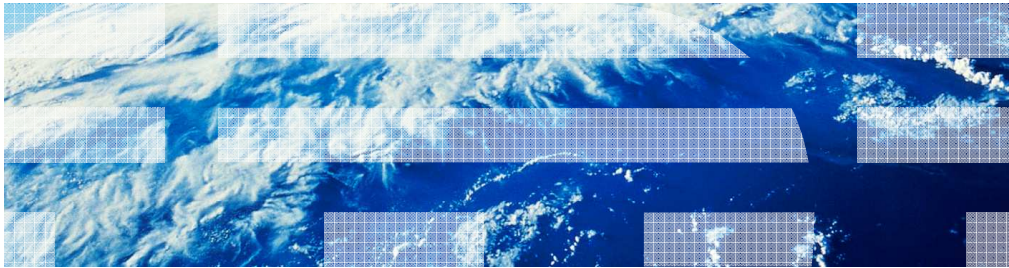


Business Process Management

IBM Business Process Manager V8.0

Process Portal: Ad-hoc tasks



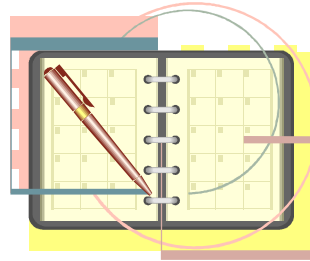
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While a process is running, a user might need to launch a new activity or set of activities, such as updating a customer's contact information or canceling the process instance. The process designer can define a set of these unplanned, or *ad-hoc*, actions to be launched from action menus in the Process Portal, by the person working on the task.

This presentation will show you how to configure and use ad-hoc tasks.

Agenda

- What is an ad-hoc task
- Manage who can start them (swimlane / participant group)
- When they can be invoked (milestone)
- Creating an ad-hoc task
- Running an ad-hoc task
- Security configuration



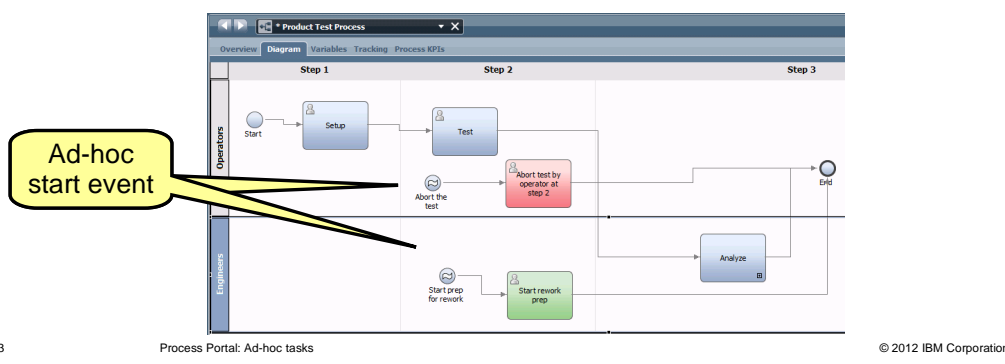
The ability to start ad-hoc tasks is not a new feature, but the ability to specify who and when an ad-hoc task can be started is new for BPM version 8.0.

With BPM V8.0, the process developer can associate the ad-hoc start event with a swimlane, thus specifying who can start it.

They can also specify when an ad-hoc start event becomes visible by specifying the milestone visibility.

What is an ad-hoc task or action?

- Typically a business process defines each step of a business process flow.
- Sometimes the decision to do or not do a task is left up to the individual that is working on the business process
 - Unplanned tasks
 - Optional
 - Alternate entry point into a business process flow
- Examples
 - Updating a customer's contact information
 - Canceling the process instance

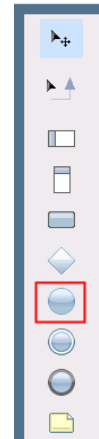
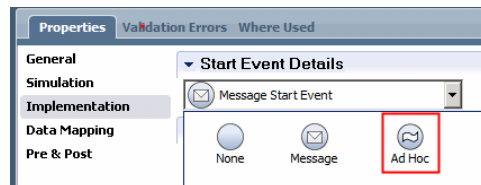


An ad-hoc task, is a task that is not in the typical business process flow. They are unplanned or optional tasks that might need to be done, depending on the situation. The decision to do the task or not, is made by the person interacting with the business process flow. An example of an unplanned or optional task might be adding someone to a contact list. To cancel or abort a business process can sometimes be very subjective. The criteria to be used in not always easy to capture in the flow of the business process. In this case the decision can be left to the operator as an option, using the ad-hoc start event.

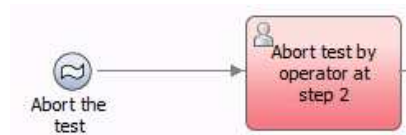
An ad-hoc task can also be thought of as an alternate entry point into the business process flow. In the product testing application used as an example here, the engineer reviewing the data from the test in step 2, knows that the product will need to be reworked in order to meet the quality specifications. In this case the engineer can initiate the preparation for the rework by invoking an ad-hoc task.

Creating an ad-hoc task

- Add a start event to your business process flow
 - Place it in the swimlane and milestone where you want to be invoked from
- Change the implementation to Ad-hoc



- Connect the event to a the task you want to invoke



Creating an ad-hoc task is very easy.

First identify the task you want to start as an ad-hoc task.

Then, in the BPD editor, drag the start event from the palette and place it in front of the task you want to start.

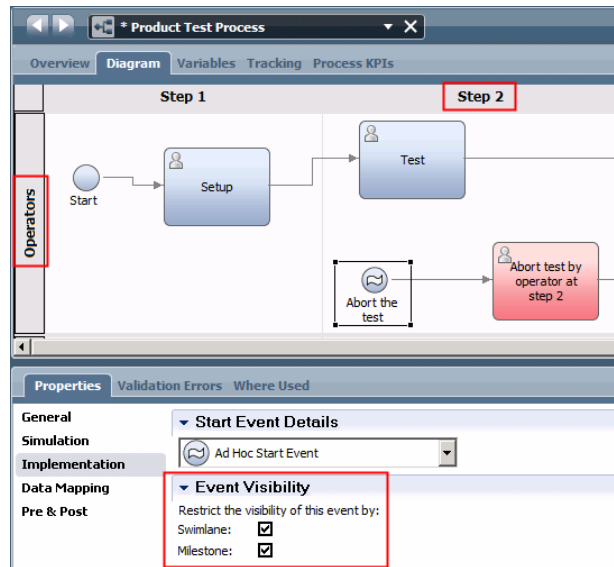
Next, select the start event and in the 'start event details' of the implementation properties, change the type to 'Ad Hoc'.

Finally connect the ad-hoc start event to the task.

Configuring the visibility



- Who can start an ad-hoc task?
 - Specified by the participant group associated with the swimlane
- When, during the course of the business process flow, can the ad-hoc task be started?
 - Specified by the milestone where the ad-hoc start event is placed
- Controlled by the **Event Visibility** options in the implementation properties



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Process Portal: Ad-hoc tasks

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The new feature being introduced with BPM version 8.0 is the ability to specify who can start an ad-hoc task and when it can be started.

Who can initiate an ad-hoc task is determined by two things, the swimlane participants and the event visibility

Notice the event visibility section in the implementation properties.

When the option becomes visible in the process portal, it is determined by the milestone in which it is placed.

Again the visibility option must be enabled before it can actually be used.

In the example shown here, the operator can only abort the test process in the Step 2 milestone.

Running ad-hoc tasks

- Will show up in the context menus for the tasks
- Context dependent
 - May be associated with a milestone

Task View

UI Completion View

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Process Portal: Ad-hoc tasks
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Once everything is properly specified, the ad-hoc tasks are displayed in the pop-up menus of the Process Portal.

The pop-up menu can be accessed from the task view and the UI-completion view.

The menu items are only visible when the specified conditions are met.

In this case a member of the Operators groups is logged in, and the task is at Step 2.

Security configuration

- Define the users and groups in the BPM registry
 - Recommend using a group such as...
 - Ad-hoc_users
- Update the security configuration
 - Add these entry to the **100Custom.xml**

```
<server>
  <portal>
    <default-action-policy>
      <action type="ACTION_INJECT_TOKEN" merge="replace">
        <role>tw_admins</role>
        <role>Ad-hoc_users</role>
      </action>
    </default-action-policy>
  </portal>
</server>
```

The names of the groups and users you defined in the BPM registry

- Restart the server

[Link to information about the 100Custom.xml](#)

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Process Portal: Ad-hoc tasks

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Before you can begin using this new feature the security roles must be configured.

The security roles define what users and groups are allowed to start tasks using the ad-hoc start event.

The configuration is done by adding a stanza to the 100Custom.xml file.

When making these customizations, there are two very important points you need to keep in mind.

First, the server must be restarted after the changes to the 100Custom.xml file have been made.

Second, the roles specified in the stanza must exist before restarting the server.

For these reasons it is suggested that you create a single group for the ad-hoc users in the BPM registry and then manage the access by adding groups and users to that group. In this way you will only need to restart the server once, when you initially add the stanza to the 100Custom.xml file.

To learn more about customizing your BPM environment, visit the link to the Information Center provided on the page.

http://pic.dhe.ibm.com/infocenter/dmndhelp/v8r0mx/topic/com.ibm.wbpm.admin.doc/topics/managing_twks_config_settings.html

Best practice for managing the BPM registry

- To minimize the impact of restarting the server
 - Create a single group/role to use in the 100Custom.xml file.

note: The groups or users that are used in the 100Custom.xml file must be defined before restarting the server with the new 100Custom.xml file.

- Management is done in the Process Admin group administration

User Management > Group Management

Select Group to Modify: %%%

New Group

Remove

New Group	Remove
Ad-hoc_users	
Debug	
EngineersBPM	
OperatorsBPM	
tw_admins	
tw_allusers	

Ad-hoc_users

Team Manager

Group:

No Team Manager Group

Add Members

Remove

Add Members	Remove
EngineersBPM	
OperatorsBPM	

For the configuration changes in the 100Custom.xml file to be used by the server, the server must be restarted.

Restarting a server is time consuming and disruptive, therefore a strategy that minimizes the changes to this file is highly desirable.

One approach for minimizing the updates to the 100Custom.xml file is to create and use a single group called "Ad-hoc_users".

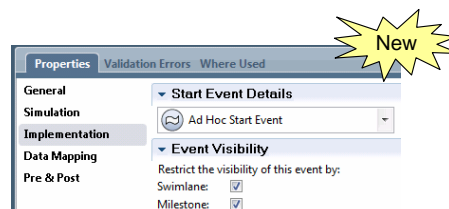
The Ad-hoc_users group is then added as the role in the 100Custom.xml file. Any new users or groups are defined in the BPM registry and then added to the Ad-hoc_users group using the Process Admin console.

With this configuration, all of the management is done using the Process Admin console by adding and removing users from the Ad-hoc_users group.

Here you see that the OperatorsBPM and EngineersBPM groups which are part the example and both are in the Ad-hoc_users group. The OperatorsBPM group is used to define the participants for the Operators swimlane.

Summary

- An ad-hoc task is not part of the normal business process flow
- Can only be started by 'approved' users
- Can be initiated at specific milestones in the business process
- Created using the Process Designer
- Run in the Process Portal
- Security configuration



Ad-hoc tasks are activities that are sometimes done as part of the business process. They are optional and depend on the situation as determined by the person working on the task. With IBM BPM V8.0 it is easy to make these tasks available to the users that need to perform them at the appropriate time.

A new feature has been added to the ad-hoc start event that allows the process developer to restrict the visibility of the menu options in the Process Portal. The menu items for the ad-hoc tasks can be restricted by the swimlane and or the milestone. The swimlane restriction defines who can see the menu items and the milestone is used to define when, in the business process flow they can be displayed.

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