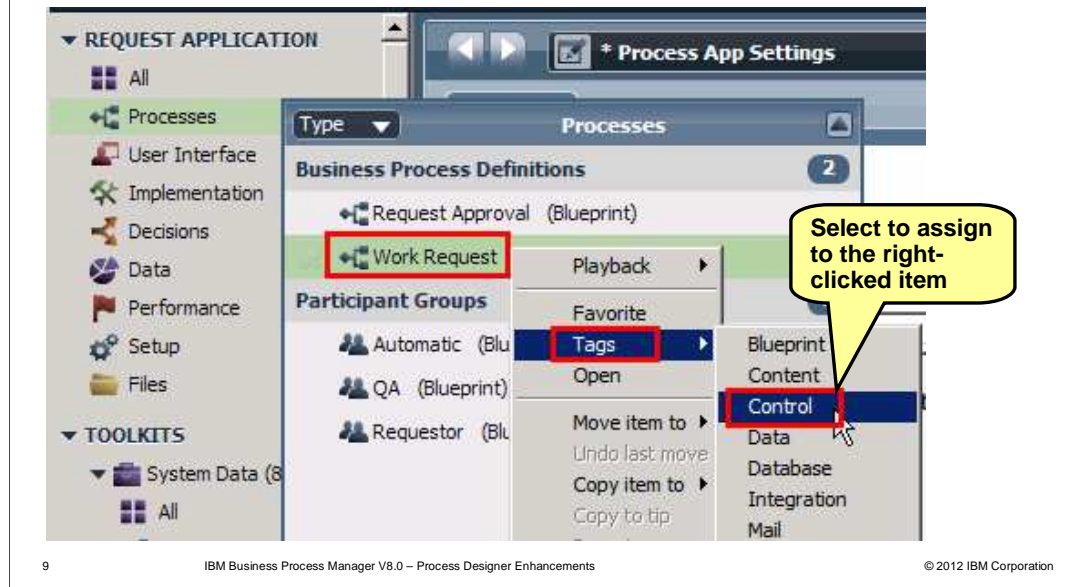
After both parallel tasks are completed, the Verify Updates task is activated. Tom claims the task. The coach shows the information that was entered last, that is, the information entered by Mary.

Let's now consider the case when the CustomerInfoShared business object is used to pass data through the process. When you run the process exactly the same way as before, you will see that when Mary claims the Update Mortgage Account Info task, the savings account information entered by Lisa is displayed in the coach. When Tom claims the Verify Updates task, both the savings account information and the mortgage account information are displayed in the coach. As described on the previous slides, the CustomerInfoShared business object is persisted when the Update Savings Account Info task is completed and reloaded when the Update Mortgage Account Info task is started. The same things happens when Update Mortgage Account Info task is completed and the Verify Updates task is started.

Note that the task order used here is just an example and has no significance on how data sharing works.

Tagging – assigning a tag

- Simplified menu to assign tags



The last topic in this presentation is about tagging.

Process Designer allows you to tag library items. A tag is just a string which you want to identify certain items by. You can think of it as a custom label that can be searched and used to categorize a library item. This is an existing feature.

In version 8.0, the menu to assign a tag to an item is simplified. You have to just right-click an item and select Tags menu option which displays a list of built-in tags plus the tags that a user creates. You can select any tag that you want to assign to the right-clicked item. You can also create and assign a new tag by using the New option in the menu.

You can assign a tag to multi-selected items. Once a tag is assigned to an item, it's displayed beside the item. The next slide shows an example of the same.

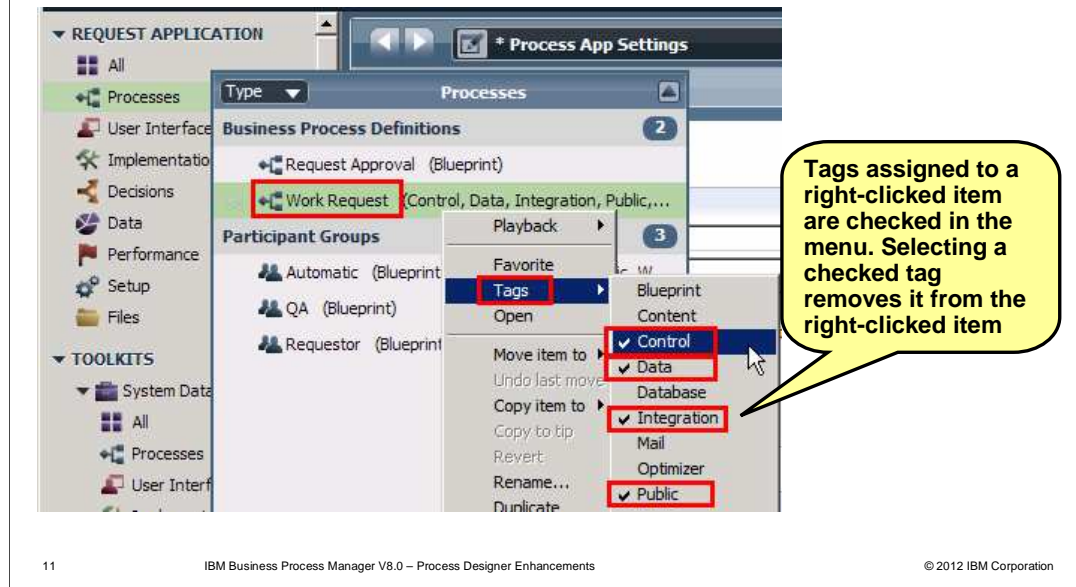
Tagging – displaying of assigned tags

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Tags are displayed in parenthesis besides the items. You can hover over an item to see a complete list of tags as shown on the slide.

Tagging – removing an assigned tag

- Simplified menu to remove tags



Removing an assigned tag is as simple as assigning a tag. When you right-click an item and select the Tags menu to display all the available tags, the tags that are assigned to the right-clicked item are checked. Selecting the checked tag unchecks it meaning the assignment is removed. So, it's basically a toggle.

Tagging – new Public tag and smart folder

- Introduction of a new built-in tag called Public
 - Update to 8.0 System Data toolkit to access the Public Tag
 - Use to identify reusable items
 - Can be used to search an item like any other tag
 - User created Public tag, if any, from pre 8.0 versions, merged into the new Public tag
- Introduction of a new smart folder called Public
 - Corresponds to the new Public tag



Another tagging enhancement is the introduction of a new built-in tag called Public. If you import artifacts from a previous release, you need to update the System Data toolkit to version 8.0 to be able use this tag. You can use this tag to identify reusable items. If you happened to create a tag called Public in the versions before 8.0, it is merged with the Public tag in 8.0 after import.

Corresponding to the Public tag, a new smart folder called Public is added in version 8.0. It will display all the items from the current library and the dependencies that are tagged as Public.

Summary

- You can define multiple sequential tasks to be completed continuously when assigned to the same user. The user does not need to go back to the task list after completing each task.
- Business Objects and their values can now be shared across different tasks and processes. The tasks and processes thus can know the current state of data at any point in time.
- You can assign and remove tags in fewer steps compared to versions before version 8.0.

In this session, you learned about the new auto-flow function that allows completing of sequential tasks assigned to the same user continuously with simple configuration. You also learned about the powerful data sharing capability and usability improvements done in the tagging functionality.



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