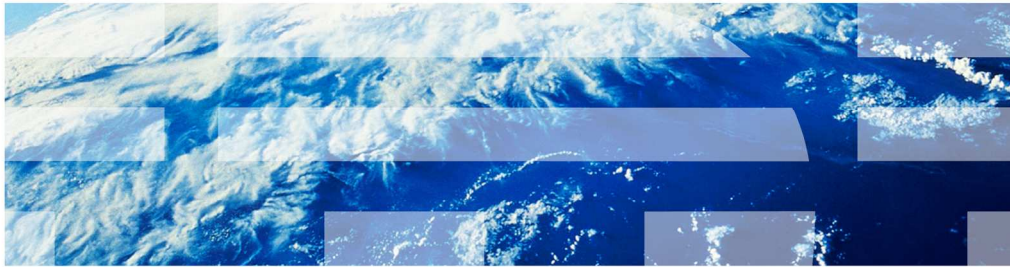

IBM Business Process Manager V8.5

Teams for flexibility in work management



This presentation provides details on Teams for flexibility in work management in IBM BPM V8.5.

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- Introducing teams for flexible staff assignment
 - Team-to-manager relationship
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You are introducing to Teams which superseded and extended Participant Group. There are different teams for flexible staff assignment which included Team-to-Manager Relationship, Team retrieval service, and Team filter service. You are also learning how to administer Teams in the Process administrative console based on Team retrieval services. Finally, you are learning how to manage teams within Team Performance dashboard.

Teams for flexible staff assignment

This section describes different teams for flexible staff assignment.

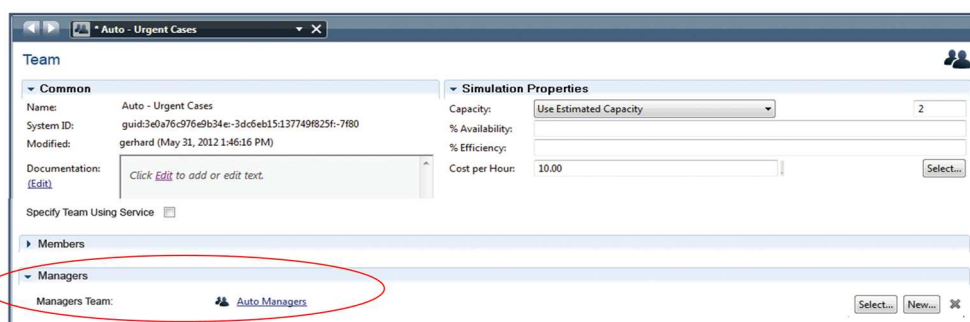
Teams for flexible staff assignment

- Team supersedes Participant Group
 - Manager Team can be defined as part of the model
 - Modeling Teams to be resolved by services allow custom Team resolution implementations
 - Filter services allows for dynamically adapting Team members and Manager Team
- Existing Participant Groups become Teams
 - No migration required

“Teams” are a new concept introduced in IBM BPM V8.5. **Team** supersedes and extends **Participant Group**. Existing Participant Group definitions become Teams. Thus, there is no migration required. When compared to Participant Groups, the Teams approach introduces some changes. First, you can specify a Manager Team that defines the **Managers** of other teams. This can be done recursively. Second, as an alternative to defining Teams statically, it is now possible to specify a **Team Retrieval Service** to retrieve the members and managers of a team. Team Retrieval Services are arbitrary services. They can invoke other services, such as business rules, web services, or JavaScript. As a third alternative, instead of defining a Team statically or using a Team Retrieval Service, you can dynamically determine the name of the Team to which a task is assigned at run time. To do that, use Team when you define the assignment. Then, instead of selecting a Team, specify a variable that will contain the name of the Team at run time. Other ways to define the members of a Team are still supported, but are deprecated.

Team to manager relationship

- Before IBM BPM V8.5, group managers can only be defined through the Process administrative console
- In IBM BPM V8.5, the manager relationship can be modeled in Process Designer when you define the team



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In previous releases, the only way to define a manager-like relationship was manually through the Process administrative console. Security groups can be specified to become manager groups of other security groups. Now, with IBM Business Process Manager version 8.5, the Manager Team can be set in Process Designer when the team is modeled. In version 8.5, participant groups that were defined in a previous version of the product are automatically converted to Teams, with no Manager Team set for them. Simply add Manager Teams to these converted Teams to benefit from the new functionality in a new version of your process application.

Team definition using standard members

The screenshot displays the 'Team' configuration window for a team named 'T1'. The interface is divided into several sections:

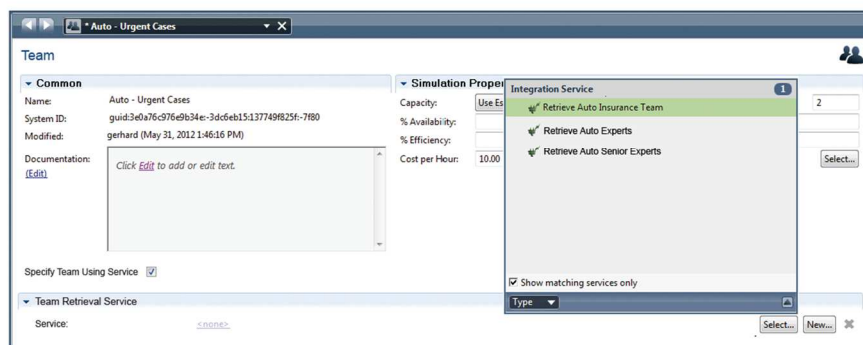
- Common:** Name: T1; Modified: admin (Jan 15, 2013 11:34:25 AM); Documentation: Click [Edit](#) to add or edit text. (Edit); Specify Team Using Service:
- Simulation Properties:** Capacity: Use Estimated Capacity (dropdown) 2; % Availability: (input field); % Efficiency: (input field); Cost per Hour: 10 (input field) [Select...]
- Members:** Select: Standard Members (dropdown); Add user; Add group; Remove
- Managers:** Managers Team: <none> [Select... New... X]

At the bottom of the window, there is a footer with the number '6', the text 'Teams for flexibility in work management', and the copyright notice '© 2013 IBM Corporation'.

A Team can be defined statically, in the same way as defining a Participant Group in previous releases such as adding users and security groups as members of the Team. If you need a more dynamic way of assigning the right members of a team, you can use a Team Retrieval service.

Team resolution using service - Team retrieval service

- Custom service implementations can replace standard staff resolution
- Service template provided in Process Designer ensures compatibility of service implementation and BPM runtime
 - Input to the service: Static values and environment variables
 - The service result is a *Team* business object defining members and a Manager Team




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Team Retrieval Services allow you to customize how IBM Business Process Manager resolves who is supposed to work on a task in a business process. As part of the Team definition in Process Designer, you can select an existing service implementation, or if no suitable service exists, you can create a new one. A service template shipped with the product ensures the compatibility of the service implementation. Static values and environment variables are allowed as input parameters to the service, and the result is a *Team* business object, which holds the team members and, optionally, an associated manager team.

Team retrieval service - Example

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Teams for flexibility in work management

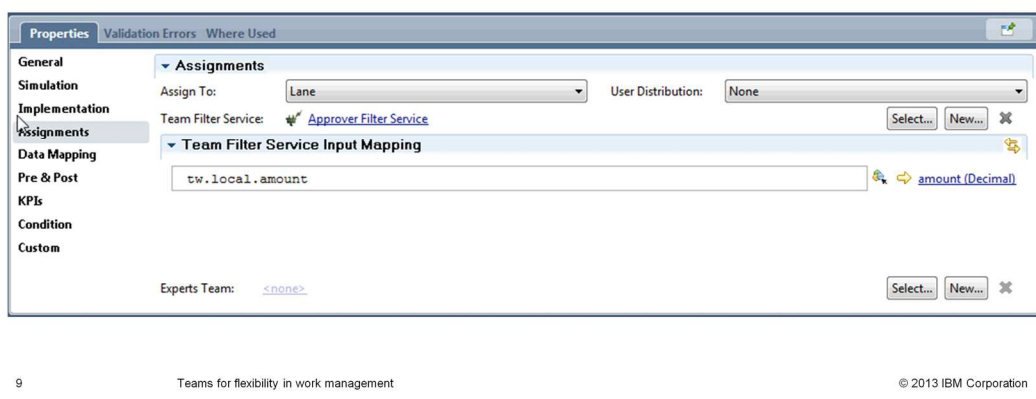
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A Team Retrieval Service is a normal Integration Service, with all its capabilities. The service template ensures that the mandatory input parameter *name*, which holds the team name, and the required output parameter of type *Team*, are part of the service implementation. The example in this slide shows the members property of the Team business object being filled with two user IDs and a group ID.

Whenever a team that is based on Team Retrieval Service is used in a process application, the IBM BPM system invokes the associated service and updates the team membership and the manager team with the service result. If you require an even more dynamic mechanism, and the choice of the right users depends on the right selection of team members, a *Team Filter Service* is the right choice.

Team filter services - Assigning subsets of a team

- To support scenarios where not the whole team can be assigned to a task, filter services can be used to select the correct subset of members
- Based on process or task context, the filter service determines who should work on a task and dynamically creates the list of team members



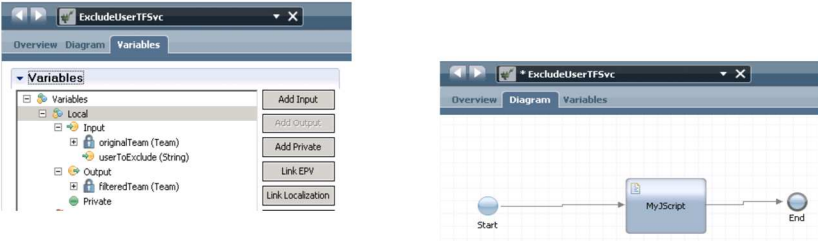
Team Filter Services allow you to select the right members out of an initial Team definition. All variants of teams can be used as input for the Team Filter Service. That is, the base team can be defined on the lane, or it can be modeled using Standard Members, or it can be defined by a Team Retrieval Service. Similar to a Team Retrieval Service, a Team Filter Service is an integration service that returns a Team business object, which specifies who is supposed to work on a given task. The input of such a filter service always contains the modeled base team; in addition, input parameters can be specified that contain local instance variables of a process. These parameters get mapped on the *Assignments* page of a task if a Team Filter Service is specified.

Team filter service - Example (1 of 2)

The screenshot displays the IBM BPM software interface. At the top, the title bar reads '+ pr_using_TeamFilterService'. Below it, the 'Diagram' tab shows a process flow starting with a 'Start' node, followed by a task named 'Task1', then a task named 'TaskWith FilteredTeam', and finally an 'End' node. The 'Properties' window for 'TaskWith FilteredTeam' is open, showing the 'Assignments' section. The 'Assign To' dropdown is set to 'Team'. The 'Team' dropdown is set to 'team_using_SalesTeamTRSvc'. The 'Team Filter Service' dropdown is set to 'ExcludeUserTFSvc'. The 'Team Filter Service Input Mapping' section shows a condition 'tw.local.previousTaskOwner' mapped to 'userToExclude (String)'. The 'Pre & Post' section shows 'Pre Assignments' and 'Post Assignments' with the expression 'tw.local.previousTaskOwner' and 'tw.system.step.task.assignedTo.name' respectively. The bottom of the screenshot shows the page number '10', the text 'Teams for flexibility in work management', and the copyright notice '© 2013 IBM Corporation'.

This example for a team filter service shows how it can be used for implementing a separation of duties scenario. In this case, the two tasks are both assigned to the same team, but whoever worked on the first one should not work on the second. To implement this, the owner of the first task is stored in a local variable, which is then used as input into the filter service implementation.

Team filter service - Example (2 of 2)



```

// get all users of the original team
var origTeam = tw.system.org.findTeamByName(tw.local.originalTeam.name);
var allUsers = origTeam.allUsers;

// compute result team members
var resultTeam = new tw.object.Team();
resultTeam.members = new tw.object.listOf.String();
var userCount = 0;
for(var i=0; i<allUsers.length; i++) {
  var user = allUsers[i].name;
  if (tw.local.userToExclude != user) {
    resultTeam.members[userCount++] = user;
  }
}
// set the result
tw.local.filteredTeam = resultTeam;

```

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Teams for flexibility in work management

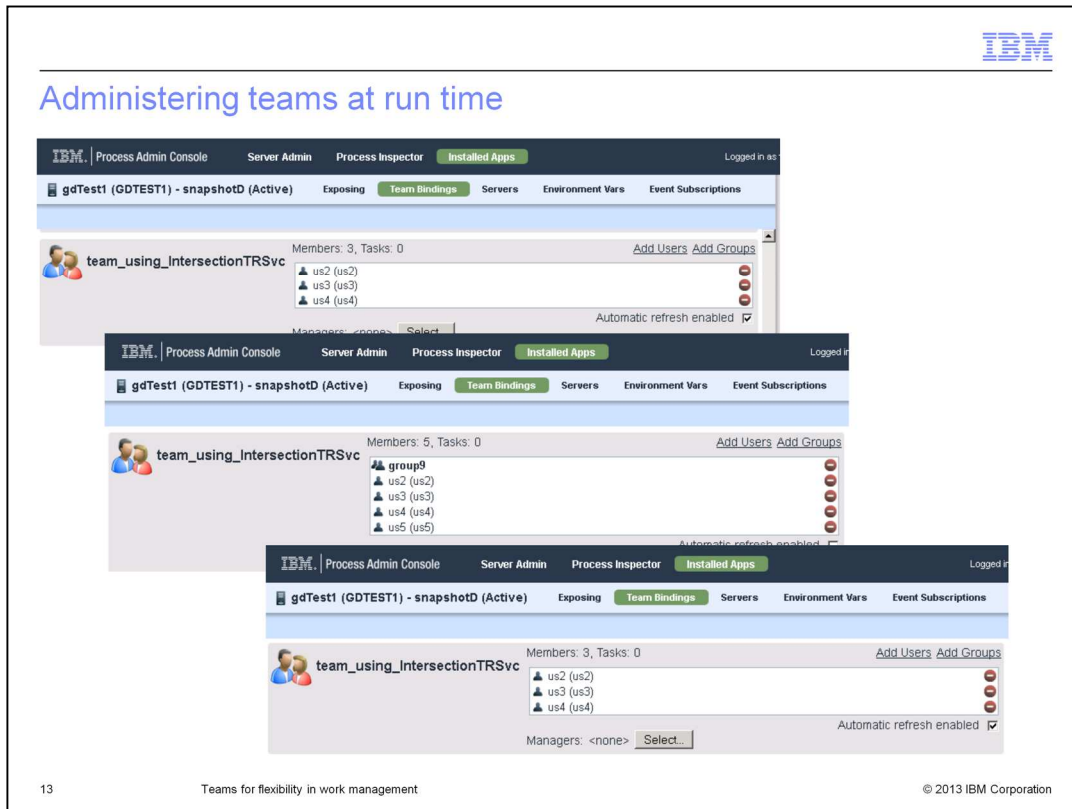
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As shown here, the original team is passed in to the service, along with your ID to exclude. The service implementation then retrieves all members of the original team and sets them all as members of the *filtered Team* as the result of the service. This business object is then used by the IBM BPM system to assign the task.

Having looked at the new ways you can model your teams and business processes to use a more flexible approach to task assignments, you now look at how the new concepts show up at runtime. First we'll look at the administrative aspect of teams and team retrieval services.

Administering teams at runtime

This section describes how to administer teams at runtime.



In order to support the new team-based concepts from an administrator's view, the *Team Bindings* view in the Process administrative console has been enhanced to allow administration of teams based on Team Retrieval Services. As with Participant Groups in earlier releases, administrators can update the group memberships by adding or removing groups and users from a team. In addition, your interface allows update of the manager team as well. For Teams that rely on a Team Retrieval Service, the administrator can, if necessary, disable the service invocation temporarily. For example, if the service implementation does not work as expected, or is not available at all. To avoid manual changes being overwritten accidentally, the *automatic refresh enabled* check box is disabled when the functions to add or delete users or groups are in use. Once the service is available again, the administrator can re-enable the automatic refresh.

Be aware that you cannot administer the result of a Team Filter Service, because such a result is used for individual task instances only. If the assignment of users to tasks needs to be modified, the *Team Performance* dashboard and the Team Manager users come into play.

Section

Managing teams

This section describes how to manage Teams.

Managing teams - Team performance dashboard

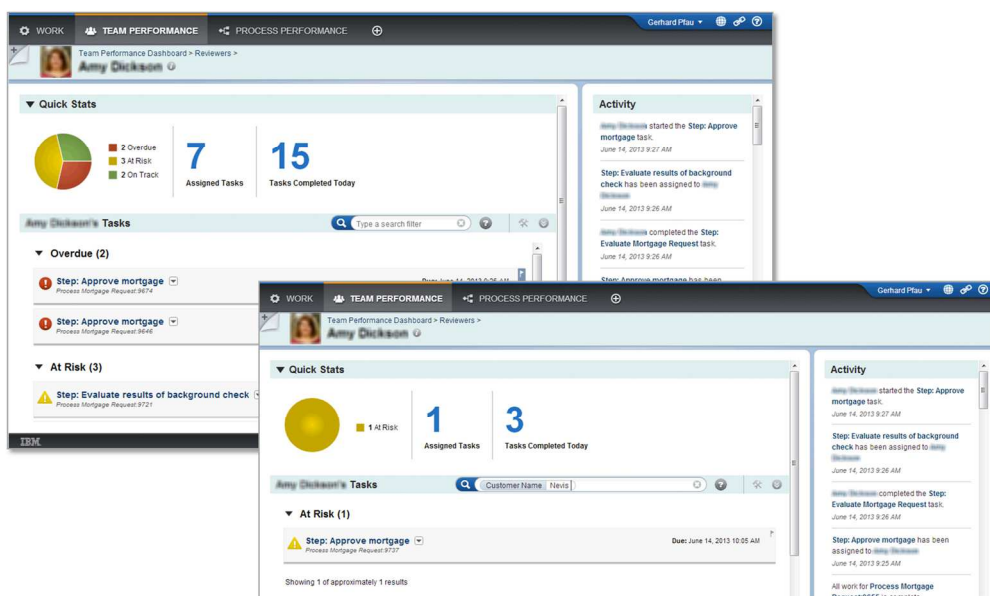
The screenshot displays the IBM Team Performance Dashboard for the 'Reviewers' team. The dashboard is divided into several sections:

- Team Performance Cards:** Four cards provide a high-level overview for different teams:
 - Mortgage Approvers:** 1 Overdue, 25 At Risk, 0 On Track.
 - Senior Mortgage Approvers:** 0 Overdue, 2 At Risk, 0 On Track.
 - Reviewers:** 2 Overdue, 11 At Risk, 5 On Track.
 - Front Office:** 1 Overdue, 5 At Risk, 1 On Track.
- Reviewers Team Overview:**
 - Quick Stats:** 18 Open Tasks, 100 Tasks Completed Today.
 - Turnover Rate:** A bar chart showing the number of tasks completed per day over a week.
 - Roster:** A list of team members with their assigned tasks and completion counts.
 - Open Tasks:** A list of tasks assigned to the team, including 'Evaluate Mortgage Request' and 'Evaluate results of background check'.

At the bottom of the slide, the text reads: "15 Teams for flexibility in work management © 2013 IBM Corporation".

The Team Performance dashboard provides the team manager with an “At a glance” summary across all teams that he or she is managing. When you drill into a team such as the “Reviewers” team in the example on this slide, the dashboard displays all relevant data for that team on the “Overview” tab. The “Quick Stats” display shows how many tasks assigned to the team are “on track”, “at risk”, or already “overdue”. It also shows the overall number of tasks for that team and their average completion time. To the right of the display, the roster shows the people in the team, listed according to the number of team tasks assigned to them. When you click the “Team Tasks” tab, the list of tasks assigned to the team is shown. Here the team manager can assign and re-assign tasks, and change the due date and priority for each task. The chart at the left provides an overview of which tasks are due on which day. Clicking on a day filters the task list for the tasks that are due on that day. The search box above the team roster allows you to filter the task list according to business properties, such as a reference number or a customer name.

Managing teams - team member dashboard



From the Team Performance dashboard, you have access to members of the team. The Team Member page provides the team manager an overview of all tasks that belong to a member of his or her team. The tasks shown for that person are across all teams. This allows a manager to identify conflicts that a team member might have due to tasks assigned from different teams. The “Quick Stats” display shows how many tasks assigned to the person are “on track”, “at risk”, or already “overdue”. It also shows the overall number of tasks assigned to that person and the number of tasks the team member has completed at the current day. To the right of the display, the activities performed by the team member are shown. The search box, located above the task list, allows you to filter the task list according to business properties, such as a reference number or a customer name.

Section

Summary

This section provides a summary on Teams for flexibility in work management.

Summary

- Introduced new “Teams” which is a new concept introduced in IBM BPM V8.5. Team supersedes and extends Participant Group.
- Learned different teams for flexible staff assignment
- Described how to administer teams at Run Time
- Provides detail how to manage teams in Team Performance Dashboard

In summary, you were introduced to Teams which superseded and extended Participant Group. There are different teams for flexible staff assignment which included Team-to-Manager Relationship, Team retrieval service, and Team filter service. You also learned how to administer Teams in the Process administrative console based on Team retrieval services. Finally, you learned how to manage teams within Team Performance dashboard.

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