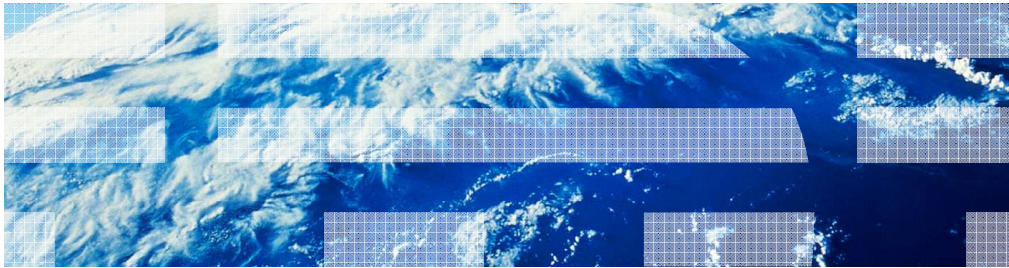


Business Process Management IBM Business Process Manager V8.0

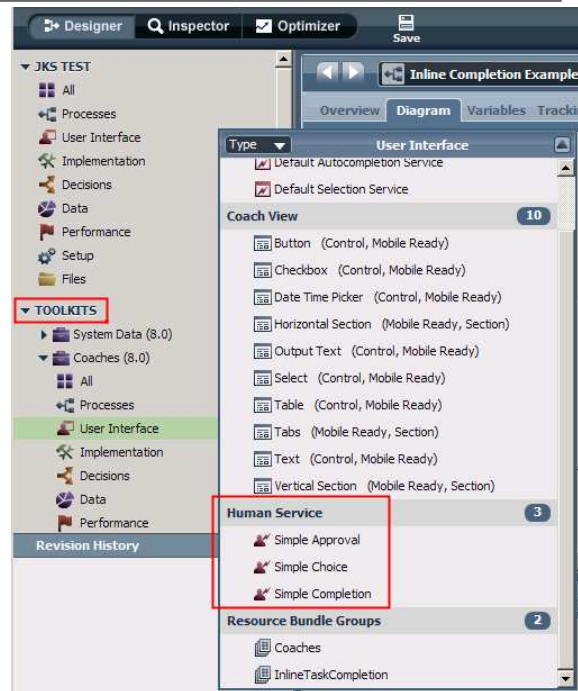
Process Portal: Inline completion



In this presentation you will learn about the new, inline completion feature that is part of the IBM Business Process Manager Process Portal V8.0.

Inline completion

- Some activities in your business process application can be completed with a single action,
 - such as an approval, rejection, or a simple decision.
- Using the *Human Services* provided in the Coaches toolkit
 - you complete the configuration information so that the Process Portal user can perform the action with a single click
 - The action is completed directly from the task list
 - A coach does not need to be opened



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Process Portal: Inline completion

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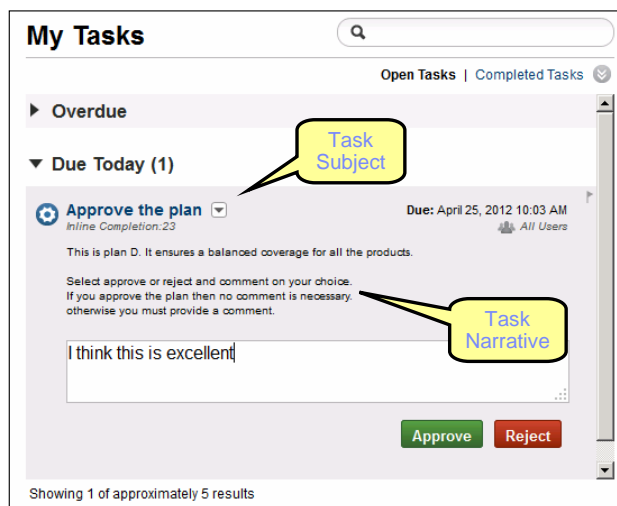
For some steps in a business process an elaborate user interface is not required. There are some cases where the task can be completed with minimal information. Three such categories of tasks have been identified where the information needed to complete the task can be presented directly in the task list. This allows the action to be taken without having to claim the task, complete the dialog, and close it.

The three categories that have been identified are approval, choice, and completion. The implementations for these new features are provided for you as coaches in the Coaches Toolkit. You use them directly in your business process definition. All you need to do is specify the necessary configuration information.

In this presentation you will learn how to use the inline completion human services in your business process definitions.

Simple approval

- Use when the task requires the business user to indicate an approval or rejection based on the *task narrative* and the *task details* that are exposed in the task list.
- Outputs
 - approved Type: Boolean
 - comment Type: String



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Process Portal: Inline completion

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Shown here is an example of a simple approval task as it looks in the task list of the BPM Process Portal.

Expanding the task details, the instructions that have been provided in the task subject and narrative are displayed.

There is an entry field for comments and buttons to Approve or Reject what is being presented. A comment or explanation is required if the action is Reject.

Using the task subject and narrative to provide additional information is described in the Introduction to the Process Portal presentation.

Simple approval: implementation

Information displayed in the task list

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To use the simple approval coach, you first create a user task and select the simple approval coach for the implementation.

Next create the private variables used by the coach, *approvalResult* of type Boolean and *approvalComment* of type String.

If you need a hint about what the coach needs, take a look at the Data Mapping in the Properties.

The information displayed regarding the activity you are being asked to approve is displayed using the task subject and narrative.

The *subject* should be concise and descriptive. It's displayed in the task list. It's seen whether the task details are collapsed or expanded.

In this example, the subject indicates that this is an *approval* task and it describes what is being approved, such as the *Plan*.

The *narrative* section is where you provide any additional details or instructions. The narrative is only visible when the task is expanded as shown in the previous slide.

There is one more level of detail that you can use if you need it. You can expose key business data.

Simple approval with exposed business data

Exposed business data

- Expose the business data
 - Business process overview
 - Selected users or groups
- Enable the attributes to be used in business data searches

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Exposing key business data can be very important in helping the approver make their decision.

To expose the business data, you will need to first specify who can see the exposed business data.

This is done in the overview section of the business process definition. Select users or groups in the business process overview.

Next, you specify which attributes you want to expose. You do this for each individual attribute by selecting the attribute in the *Variables* tab, and enabling the “Available in Search” option as shown in the picture in the lower right. At this time you can also specify an alias which is used to display a more appropriate name to the end-user.

Simple completion

- Use when the task requires the business user to indicate task completion.
 - Pertinent information is displayed in the *task narrative* and the *task details*
- For example,
 - In a simple completion task you might only need to indicate that they have reviewed the task narrative and the exposed task details.
 - A comment is optional.
- Outputs
 - comment Type: String
- Implementation
 - Map the output comment to a process variable

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Process Portal: Inline completion

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The simple completion uses the task subject and narrative to communicate with the user. There is a single, *Complete*, button and an entry field. The entry field is for any comments that need to be added regarding the task being completed.

To capture and use the comment, you must map the comment string to a variable in the data mapping section.

In the example shown, no variable has been mapped at this time.

To use the simple completion coach, you first create a user task and select the simple completion coach for the implementation.

Complete the task subject and narrative, and expose any business object variables that need to be seen by the person completing the activity.

Then map the comment string to a local variable.

Simple choice

- Use when the task requires the business user to choose between a list of options.
- Variables
 - choices
 - choiceSelection
 - choiceComment
- Inputs
 - choices Type: String, List.
By default these choices are tw.resource.SimpleChoice.Approve, tw.resource.SimpleChoice.Reject
- Outputs
 - decision Type: String
 - comment Type: String

My Tasks

Open Tasks | Completed Tasks

▶ Overdue

▼ Due Today (1)

Choose Status Due: April 25, 2012 10:06 AM
Inline Completion: 23

Pick one of the 3 choices based on your knowledge or the plan and the product.

Not ready for prime time

Showing 1 of approximately 5 results

Sometimes you just need to make a simple choice. In the example shown here, the end-user must decide if the quality of the product is good enough to ship, hold it for rework, or scrap it altogether.

This scenario is supported with the “*simple choice*” human service.

There are three variables used by the human service. They are; *choices*, *choiceSelection*, and *choiceComment*.

The *choices* is a list of strings representing the choices.

The *choiceSelection* variable holds the selection made and, the *choiceComment* holds any comments typed in.

Again the task subject, narrative and exposed business objects are used to present the necessary background information to the end-user.

The outputs are the decision and the comment.

Simple choice: implementation

The screenshot displays the IBM Process Designer interface for configuring a 'Simple Choice' service. It is divided into three main sections:


- Top Section:** Shows the 'Variables' tree on the left and the 'Details' panel on the right. The 'choices' variable is selected, showing its name, documentation, and a default value script that initializes an array with 'Ship', 'Scrap', and 'Hold'.
- Middle Section:** Shows the 'Properties' tab for the 'Simple Choice' implementation. The 'Implementation' is set to 'Simple Choice', and the 'Task Header' is 'Choose Status'.
- Bottom Section:** Shows the 'Input Mapping' and 'Output Mapping' sections. The input 'tw.local.choice' is mapped to the 'choices(List of String)' variable, and the outputs 'decision (String)' and 'comment (String)' are mapped to 'tw.local.choiceSel' and 'tw.local.choiceCom' respectively.

Here you see how to configure the simple choice in the Process Designer.


First you select the *Simple Choice* human service for the implementation. This is shown in the middle picture. Remember the 'simple' human services are found in the Coaches toolkit.

Next you switch to the variables tab and creates the variables choice, choiceSelection and choiceComment. They can be any name that you prefer but the types are string or list of strings as shown in the top picture. Set the values for the choices in the choice list. Here the values are static values. You can populate the list dynamically using a Java Script or any of the other tools and techniques available with the Process Designer

Finally, map the variable into and out of the service as shown in the lower picture.



Summary



- **Inline completion**
 - A way to complete basic tasks without opening the task completion user interface
 - Information and user instructions are provided in the
 - Task subject
 - Task narrative
 - Exposed business objects (task details)
- **Simple Completion**
 - Acknowledge completion with optional comment
- **Simple Approval**
 - Accept or reject with comment
- **Simple Choice**
 - Choose from and simple list with optional comment

Completion Verification Due: July 11, 2012 10:47 AM

Inline Completion: 57

Have you completed your testing?

Cost: \$99.98

Add a comment...

Complete

Approve the plan Due: July 11, 2012 10:49 AM

Inline Completion: 58 All Users

This is plan D. It ensures a balanced coverage for all the products.

Select approve or reject and comment on your choice. If you approve the plan then no comment is necessary, otherwise you must provide a comment.

Cost: \$99.98

Add a comment...

Approve **Reject**

Choose Status Due: July 11, 2012 10:50 AM

Inline Completion: 57

Pick one of the 3 choices based on your knowledge or the plan and the product.

Cost: \$99.98

Add a comment...

Ship **Scrap** **Hold**

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Three special cases have been identified where it is more expedient to present the necessary information directly in the task list and perform the action from there, without opening, claiming and submitting the task.

Everything required to complete the task is provided in the task subject, narrative or task details.

The user interface consist of an entry field with one or more buttons.

The three cases are the simple completion, simple approval and simple choice.

The simple completion is a way to acknowledge the completion of a task, using a single button.

The simple approval is a way to accept or reject a proposal, using two buttons.

The simple choice is a way to choose one of several options, using a button for each option.



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