

Samples and tutorials
Version 7 Release 5

*Hiring Sample Tutorial for IBM Process
Designer*

IBM

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Hiring Sample Tutorial for IBM Process Designer

Overview of the tutorial

This tutorial introduces the features of Process Designer by showing you how to run a sample process. Running the sample process makes it easy to understand how to begin building your own processes.

Objectives

After completing the tutorial, you should be able to:

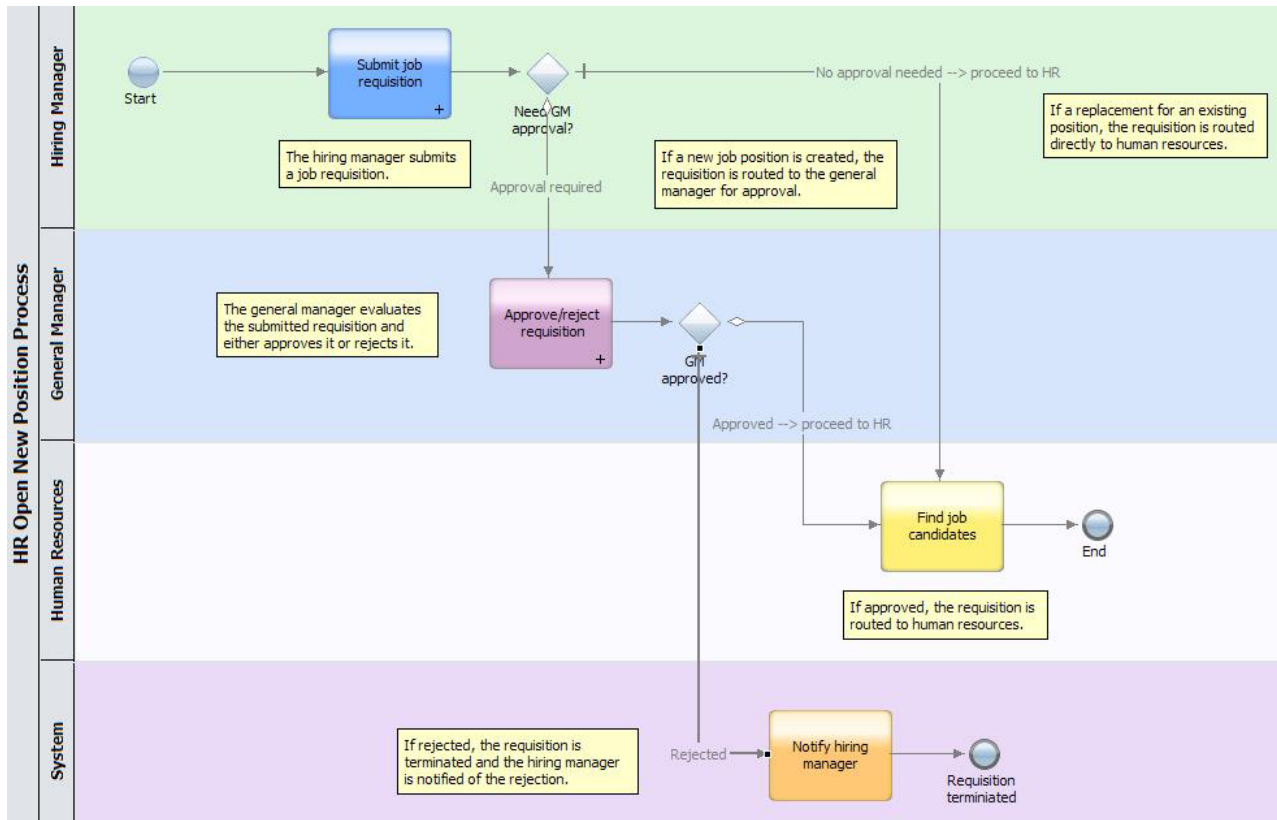
- Open a process in the Designer view in Process Designer.
- Run and review a process using the Inspector view in Process Designer.

| Tasks | Time required |
|--|-----------------------------|
| 1. Ensure access and authorization to the Hiring Sample process application. | • 5 minutes • 15 minutes |
| 2. Step through workflows in the HR Open New Position process using the Inspector. | |

The story: HR Open New Position process

The Hiring Sample process application includes a process called HR Open New Position, which captures the steps and decision points for submitting and processing a request to fill a position. The process diagram in the image below models the following workflows:

- A hiring manager submits a requisition either to fill a new position or to replace a departing employee in an existing position.
- The hiring manager determines the position requirements and prepares a requisition for submission to the Human Resources (HR) department.
- If the request is to fill an existing position, the requisition is routed directly from the hiring manager to HR, which can then search for job candidates.
- If the request is to fill a new position, the requisition is routed to the General Manager (GM) for approval. The GM evaluates the requisition and either approves it or rejects it.
- If the GM approves the requisition, it is routed to HR, which can then search for job candidates. If the GM rejects the requisition, the hiring manager is notified and the requisition is terminated.

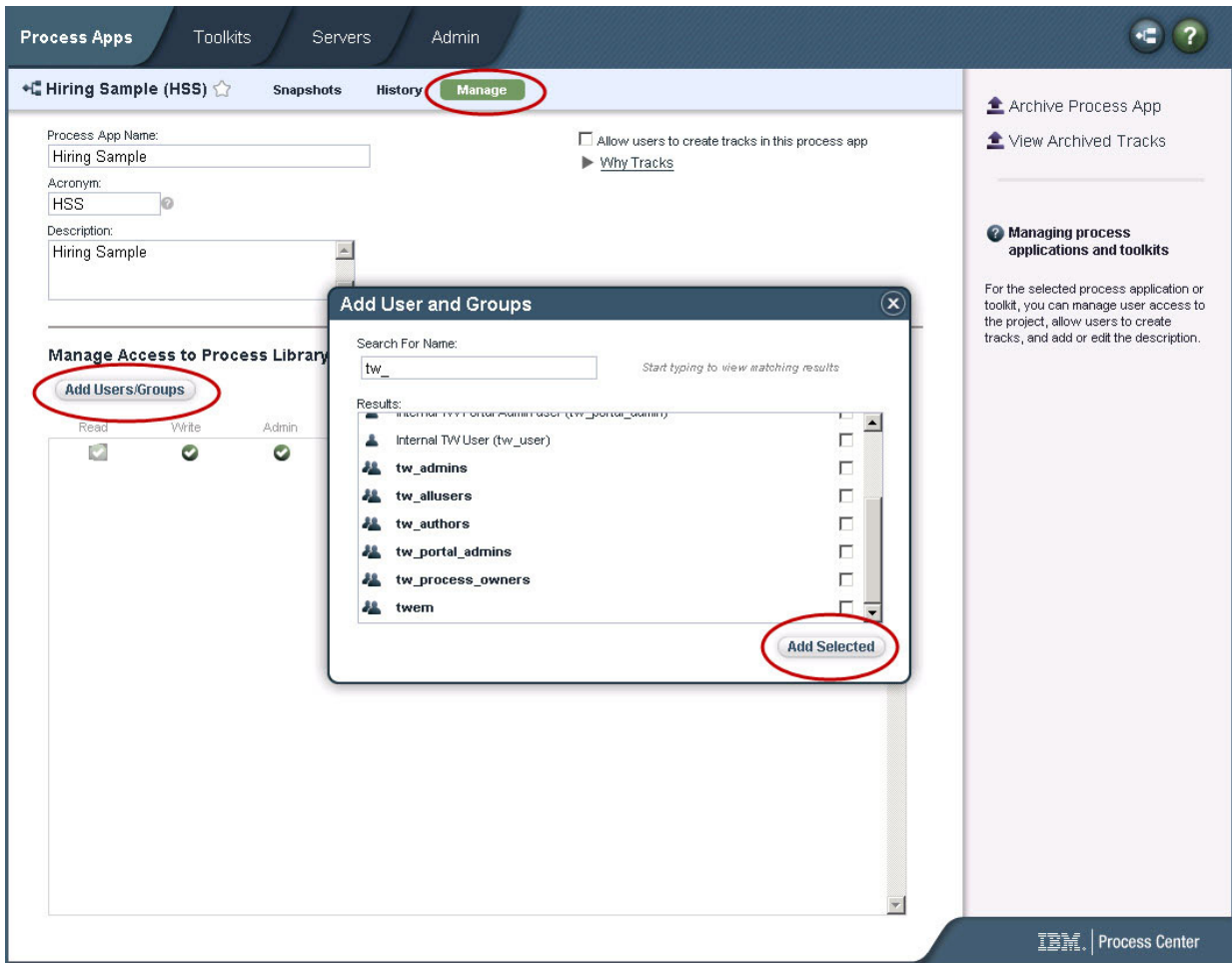


Managing access to the Hiring Sample process application (for administrators)

Give users access to the Hiring Sample process application, which is required for the Hiring Sample Tutorial.

Use the following procedure to grant access to the Hiring Sample process application.

1. In the IBM® Process Center console, click the **Process Apps** tab.
2. Click the **Hiring Sample** process application to display its configuration settings.
3. Click **Manage**.
4. Under **Manage Access to Process Library**, click **Add Users/Groups**.
5. In the **Search for Name** field of the **Add Users and Groups** dialog, enter the name of the user or group that you want to add. You can enter part of the name to display all accounts that match, as shown in the following example.



6. Select the check box next to the users and groups that you want to add. Read access to the tutorial is recommended so that all users in your IBM BPM configuration can access and run the sample process. If users are allowed to edit the process, services, or other implementations, the tutorial may not function properly. If users want to experiment with the implementations included in the tutorial, you can copy the library items to a new process application and grant the appropriate access to those users.
7. Click **Add Selected**.

The selected users and groups can run the Hiring Sample Tutorial.

Verifying access to the Hiring Sample process application

If the Hiring Sample process application is not already available in the IBM Process Center console, you need to import it.

To import, you must have access to the Process Center repository. See [Managing access to the Process Center repository](#) for more information.

The Hiring Sample process application is included in the IBM Business Process Manager installation. It should be visible on the **Process Apps** tab in the Process Center console. If you do not see it, use the following procedure to import it.

1. In the Process Center console, click **Import Process App** in the right pane.
2. In the **Import Process App** dialog, select `[IBM_BPM_home]\imports\standard_hiring_sample.twx`.

3. Click **Import**.

The Hiring Sample process application is listed on the Process Apps tab.

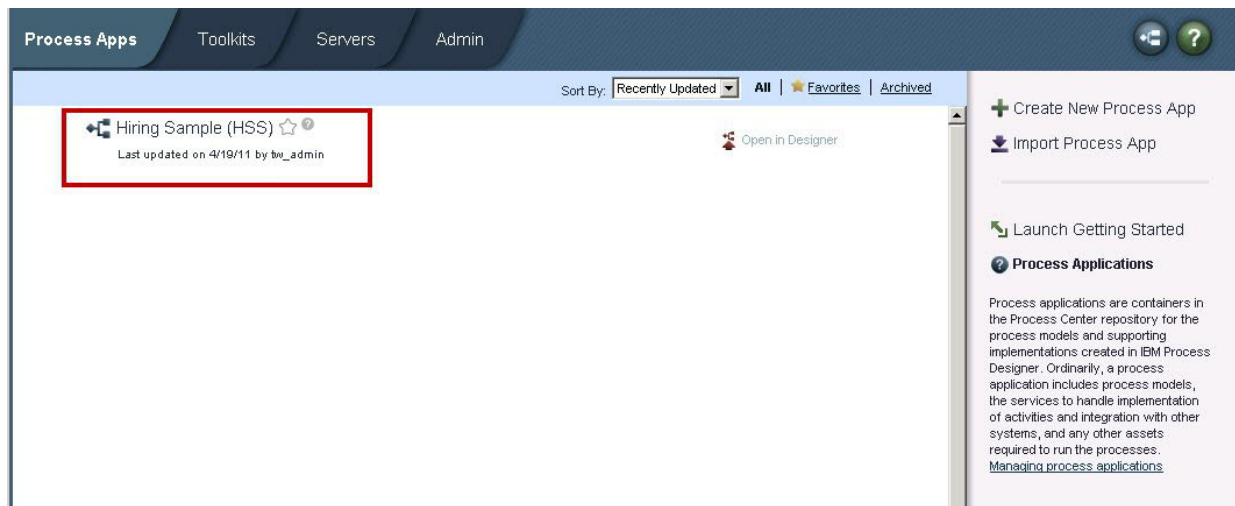
Opening the Hiring Sample process application

Open the Hiring Sample process application to begin running the Hiring Sample Tutorial in IBM Process Designer.

Use the following procedure to open the Hiring Sample process application in the Designer view in Process Designer.

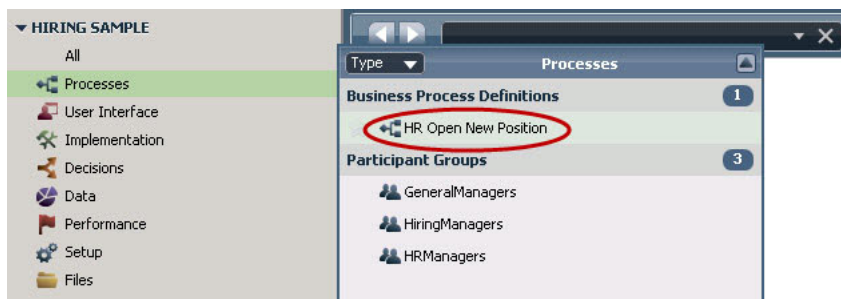
Note: Because the views and functionality available in Process Designer are determined by the settings in **File > Preferences > IBM BPM > Capabilities**, some of the images below might not match your view in the Designer.

1. In the IBM Process Center console, click the **Process Apps** tab.
2. Click **Open in Designer**.



If you open the sample application in Designer and cannot open the business process definition (BPD) and view the process diagram as described in the following steps, you might not have the required access. For more information see, “Managing access to the Hiring Sample process application (for administrators)” on page 2.

3. In the Designer library, click **Processes** to view a list of available process definitions.
4. From the list, double-click the **HR Open New Position** BPD to display the process diagram.



The HR Open New Position BPD opens and you can view the process diagram using the Diagram tab.

Playing back the HR Open Position process

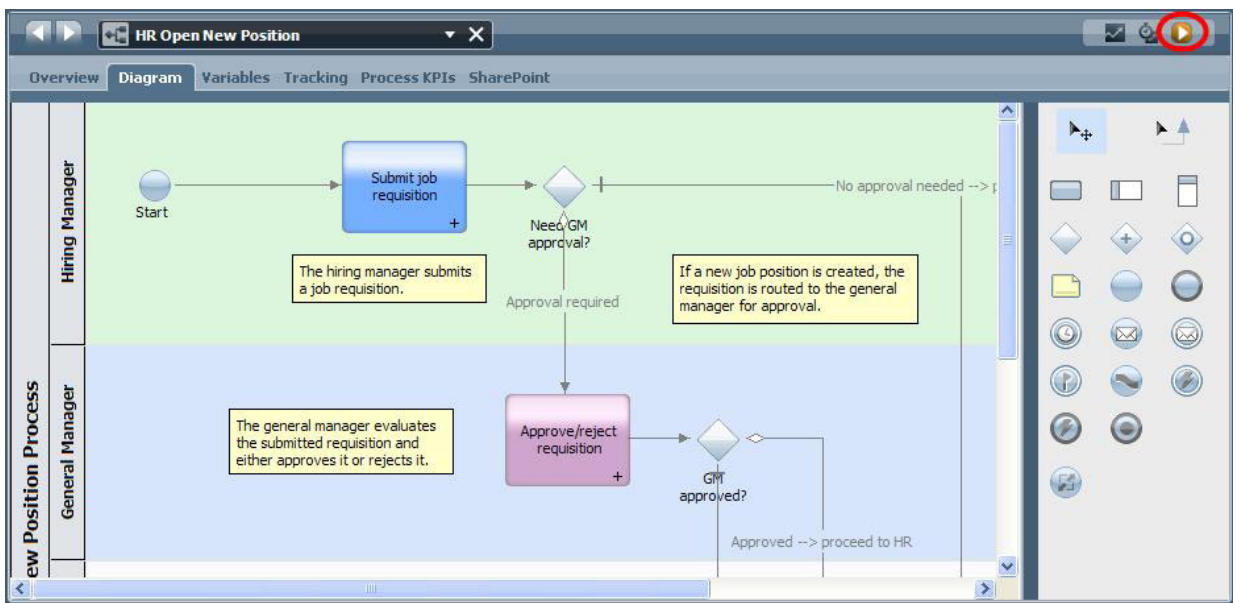
Run the HR Open Position process in the Inspector view in IBM Process Designer to see a process model execute step by step.

The Hiring Sample process application contains a single business process definition - HR Open Position. In this tutorial, you execute (play back) the following workflows in the HR Open New Position process:

- The hiring manager submits a requisition to fill a new position. After submission, the requisition is routed to the GM for approval. If it is approved, the requisition is routed to HR. If it is rejected, the hiring manager is notified and the requisition is terminated.
- The hiring manager submits a requisition to fill an existing position. After submission, the requisition is routed to HR.

Starting the process instance

1. Click the **HR Open New Position process diagram** to ensure that it is selected.
2. Click the **Run Process** icon to launch an instance of the process, as shown in the following image:



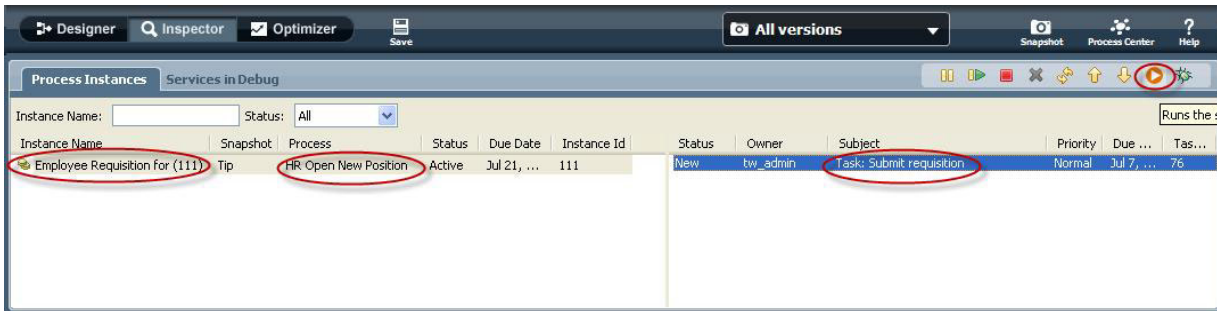
3. When you are prompted to switch to the Inspector, click **Yes**. The process diagram displays in the Inspector.

Filling a new position (approval required)

In the Inspector, the Process Instances view shows all active and completed instances of your process, and the currently running instance of your process definition. You can see that a new, active process instance has started.

To execute the workflow, follow these steps:


1. Click the active instance in the left pane to display the new "Submit requisition" task in the right pane of the Process Instances view.
2. Click the **Run the selected task** icon in the toolbar to start the task.



The "Submit requisition" task generates the Create Job Requisition Coach in a web browser:

3. Acting as the hiring manager, complete the requisition information as shown in the following example.
4. Click **Next**.

5. Acting as the hiring manager, review the information in the Confirm Position Details Coach.
6. Click **Submit**. This completes the hiring manager's task for this process instance.

7. Click the **Refresh**  icon on the toolbar to update the Process Instances view. You can see that the "Submit requisition" task is now closed. Because the hiring manager submitted a request to fill a new position, the General Manager must approve the requisition before it is routed to HR. Thus, the

process instance moves to the next activity, and generates the "Approve or reject requisition" task for the General Manager, as shown in the following image.

- Click the **Run the selected task** icon. In some cases, you might be prompted for a user account or a password to run the task.

| Status | Owner | Subject | Priority | Due Date | Task Id |
|----------|-------------|----------------------------------|----------|--------------------|---------|
| Closed | tw_admin | Task: Submit requisition | Normal | Jul 7, 2009 11:... | 69 |
| Received | (ROLE) G... | Step: Approve/reject requisition | Normal | Jul 7, 2009 11:... | 70 |

The "Approve or reject requisition" task generates a General Manager Approval Coach in a web browser, as shown in the following image.

- Acting as the General Manager, select either **Approved** or **Rejected**. If you select **Rejected**, the coach displays a **Comments** field so that you can provide a reason for the rejection.

General Manager Approval

Job Requisition Information

Requisition number: 001 Date: 10-13-2009

Hiring manager: Scott Department: Finance

Status: Full time Number of employees needed: 1


Location: Boston Job title: Accountant

Position type: New

General manager approval: Approved Rejected

Comments: We do not have money allocated for a new accounting position.

OK Cancel

- Click **OK**.
- Close the web browser.
- Click the **Refresh**  icon to refresh the Process Instances view. You can see that the "Approve or reject requisition" task is now closed, and the instance of the HR Open New Position process that you just ran has now completed.

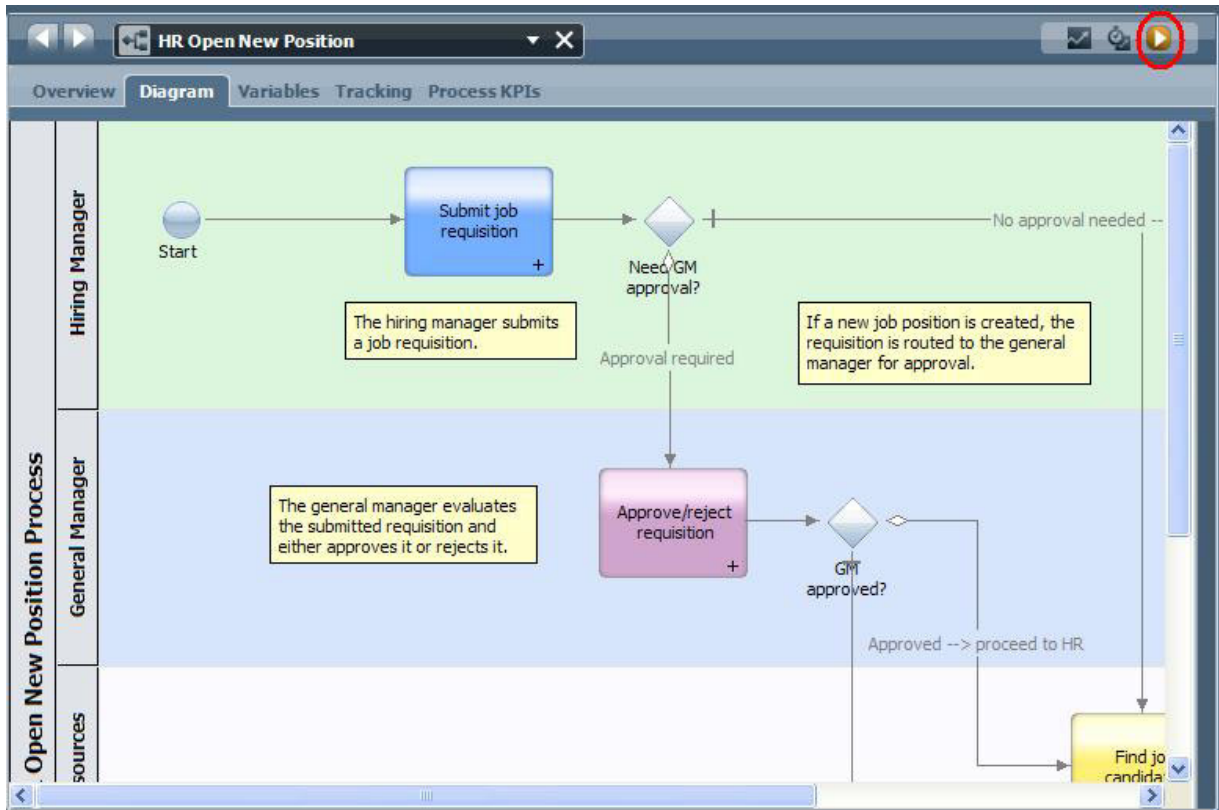
| Instance Name | Snapshot | Process | Status | Due Date | Inst... | Status | Owner | Subject | Priority | Due D... | Task Id |
|-------------------------------------|----------|----------------------|-----------|-------------|---------|--------|----------|----------------------------------|----------|------------|---------|
| Employee Requisition for Scott(107) | Tip | HR Open New Position | Completed | Jul 21, ... | 107 | Closed | tw_admin | Task: Submit requisition | Normal | Jul 7, ... | 71 |
| | | | | | | Closed | tw_admin | Step: Approve/reject requisition | Normal | Jul 7, ... | 72 |

Filling an existing position (no approval required)

Follow these steps to play back the second workflow:

1.

To start a new instance of the HR Open New Position process, click the **Run** icon as shown in the following image. The **Process Instances** view shows a new (active) process instance.



2. Select the active instance in the left pane to display the new "Submit requisition" task in the right pane of the Process Instances view.
3. Start the task in the Inspector by clicking the **Run selected task** icon, as shown in the following image:

The screenshot shows the Process Instances view in a BPMN tool. The table below lists the instances:

| Instance Name | Snapshot | Process | Status | Due Date | Inst... | Status | Owner | Subject | Priority | Due D... | Task Id |
|-------------------------------------|----------|----------------------|-----------|-------------|---------|--------|----------|--------------------------|----------|------------|---------|
| Employee Requisition for Scott(107) | Tip | HR Open New Position | Completed | Jul 21, ... | 107 | New | tw_admin | Task: Submit requisition | Normal | Jul 7, ... | 73 |
| Employee Requisition for (108) | Tip | HR Open New Position | Active | Jul 21, ... | 108 | | | | | | |

The "Submit requisition task" generates a Create Job Requisition Coach in a web browser, as shown in the following image.

Create Job Requisition

Job Requisition Information

Requisition number:

Hiring manager:

Employment status:*

Location:*

Position type:*

Date: 10-13-2009

Department:*

Number of employees needed:

Job title:

- Acting as the hiring manager, complete the requisition information as shown in the following example.

Create Job Requisition

Job Requisition Information

Requisition number: 002

Hiring manager: Scott

Employment status:* Full time

Location:* Boston

Position type:* Existing

Date: 10-13-2009

Department:* Finance

Number of employees needed: 1

Job title: Accountant

- Click **Next**.
- Acting as the hiring manager, complete the Fill Existing Position Coach.

Replace Existing Job Position

Job Requisition Information

Position type: Existing

Job title: Accountant

Replacement for:

Last name: Smith

First name: Bob

Supervisor: Scott

Start date: 10-13-2006

Pay level: 7

Pay type: Exempt

Notes: Bob Smith is leaving the company in two weeks. We need to find a qualified replacement ASAP.

- Click **Next**.
- Acting as the hiring manager, review the information in the Confirm Position Details Coach.
- Click **Submit** . This completes the hiring manager's task for this process instance.

Confirm Job Position

Job Requisition Information

Requisition number: 002

Hiring manager: Scott

Employment status: Full time

Location: Boston

Position type: Existing

Date: 10-13-2009

Department: Finance

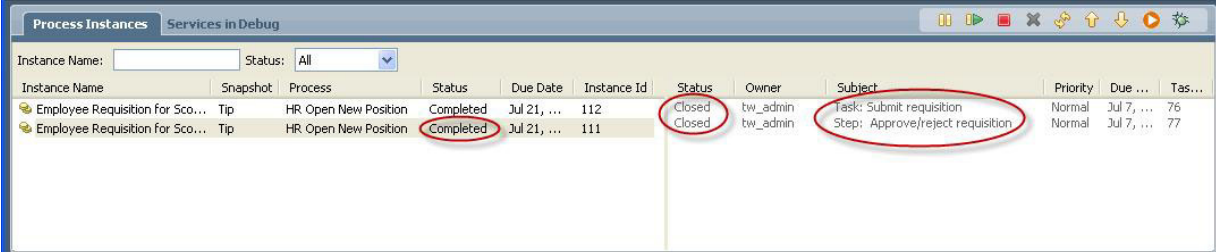
Number of employees needed: 1

Job title: Accountant

10. Close the web browser.

11. Click the **Refresh**  icon to refresh the Process Instances view. You can see that the Submit requisition task is now closed.

Because the hiring manager submitted a requisition to fill an existing position, General Manager approval is not required and the HR Open New Position process instance is completed.



| Instance Name | Snapshot | Process | Status | Due Date | Instance Id | Status | Owner | Subject | Priority | Due ... | Tas... |
|---------------------------------|----------|----------------------|-----------|-------------|-------------|--------|----------|----------------------------------|----------|------------|--------|
| Employee Requisition for Sco... | Tip | HR Open New Position | Completed | Jul 21, ... | 112 | Closed | bw_admin | Task: Submit requisition | Normal | Jul 7, ... | 76 |
| Employee Requisition for Sco... | Tip | HR Open New Position | Completed | Jul 21, ... | 111 | Closed | bw_admin | Step: Approve/reject requisition | Normal | Jul 7, ... | 77 |

You have now finished the Hiring Sample Tutorial. If you like, you can re-run the process in the Inspector and execute the paths not covered in the tutorial.

