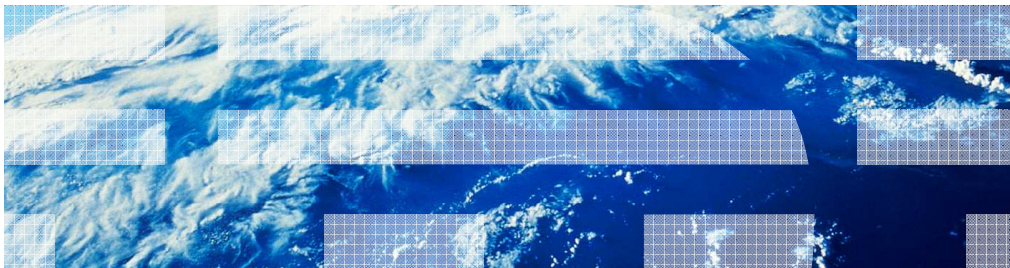

IBM Business Process Manager V7.5.1

Process Designer Enhancements



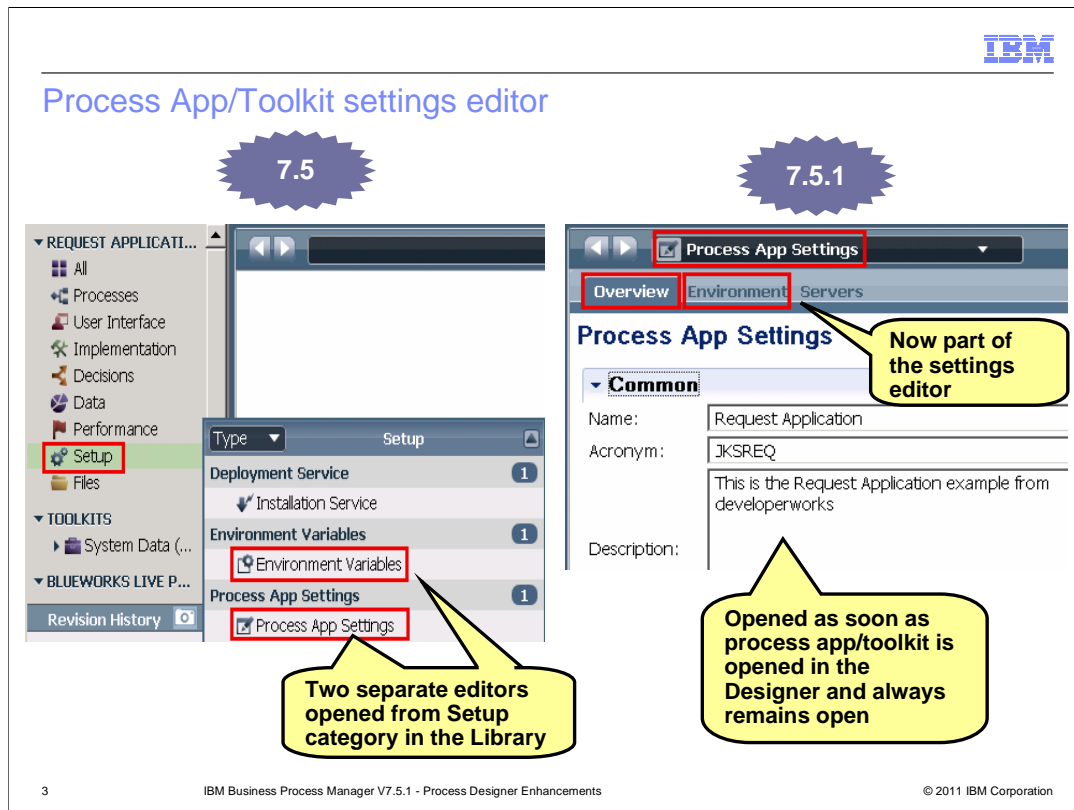
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This session provides introduction to various enhancements done in Process Designer in version 7.5.1.

Agenda

- Process App/Toolkit settings editor
- Simplified Palette in process diagram
- Properties view updates
- Activity Wizard updates
- Direct edit in diagrams
- Enhanced refactoring support
- AIS emulation
- Enhanced Import and Export
- Visualization improvements

You will learn about the new settings editor, palette improvements, properties view updates, enhanced refactoring support, visualization improvements etcetera.



In version 7.5, there are two separate editors for setting environment variables and defining global settings for a process application or a toolkit. Each of these editors is launched from the Setup category in the library as shown in the screen capture on the left.

In version 7.5.1, there is only one editor that is opened when a process application or a toolkit is opened in the Designer. This editor always remains open; you cannot close it. You can navigate between the settings editor and any other editor, for example a BPD editor, a Business Object editor, by using the drop down list in the toolbar at any point in time.

The editor allows you to specify global settings, define environment variables and define server configuration using different tabs. The subsequent slides describe these tabs.

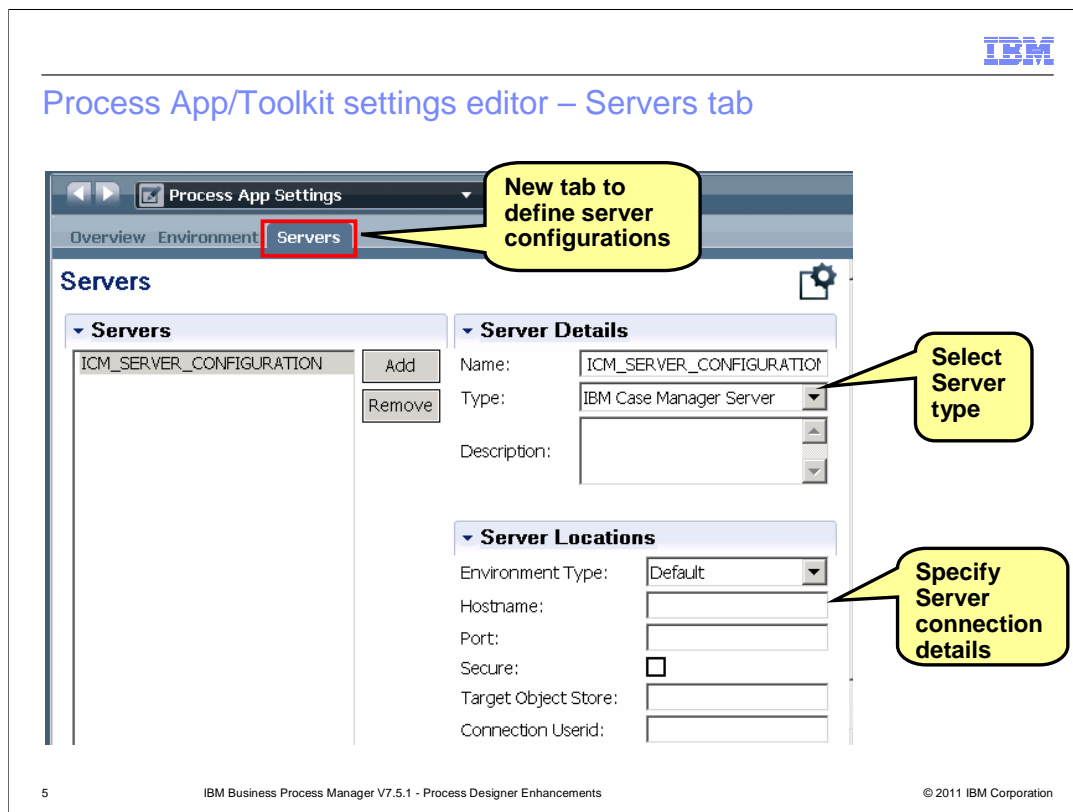
Process App/Toolkit settings editor – Overview Tab

The screenshot displays the 'Process App Settings' editor in the 'Overview' tab. The 'Common' section includes fields for Name (Request Application), Acronym (JKSREQ), and Description (This is the Request Application example from developerworks). The 'Authorization Settings' section shows Portal Admin Group set to <none>. The 'Coach Designer Settings' section shows Coach XSL and Coach CSS both set to <none>. The 'Exposed Items' section lists items exposed from this Process App, including 'Request Approval' under Business Process Diagrams and 'Review Form.HS' under Human Services. A yellow callout box points to these items with the text 'Exposed in the respective editors'.

This slide shows the Overview tab. You can specify global settings in the Overview tab.

The Overview tab provides shortcuts to various exposed items in your process application or a toolkit. This allows quick navigation to these items from the settings editor. You must explicitly expose BPDs and Human services in order to see them in this editor. Web services are always exposed.

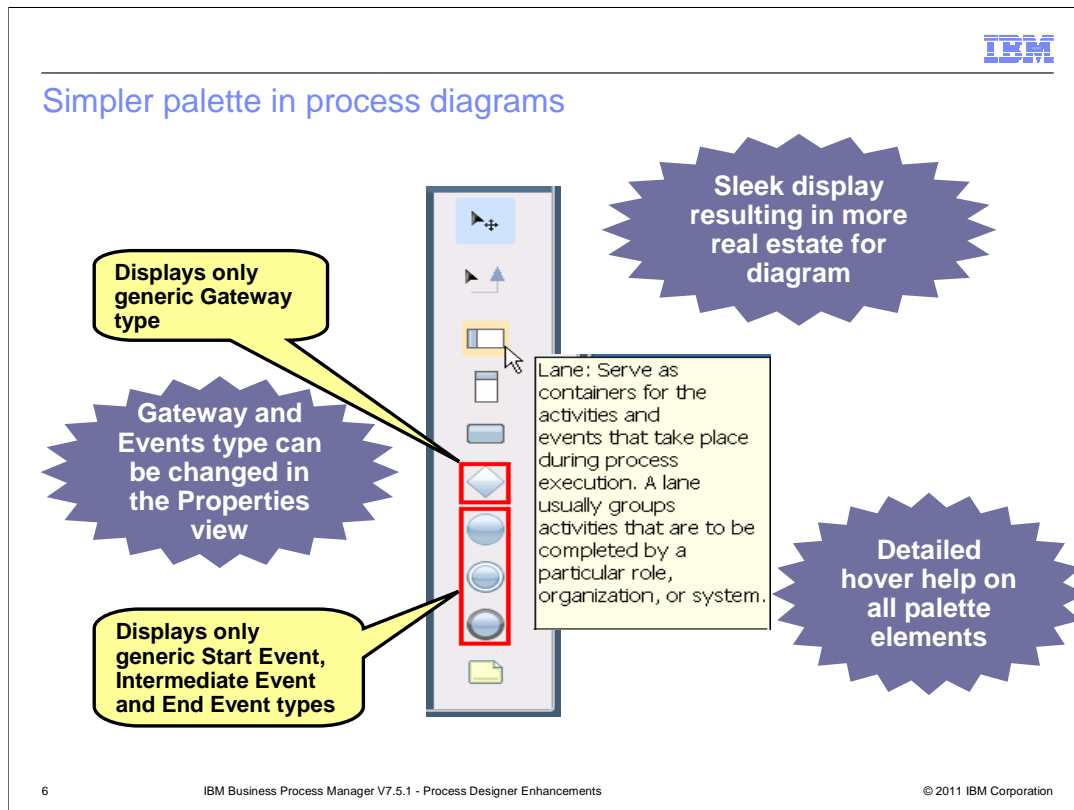
Process App/Toolkit settings editor – Servers tab



The Servers tab allows you to define server configuration for integrating with other products, for example IBM Case Manager. You can choose from three server types using the drop down list. To use an ILOG® Rule Execution Server, select ILOG Rules Server. To access an ECM repository, select IBM Content Integrator Server and to integrate a business process definition with a case management case in IBM Case Manager, select IBM Case Manager Server.

You can provide server connection details using the fields in the Server Locations section.

Simpler palette in process diagrams



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IBM Business Process Manager V7.5.1 - Process Designer Enhancements

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This slide shows how the palette looks in process diagrams in 7.5.1. The palette has fewer items and is rendered vertically giving more real estate for diagrams. It displays only generic types for gateway, start, intermediate and end events. You can change the types of these elements using the Properties view. You can change the Activity type using the Properties view or using the Activity wizard. You will learn about the properties view and activity wizard updates on the next few slides.

Each palette element has detailed hover help that describes the function of the element.

Properties View – Changing element type

The image displays three screenshots of the Properties View in IBM Business Process Manager, illustrating how to change the implementation type of an event.

- Start Event:** The 'Start Event Details' section shows the 'Implementation' tab selected. The 'None Start Event' radio button is selected. Other options include 'Message' and 'Ad Hoc'. A blue starburst labeled 'Start Event' is positioned below the screenshot.
- End Event:** The 'End Event Details' section shows the 'Implementation' tab selected. The 'None End Event' radio button is selected. Other options include 'Message', 'Error', and 'Terminate'. A blue starburst labeled 'End Event' is positioned below the screenshot.
- Intermediate Event:** The 'Intermediate Event Details' section shows the 'Implementation' tab selected. The 'Message Intermediate Event' dropdown is selected. Below it, there are three radio buttons: 'Message', 'Timer', and 'Tracking'. A blue starburst labeled 'Intermediate Event' is positioned below the screenshot. A yellow callout box labeled 'Message Intermediate Event types' points to a sub-view showing two options: 'Receiving' and 'Sending'.

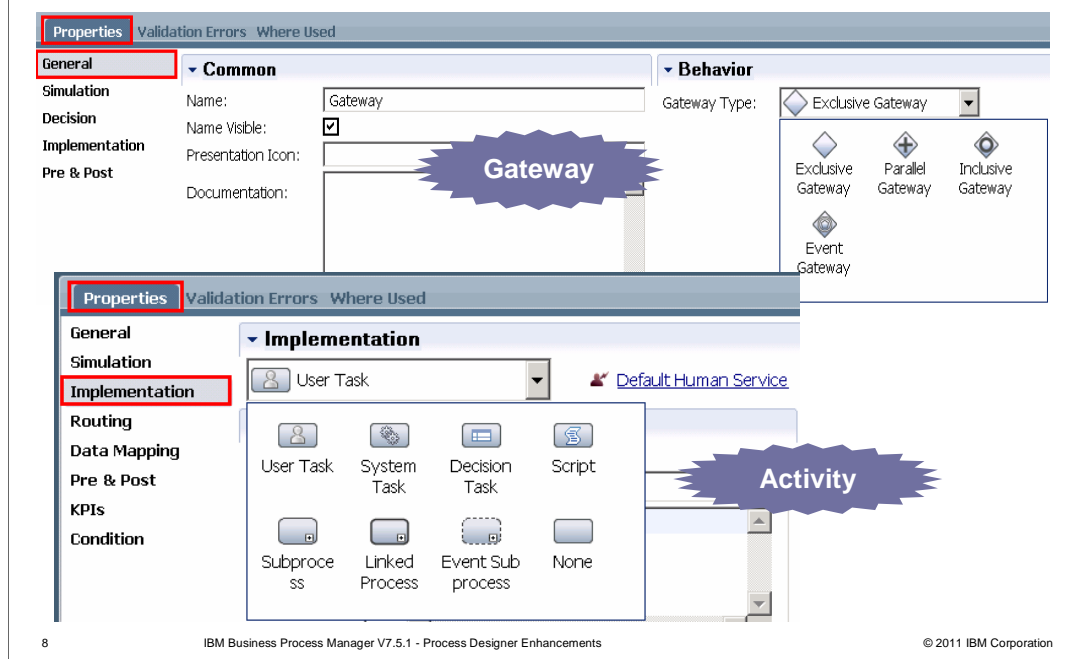
At the bottom of the slide, the text reads: '7 IBM Business Process Manager V7.5.1 - Process Designer Enhancements © 2011 IBM Corporation'.

When you want to add a particular type of event to your process flow, select a generic event type in the palette and add it to a diagram. Then change the event type using the Implementation tab in the Properties view. This slide shows the types available for start, intermediate and end events.

When Message Intermediate Event is selected as a type, a combo box is displayed to specify if it is a receiving event or a sending event. In version 7.5, Message Intermediate Event is always a Receiving event. The Sending event is introduced in version 7.5.1. You can use the Sending event in your process flow when you want to send a message to say another process during the execution of the activities in a process.

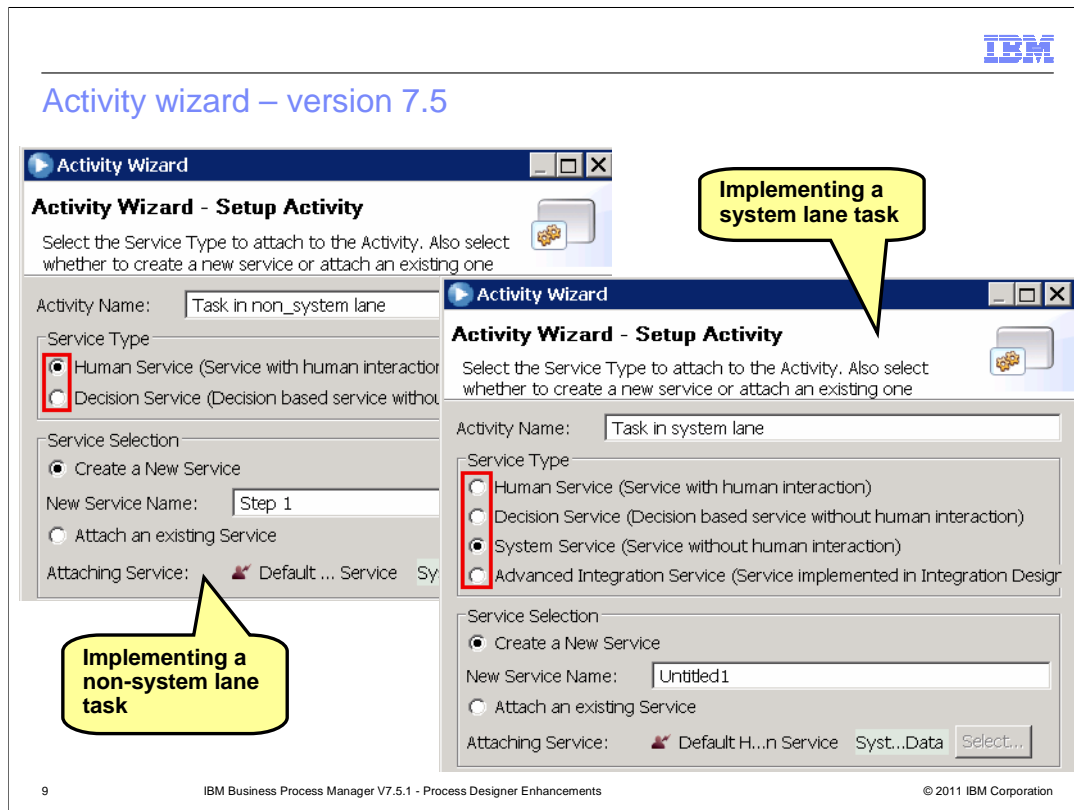
Note that most of these event types are available in version 7.5 as well. The difference is that all these types are available in the palette as separate elements in version 7.5. In version 7.5.1, they are available only in the properties view.

Properties View – Changing element type



When you want to add a particular type of gateway to your process flow, select a generic gateway type in the palette and add it to a diagram. Then change the gateway type using the Properties view->General tab as shown in the image at the top.

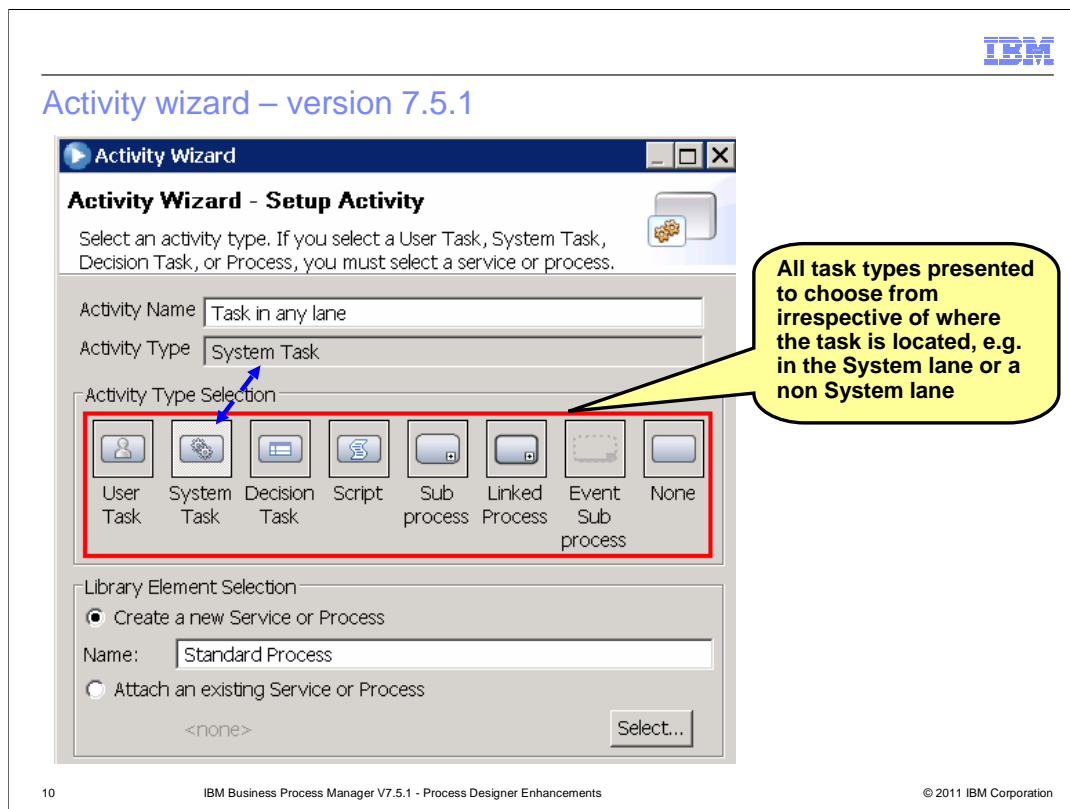
The same behavior applies to an activity. Once you add an activity to a diagram, you can change the activity type using the Properties view->Implementation tab as shown in the image at the bottom. You can also use the activity wizard to change the activity type. You will learn about the updates done in the activity wizard for changing activity type on the next few slides.



There is a clear distinction when implementing a system lane task versus a non system lane task in version 7.5. The Activity wizard provides service types to choose from based on where the task is placed; in a system lane or a non system lane.

This approach is changed in version 7.5.1.

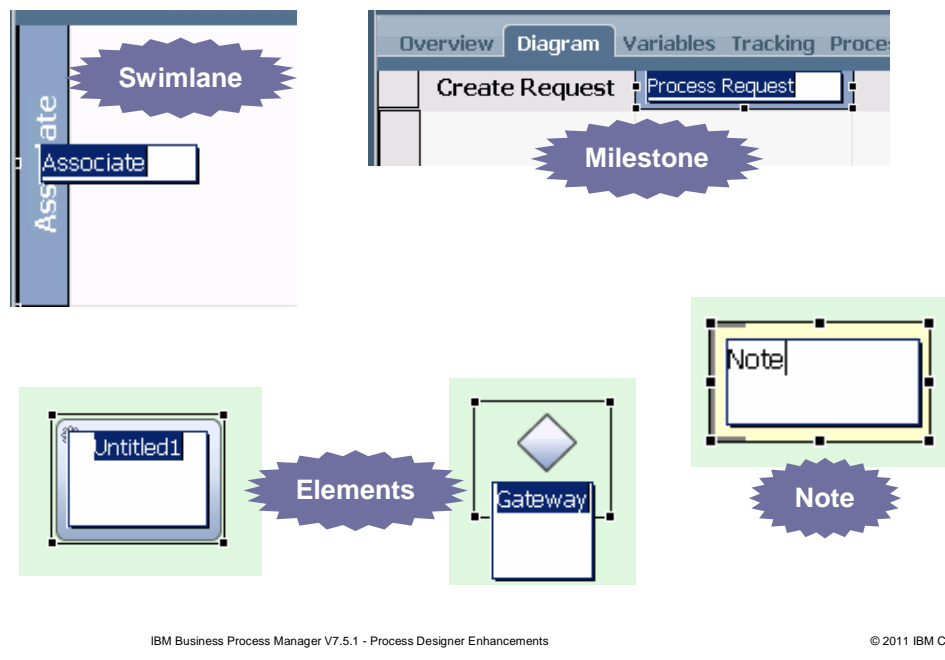
Activity wizard – version 7.5.1



The activity wizard now shows all task types to choose from irrespective of where the task is located. The wizard allows you to create a generic integration service if you select System Task as the task type. If you want to implement the task as a specialized integration service, for example Advanced Integration Service, click the Select... button in the Library Element Selection section of the dialog. In the list of services that shows up, choose an already created Advanced Integration Service.

You can create an Advanced Integration Service by clicking the “+” symbol besides the Implementation category in the library and selecting Advanced Integration Service option from the list of components.

Direct edit capability



You can now change the names of diagram elements using direct edit capability. Direct edit is enabled in all graphical editors. Swimlane and Milestone names also can be changed using the direct edit capability. When you add an element from the palette to a diagram, direct edit is enabled right away to allow you to specify the element name. To change the name at a later time, select the element and click the name.

The properties view->General tab can also be used for changing the names as in version 7.5.

Enhanced refactoring support

- Ability to drag items from process application to a dependant toolkit to initiate move
 - Behavior is the same as using Move item to... pop-up menu
- Ability to move library items with dependencies interactively using the new “Moving items to ...” dialog
 - Launched when
 - Move is invoked by drag
 - Move is invoked from the pop-up menu
 - Lists and selects items being moved and all their dependencies by default
 - Dependencies include
 - Items that are referenced by the item being moved
 - Items that share the same XSD or WSDL file as the item being moved
 - Lists all items that depend upon the items being moved in a separate section
 - Can explicitly add these items to the items being moved list
 - Once added to the items being moved list, the dependencies list is updated

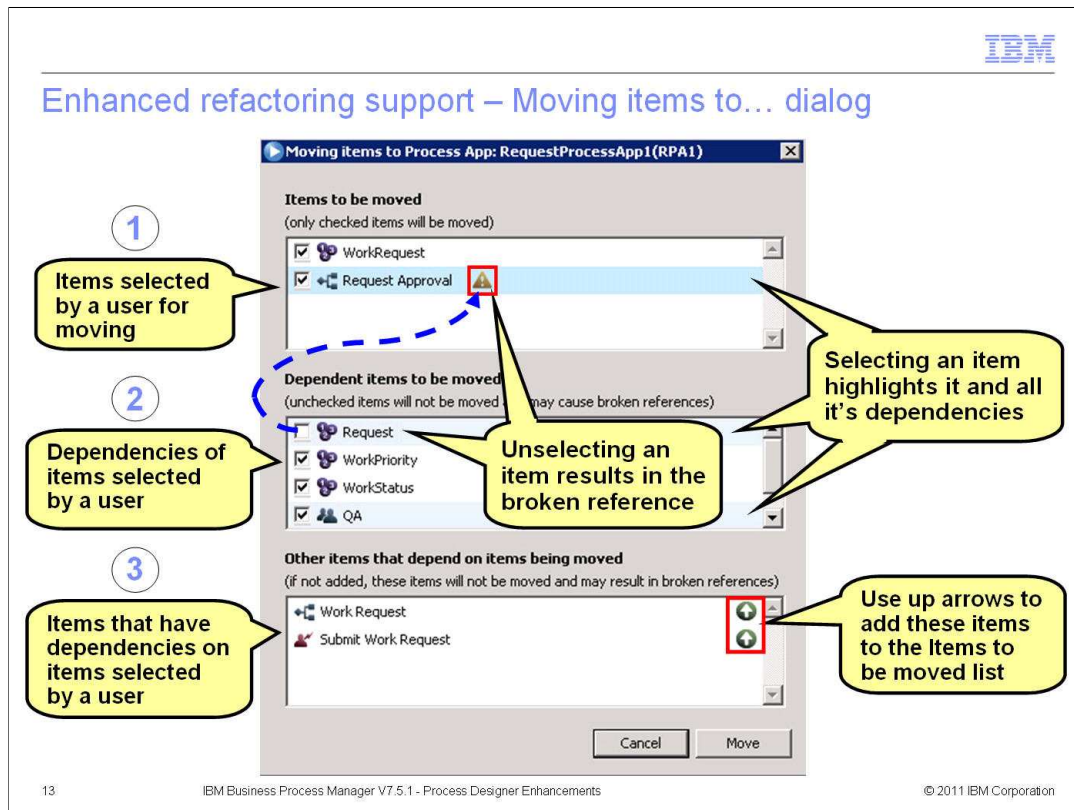
You can move existing library items to a new or existing process application or toolkit using the pop-up menu option “Move item to...”. In version 7.5.1, you can also drag items from a process application or a toolkit to a dependant toolkit. The behavior is the same when you use the “Move item to...” pop-up menu option or the drag option. You can move items to a different process application or a toolkit which you have write access to.

You can now move items with dependencies using the new Moving items to... dialog. When you select items in the library and initiate move either by drag or by using the context menu, this dialog is launched. It lists all the items selected by you in the library and their dependencies. These dependencies include referenced items and the items that are in the same WSDL or XSD files as the items that you selected.

The dialog also shows the items that depend upon the items selected in the library. These items are not part of the move by default. You have to explicitly add them to the list of items to be moved. When you add these items for moving, the dependencies list is updated to include the new dependencies.

The screen capture on the next slide shows the dialog in detail.

Enhanced refactoring support – Moving items to... dialog



The Moving items to.. Dialog has three sections. The first section displays all items that you select in the library to move. The second section displays all dependencies. The third section displays all items that have dependencies on the items displayed in the first section. When you initiate a move, the dialog is launched with all items in the first and second sections checked. You can uncheck any item that you do not want to move in either section. When you uncheck an item, all its dependencies are removed from the second section. Also, a warning marker is displayed besides all the items that have a dependency on the unchecked item indicating a validation error. In the image on the slide, a Business Object called Request is unchecked in the dependencies list. This results in a validation error in the Request Approval process which is indicated by the warning marker besides the process.

The dialog provides a neat feature to review the dependencies of an item. Select an item in either section. The item is highlighted with blue color and all other items that depend upon the selected item are highlighted with lighter blue color. In the image on the slide, the process Request Approval is selected to review its dependencies. The Business Object called Request and a Participant Group called QA are highlighted in the dependencies list.

If you want to include an item in the third section for moving, click the up arrow besides the item. The item is then added to the first section. The dependencies list in the second section is updated to list the new dependencies, if any.

Enhanced refactoring support – What happens after move?

- Automatic snapshot generation for the target toolkit or process application with a default name
- Name conflict, if any, resolved by appending the next sequential number to the name of the moved item
- New snapshot added to the dependency list in the case of toolkit

The screenshot displays the IBM Business Process Manager interface. On the left, the 'REQUEST APPLICATION' section shows a tree view with categories like Processes, User Interface, Implementation, Decisions, Data, Performance, Setup, and Files. Under 'TOOLKITS', 'System Data (7.5.1)' is expanded to show 'Application Toolkit (Move 1)'. A callout points to a dropdown menu showing 'Move 1' with a note: 'Automatically generated snapshot after move'. Below it, a list of snapshots shows 'Request Application (JKSREG)'. On the right, the 'Process App Settings' dialog is open, showing 'Business Objects' with 'WorkPriority' and 'WorkPriority2'. A callout points to 'WorkPriority2' with the note: 'Name conflict resolved by appending "2" to the name'. Another callout points to 'Application Toolkit (Move 1)' with the note: 'Dependency added to the new toolkit snapshot'.

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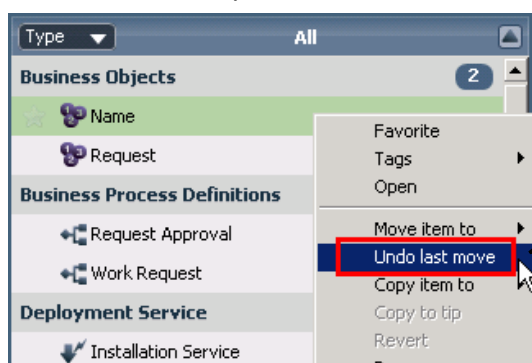
Once you check all items to move in the dialog and select Move button, the move operation completes. An automatic snapshot is generated for the process application or the toolkit where you moved the items to. A name assigned to the automatically generated snapshot starts with “Move” and has a number appended to it. For example, the first snapshot is generated with the name Move 1. If a user creates another snapshot with the name Move 2, then the next automatically generated snapshot after the move is assigned a name Move 3.

If you move items to a toolkit, then the new snapshot is added to the toolkit dependency list by default as shown in the image.

If the moved item has a name conflict with an existing item in the target process application or a toolkit, the moved item’s name is appended by the next sequential number.

Enhanced refactoring support – undoing move operation

- The undo completely reverses the move except that any new process application or toolkit created as a result of the move are deleted
- Move cannot be undone if artifacts in source or target process app/toolkit are modified
 - Undo last move menu option is disabled



You can examine the results of the move and if you are not satisfied, you can undo the operation immediately. The “Undo last move” menu option is added in version 7.5.1 for reverting back the move operation. The undo operation reverses the move results completely. The automatically generated snapshot is deleted.

However, any new process application or toolkit created as a result of the move is not deleted. The new process application or toolkit remains with no contents.

Once you begin working again after performing the move, the changes cannot be undone. The “Undo last move” menu option is disabled.

AIS emulation when running a BPD

- Unimplemented AIS always emulated
- Implemented AIS emulated when explicitly chosen by user
 - A new check box “Emulate Service” in the AIS editor
 - Displayed only when AIS is implemented
 - Not selected by default

Advanced Integration Service

Common

Name: Standard Process AIS
 Modified: admin (Nov 6, 2011 6:45:18 PM)
 Documentation: [Text Area]

Emulate Service:

Advanced Integration Service

This service is implemented and deployed into the Process Center using IBM Integration Designer. The advanced integration service can be used like any other service.

Module name: Request_Application_Implementation
 Export name: StandardProcessAIS
 Operation name: invoke
 Can be used with service?: Yes

Open in Integration Designer

New option shown for an implemented AIS

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You can now emulate an advanced integration service, commonly referred to as an AIS, during the BPD playback.

By default, an unimplemented AIS is always emulated.

After an AIS is implemented in IBM Integration Designer, you can explicitly turn on the emulation. A new option Emulate Service is displayed in the AIS editor when an AIS is implemented. By default, this option is not checked, which means the actual service is run when running a BPD. You can check this option to emulate an AIS.

When running an AIS in an emulation mode, a coach is launched. You can enter the output values in this coach to emulate the service implementation.

Enhancements to BPMN 2.0 import

The screenshot shows two windows from the IBM BPMN 2.0 import process:

- Import Process App:** This window shows the configuration for a new process app. It includes fields for 'Process App Name' (BPMN64 - Tagged and Scoped c), 'Acronym' (BPMN64T), and 'Description'. A red box highlights the 'Select an option for the unimplemented services:' section, which contains two radio buttons: 'Generate Advanced Integration Services' (selected) and 'Generate Integration Services'. A yellow callout bubble points to this section with the text: 'Option to choose the type of service to generate when using IBM BPM Advanced edition'.
- Import Results:** This window displays a summary of the import results. At the top right, there are filter buttons for 'All', 'Errors(0)', and 'Warnings(132)'. A yellow callout bubble points to these buttons with the text: 'Ability to filter messages'. The main area contains a list of messages, such as 'BPMN0021: The role or resource "Enterprise Process" was transformed into participant group "Enterprise Process"'. At the bottom right, there are 'Save' and 'Close' buttons. A yellow callout bubble points to the 'Save' button with the text: 'Save import summary to a text file'.

At the bottom of the slide, the following text is present:

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When you are using IBM BPM Advanced edition, the import dialog allows you to choose if an Advanced Integration Service should be generated or an Integration Service should be generated for an unimplemented service. For an implemented service, an Integration Service is generated always.

The Import Results dialog displays the summary of import results with error, warning and information messages. You can filter the messages using either the Errors or Warnings option at the top right of the dialog.

You can now save the summary in a text file format for reference. All messages are saved always. The filter applied only affects the display of the messages in the dialog. It's not taken into account when saving.

Enhancements to BPMN 2.0 import - Snapshot and tag generation

New snapshot called "Initial Import" created when a BPMN 2.0 archive is imported

Matching tags created per the tags in the source file

What artifacts are tagged?
Processes, Services, BOs and Participant groups

Imported artifacts associated with corresponding tags per the source file

Tag example in a BPMN source file

```
<bpmn:extensionElements>
  <tagging:tag>IFW v8.4</tagging:tag>
  <tagging:tag>Accounting Management</tagging:tag>
</bpmn:extensionElements>
```

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The BPMN 2.0 import has been enhanced to provide better traceability and search.

A new snapshot is generated when a BPMN 2.0 archive is imported. The snapshot records the state of library items right after import. A default name "Initial Import" is assigned to the snapshot which you can change at a later time. If you invoke import from a Process Apps tab, a process application snapshot is created. If you invoke import from a Toolkits tab, a toolkit snapshot is created.

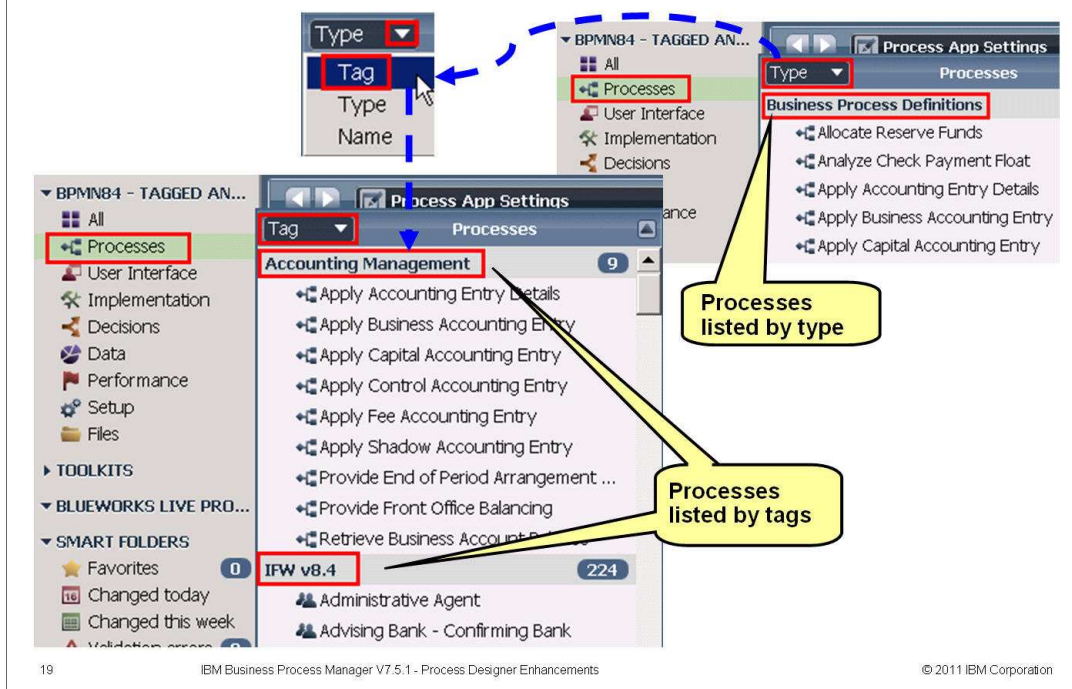
If the BPMN 2.0 source file contains tag information, matching tags are created on import as per the tag information in the source file. A tag is just a string which you want to identify certain items by. You can think of it as a name for a group of items. You can use the tags to find items at any time.

All items tagged in the source file when imported are associated with the tags created in Process Designer. Items that can be tagged include Processes, Services, Business Objects, and Participant Groups.

Tagging is an IBM extension.

The slide shows an example of this extension. There are two tags defined here – IFW V8.4 and Accounting Management. The next slide shows the tagged items after the import.

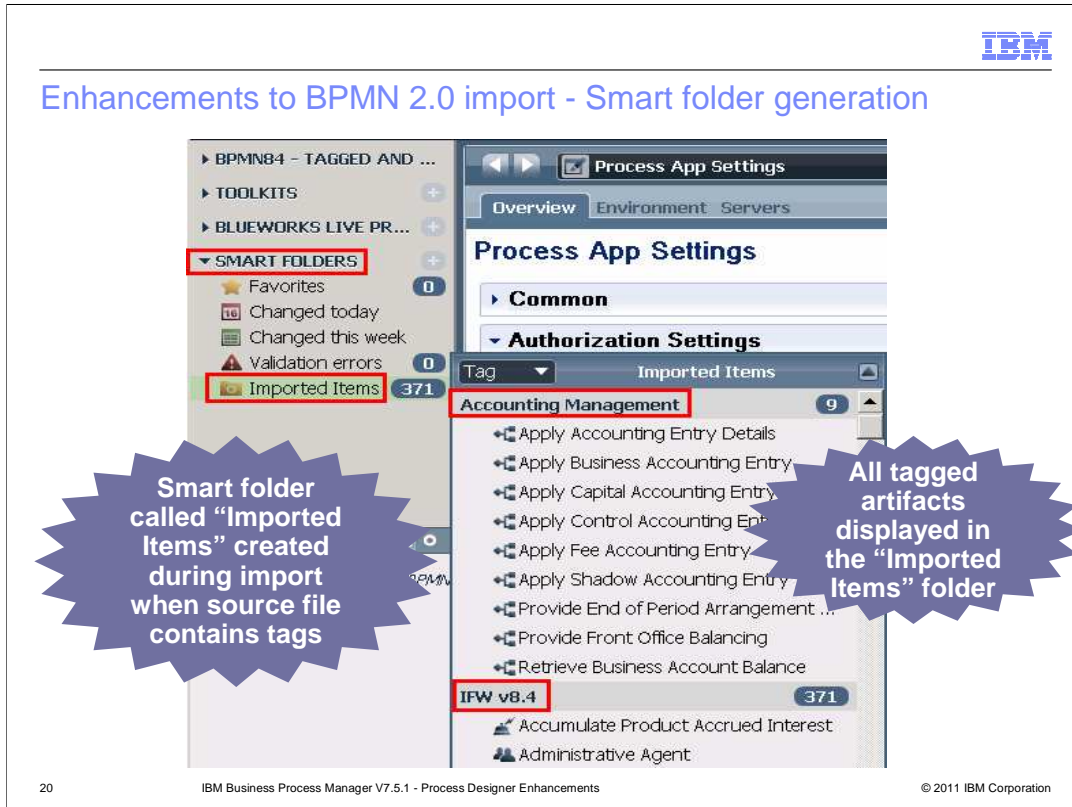
Enhancements to BPMN 2.0 import - Tag generation



Two tags IFW V8.4 and Accounting Management are created after import.

Normally, items are listed by Type when you select a category in the Library as shown in the screen capture at the top right. To view items based on tags as shown in the screen capture at the bottom left, select the Tag option in the drop down list for a category.

Enhancements to BPMN 2.0 import - Smart folder generation



Another BPMN 2.0 import enhancement is the smart folder generation. A new smart folder called "Imported Items" is created during import when the source file contains tag information. "Imported Items" folder displays all tagged items as shown in the image.

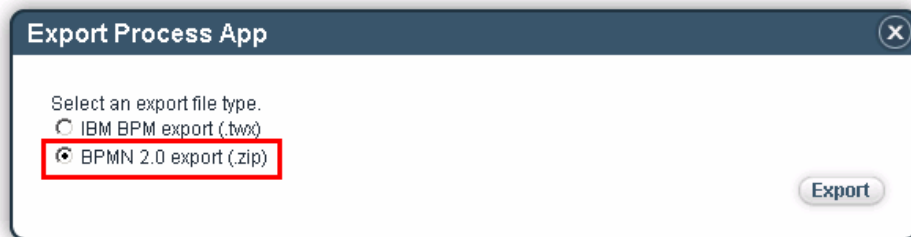
You can rename the folder if required.

BPMN 2.0 Export

New export option for BPMN 2.0 export as zip

What gets exported?

- ✓ Items with BPMN 2.0 semantics
- X IBM Extensions, e.g. tags

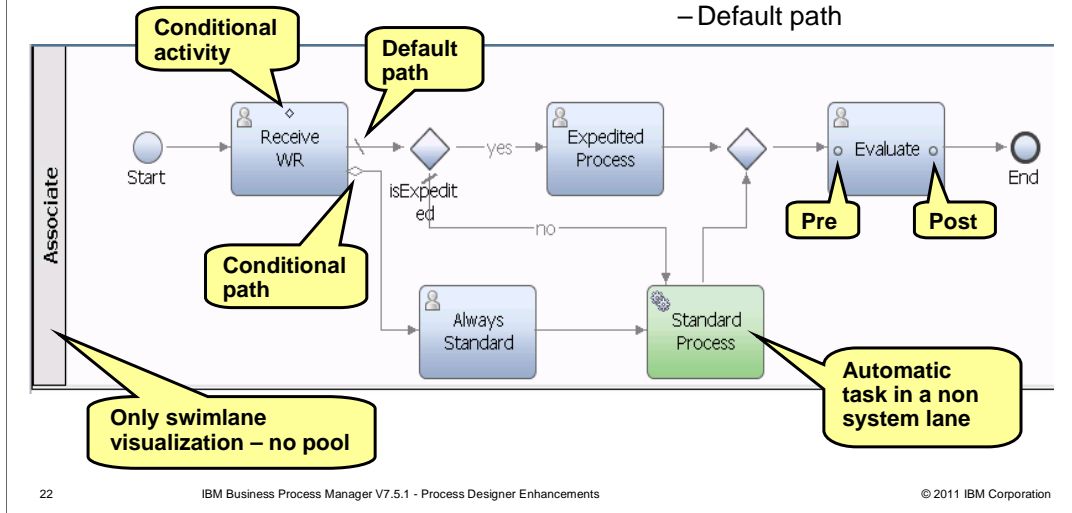


In version 7.5.1, you can export a process application or a toolkit to a BPMN 2.0 file archive for exchange with other BPMN 2.0 compliant systems. A new option is added to the export dialog as shown in the diagram for BPMN 2.0 export.

The export includes items with BPMN 2.0 semantics only. IBM extensions such as tags are not included in the export.

Visualization improvements

- Pools no longer visualized
- Ability to place automatic tasks in any lane
 - System lane not a must anymore
- Visual annotation for
 - Pre and post assignments
 - Conditional activity
 - Conditional path
 - Default path



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IBM Business Process Manager V7.5.1 - Process Designer Enhancements

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This slide gives an overview of visualization improvements in process diagrams.

Pool are no longer visualized creating more real estate for diagrams.

You now have flexibility when placing automatic tasks allowing for better layout. It is not mandatory to place them in the System lane.

Visual annotation is shown on diagram elements when certain properties are set. These properties include Pre and post assignments that allow updating of variable values before and after the activity running, Is Conditional on an activity to indicate that the activity should only be run if the condition specified is true, otherwise, the activity should be skipped, and Condition on a link to indicate that this path should be taken when the condition associated with the link evaluates to true. An annotation is also shown on a default path to indicate that this path is taken when the conditions associated with other links evaluate to false.

Summary

- Process App/Toolkit settings editor as a single editor to define global settings, environment variables and server configuration
- Sleek palette giving more real estate for process diagrams
- Properties view and Activity Wizard updates to change element type
- Direct edit capability for updating element names
- Ability to refactor artifacts along with their dependencies
- Ability to emulate AIS during playback
- Enhanced BPMN 2.0 Import and addition of BPMN 2.0 Export
- Visual annotation on diagram elements

In today's session, you learned about the functional and visualization enhancements done in Process Designer in version 7.5.1.



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