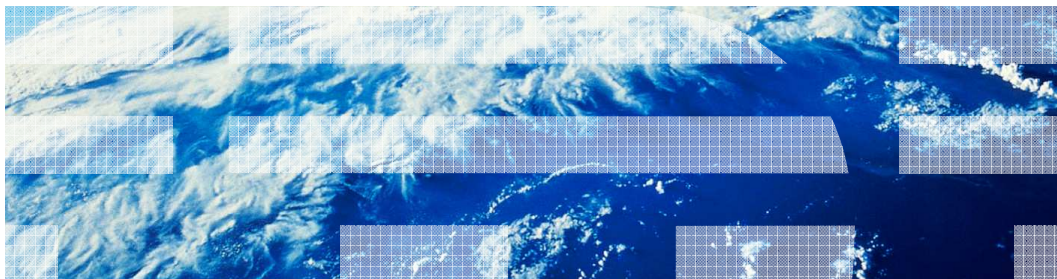


# Business Process Management

## IBM Business Process Manager V8.0.1

### New in IBM Business Process Manager V8.0.1



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This presentation introduces you to the IBM Business Process Manager, providing an overview of functionality delivered in V8.0.1 for selected areas.

## ***Introduction and agenda***

This section provides a brief introduction to the Business Process Manager V8.0.1 and an agenda for the presentation.

## Introduction and agenda

- Business Process Manager V8.0.1:
  - Provides several new features that enhances the products
  - Is designed to enable process owners and business users
    - To engage directly in the business processes
    - To provide rapid time to value and improved user productivity
- Features highlighted in this presentation
  - Updates in Installation, Configurations, and Migration
  - Improvements in Coach Designer
  - Integration with SAP Solution Manager
  - Enhancements in Process Portal
  - Updates in governance capabilities
  - Enhanced integration with Enterprise Content Management systems

IBM Business Process Manager V8.0.1 is an update to the IBM comprehensive and consumable BPM V8.0 platform that provides visibility and management of your business processes. It includes tools and runtime for process design, execution, monitoring, and optimization. It is specifically designed to enable process owners and business users to engage directly in the improvement of their business processes. It is also designed for easy deployment and use straight out-of-the-box or in an easily customizable configuration. It helps to provide rapid time to value and improved user productivity.

Some of IBM BPM V8.0.1 highlights include updates to Installation and Configurations, improvements to Coach Designer that make it easier to use, an enhanced Process Portal that delivers a highly collaborative work experience, enhanced governance capabilities, integration with SAP Solution Manager, enhanced integration with Enterprise Content Management systems, a graphical view of information flow through business processes, and various other new features.

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## Section

# ***Installation, configurations, and migration***

This section provides details about updates in installing and configuring IBM BPM V8.0.1.

## Installation and configuration

- Default versions
  - IBM Installation Manager – 1.6.0
  - IBM WebSphere Application Server – 8.0.0.5
  - IBM DB2 Express – 9.7.0.4
  - IBM DB2 – 10.1 supported
  - IBM BPM – 8.0.1.0
  - Browsers: Chrome and Safari 5 support added
- Typical install
  - Username / Password entry
  - Data Panel simplified
- Match Cognos bit selection
- Avoid port conflicts
  - Each component assigned a port range
- Separation of template and response files

- Editions
  - Standard
  - Advanced
- Profiles
  - Stand-alone
  - Managed
  - DMgr
- Profile Types
  - Process Center
  - Process Server
- Databases
  - DB2
  - Oracle
  - SQL Server
  - DB2zOS

For the BPM version 8.0.1 release the installation manager has moved up to version 1.6.0. This must be installed before an upgrade is made to 8.0.1. The application server version is now 8.0.0.5 which is upgraded and installed along with the BPM express, standard or advanced installation. The IBM DB2 Express version 9.7.0.4 is available during installation but IBM DB2 10.1 is also supported. The support for Chrome and Safari 5 browsers has also been added.

During typical install the username and password can be set on the installation panel and the data base selection panel is simplified for DB2 Express as the default. The installation will now recognize the installed application server bit version for cognos and validate that the correct version is being installed for BPM. To help avoid port conflicts during installation, each component has a range of ports that it will use based on the starting port specified for that installation.

The template and response samples have been simplified to help eliminate confusion by removing the multiple operating systems and providing separate files for editions, profiles, profile types and databases.

## Migration and upgrade

- New parameter for iFix in upgrade tool for each iFix number
- Upgrade process
  - Back up
    - profiles – backupConfig
    - Databases
    - XSL transformation files - *install\_root/ProcessChoreographer/Staff* directory
  - Stop all WebSphere processes
    - WASServiceMsg.dll (reboot might be required)
  - Install refresh pack (verify no errors)
  - Profiles – restoreConfig fileName
  - Update the database
  - Upgrade BPC
  - Restart the stand-alone server – Verify success
- Added –all option for cluster migration

A new parameter for the iFix upgrade tool now allows a specific iFix number to be specified. The upgrade to version 8.0.1 requires that these steps be followed to backup and restore any profile and application data. The back up of profiles, databases and transformation files for Process Choreographer are needed. After stopping all WebSphere processes, a reboot of the system might be required to remove resources that have not been released. To upgrade to version 8.0.1 the installation manager must be upgraded to version 1.6.0. Then the specific BPM version and application server can be upgraded. Be sure to verify that there were no errors once the upgrade has completed. Run the restoreConfig command file with the fileName that was created with the backupConfig command. Update the databases for the specific database installed and restore the Process Choreographer transformation files if needed. The server can now be started. In a clustered environment, this process must be done for each cluster. To help with the upgrade cluster process a –all option has been added to the upgrade scripts which will find and upgrade all clusters.

## Standard operating environment

- Option to disable failed event manager in administrative console
- Server startup time reduction when using LDAP
- WebServices Remote Portlet specification support
- Simplify Lombardi XML configuration files

For the standard operating environment few changes have been made to improve performance and standards compliance. An option has been added in a configuration file for the failed event manager which will remove it from the administrative console. The server startup has been greatly reduced when using LDAP by using LDAP filters to limit return values. The WebServices Remote Portlet specification version 2.0 has been added to enable dashboard portlets to run in the BPM portal. There have also been some improvements to the Lombardi XML configuration files which move some of the system parameters into the BPM XML configuration.

## Information center

- Updated installation, configuration, and migration governance information
- More information in the information center for configuring 99Local.xml and 100Custom.xml files
- New information center content
  - SAP Solution Manager integration
  - ECM integration, including event subscriptions
- More fine-grained control over search in the information center
- Enhanced information center and embedded assistance content for coaches

The Info Center has been updated with the latest information for installation, configuration, migration and governance to support version 8.0.1. Changes in the Lombardi configuration files 99Local.xml and 100Custom.xml have been included. New content has been added for SAP solution manager and ECM integration, including event subscriptions. The search in the Info Center is now has more fine-grained control. Enhanced and embedded assistance content for Coaches has also been added.



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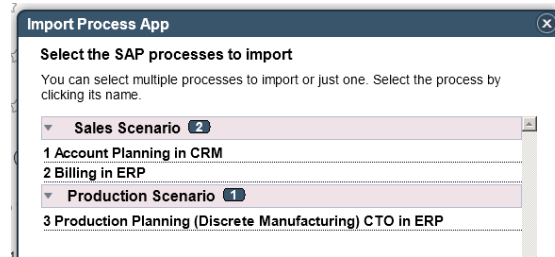
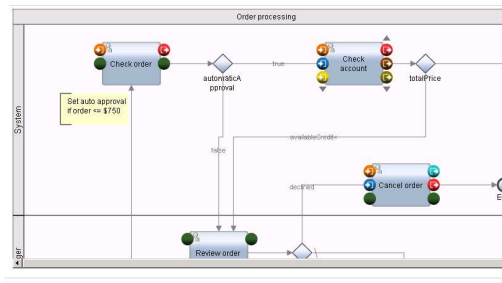
## Section

# ***Process Designer***

This section provides details about enhancements in Process Designer of IBM BPM V8.0.1

## What's new for Process Designer V8.0.1

- Data flow visualization
  - Tag groups
- Web services enhancements
- SAP Solution Manager integration
- Linking to resources



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IBM Process Designer has several enhancements for version 8.0.1.

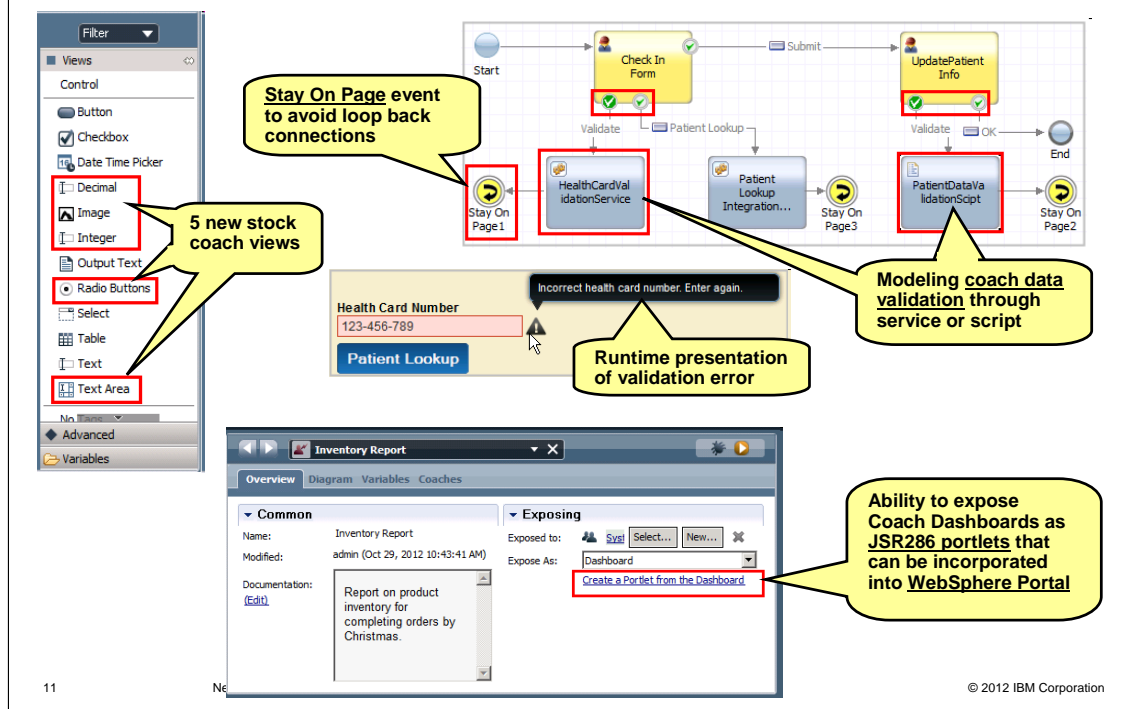
A process uses many variables to contain data that flows in and out of process activities. A new data flow visualization diagram has been added to make it easy to visualize the flow of data objects. This is useful especially when validating your process and the data flows within it.

Tag groups contain meta data that is associated with the implementation of process activities. These are also shown on the data flow visualization diagram.

There are also several enhancements to web services. You can catch errors in an outbound web service integration using “catch all” semantics. You can now specify web services target endpoint addresses that are snapshot independent. And WSDL discovery has been improved to provide better feedback when there are WSDL errors.

There is a new integration feature for SAP which is intended to enable the exchange and enrichment of process model data between IBM BPM and SAP Solution Manager. You can import blueprints from SAP Solution Manager, make changes in Process Designer, then export them back to SAP.

## What's new for Process Designer - Coaches V8.0.1 (1 of 2)



IBM Business Process Manager version 8.0 introduced completely redesigned coaches that are composed of reusable coach views. Further enhancements are done to the new coaches in version 8.0.1.

5 new stock coach views are introduced that eliminate the need to create custom coach views for type specific behavior, for flexible multiline text input, for image display and for radio button selection behavior.

Defining coach data input validation is made easier. You can model validation using a service or even simpler - a server script. Runtime presentation of a validation error can be customized using an event handler.

The new “stay on page” event allows you to model looping back to the coach without actually creating a loop back link to the coach thus reducing the clutter in the diagram.

The ability to use Coach based Dashboards in WebSphere Portal is provided by allowing exposing of Coach Dashboards as JSR286 portlets.

## What's new for Process Designer - Coaches V8.0.1 (2 of 2)

**Better support for binding coach view**  
- Only matching variables presented by default to bind to

**Smarter view selection for coach view instance**  
- Only matching views presented by default

**Improved Properties->Configuration page**  
- Support for grouping related options  
- Better rendering of lists and complex objects

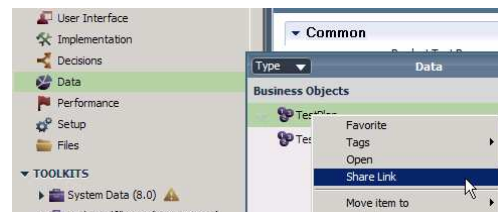
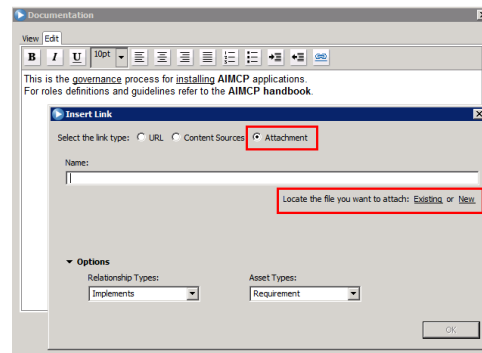
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When selecting binding, the dialog displays variables that match the declared type of the view. Similarly, if binding is already defined, then when selecting a view, the dialog displays only the views whose type matches the current binding.

Configuration property page of a coach view is enhanced to allow grouping of related options, to effectively render complex objects allowing progressive disclosure and to render lists as tables.

## Linking to resources

- In the description of the Process Application or Toolkit, you can create links to external resources
  - **Attachment link**
    - A link to an external document or file
    - Imports the document or file
    - Stored with the model
- To share the documentation for a Process Application or Toolkit with an external document or to send in an email
  - **Share Link**
    - A link to internal documentation that you can share with others
    - Appropriate security checks are made when someone uses a share link
- **JavaScript APIs** – for getting links
  - APIs for querying and retrieving the links from the Process Center



In 8.0 there are Content Links and URL links.

Attachment Links and Share Links are new for 8.0.1

Attachment links are for linking to documents and files that are outside of the Process Designer and Process Center. It is a way to include external resources in your internal documentation. When you use an Attachment Link to link to a document, the document is imported into the Process Application and stored in the Process Center as part of the Process Application

Share links are for sharing your internal documentation with resources outside of the Process Designer and the Process Center. When a person uses a Share Link that you've shared with them, they are prompted for their user ID and password and will only be allowed to see information based on their access privileges.

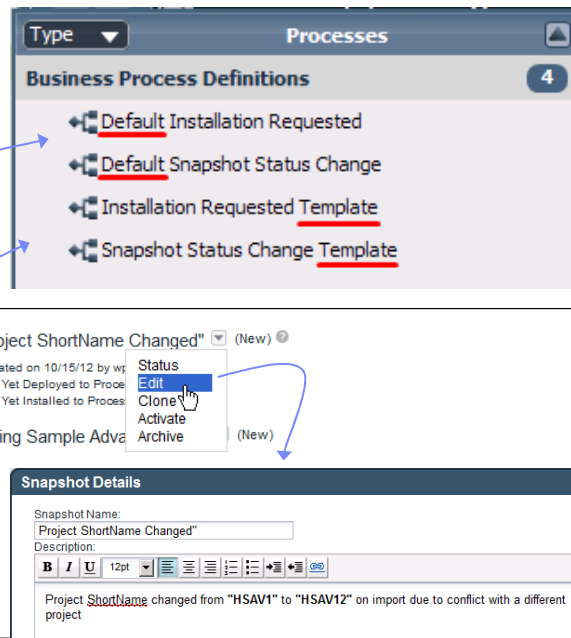
Along with the new types of links are JavaScript APIs that enable you to query the Process Center for the links so that you can use them programmatically within your business processes.

## ***Process Center enhancements***

This section provides details about enhancements in Process Center of IBM BPM V8.0.1

## What's new for Process Center V8.0.1

- Process Governance
  - A new approach
    - Under Cover Agents (UCAs) are no longer used
    - Governance process associated directly with the process application
  - Default governance processes
    - Snapshot status change
    - Installation requested
  - Templates
    - Input data types are defined
    - Snapshot status change
    - Installation requested
- In-line editing of rich text
  - Description of the snapshot details



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New in IBM Business Process Manager V8.0.1

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The way in which you configure and manage the governance of your business process application has become easier and more flexible with BPM V8.0.1.

To begin with, you are no longer required to use the under cover agent, the process being governed is directly associated with the governance process. This means that you can easily create a unique governance process for each business process application.

You are also provided with two default governance processes which are used automatically if you do nothing. The default governance processes do not do anything. They are place holders until you develop your own. To help you develop your own governance processes there are two templates. The templates provide you with the correct inputs and outputs and the corresponding business objects. The installation requested template will help you get started developing a governance process around the installation of snapshots. The snapshot status template will help you develop governance processes around the entire snapshot life cycle.

With V8.0 you can now use rich text formatting in the description field of the snapshot details.

Reference links have also been enhanced.

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Section

## ***Process Portal enhancements***

This section provides details about enhancements in Process Portal of IBM BPM V8.0.1



## What's new for Process Portal V8.0.1

Process Portal has been enhanced so that process participants can work more efficiently and effectively

**Process Portal now includes these new features:**

- Improved log-on and dashboard performance
- The ability to bookmark a page to replace the default Process Portal start page
- Support for IBM Connections integration, which enables the default Process Portal business card to be replaced with the Connections business card
  - See below
- Enhanced email notifications that enable participants to go directly to either a specific task or the process instance information within the portal
  - Enabled in the 100Custom.xml file
  - User configured in the Process Portal Preferences

The Process Portal for BPM V8.0.1 has been enhanced so that process participants can work more efficiently and effectively.

You will notice the improved performance when logging into the Process Portal and working with the dashboards. To help you get back to your work quickly, you can set a specific page to become your start page.

If you use the IBM Connections, you'll be able to use your business card that you have defined there in your Process Portal profile. And when you receive an email notification, you be able to go directly to specific task or the process instance.

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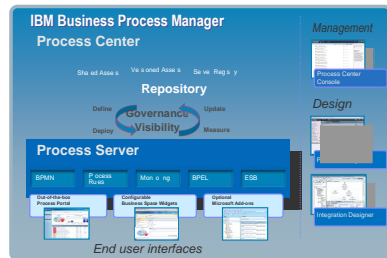
## Section

# ***Enhanced integration with ECM systems***

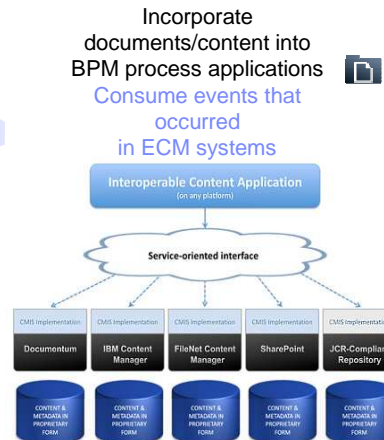
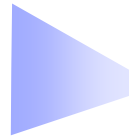
This section provides details about enhancements in integrating with Enterprise Content Management systems of IBM BPM V8.0.1.

## Support inbound events from Enterprise Content Management systems

- Enables processes modeled in IBM BPM that instantiate, continue or end based on a content event
  - Example - New loan application document received, updated information (metadata) for an insurance claim, deletion of a mortgage document



Support access to common ECM systems by leveraging the Content Management Integration Services (CMIS) standard



In IBM BPM V8.0.1, you can now create event subscriptions and design business processes and services that detect and respond to inbound content events from Enterprise Content Management (ECM) systems. It provides capabilities for creating sophisticated business processes that can initiate processes or react in running processes based on content events that occur in an ECM system, such as when documents, folders, or their properties are created, updated, deleted, checked in, or checked out. IBM BPM V8.0.1 provides an event handler that can be installed and configured in IBM FileNet Content Manager V5.1 or later. Lastly, IBM BPM V8.0.1 also provides documentation on how to create event handlers for other ECM systems.

## Support additional ECM outbound operations and business objects

- Additional ECM outbound operations
  - Move Folder
  - Copy Document
- Business Objects for inbound
  - Provided in Content Management Toolkit
    - ECMContentEvent
    - ECM Event Class
    - ECM Event Type

In V8.0.1, you are also introduced to two additional operations for outbound. These are Move Folder and Copy Document operations. The Move Folder operation can move the targeted folder to new location, and the Copy Document can make new copy of a particular document with new name and additional properties.

For inbound events, the ECMContentEvent business object is now included in the Content Management toolkit. It is used to pass generic ECM event data to an event subscription service and Content UCA. The ECM Event class are simple String base type and are indicated whether your event class is Document or Folder. Lastly, when you configure an event subscription in Process Designer, you must specify the type of content event that you want to receive when a specific content change occurs on an ECM server.

## ***Summary and resources***

The presentation summary and additional resources are provided in this section

## Summary

- Summary of presentation
  - Introduction to the IBM Business Process Manager V8.0.1
  - Overview of new features introduced in V8.0.1
    - Updates in Installations and Configurations
    - Improvements in Coach Designer
    - Enhancements in Process Portal
    - Enhancements in governance capabilities
    - Integration with SAP Solution Manager
    - Enhanced integration with Enterprise Content Management systems
- Link to additional resources:
  - Announcement

<http://www-01.ibm.com/common/ssi/cgi-bin/ssialias?subtype=ca&infotype=an&appname=iSource&supplier=897&letternum=ENUS212-394>

- BPM V8.0.1 information center

<http://pic.dhe.ibm.com/infocenter/dmndhelp/v8r0m1/index.jsp?topic=%2Fcom.ibm.wbpm.main.doc%2Fic-homepage-bpm.html>

The presentation started with an introduction to the IBM BPM V8.0.1 product, providing some background and listing the included features. There are updates to Installation and Configurations, improvements to Coach Designer, an enhanced Process Portal, enhanced governance capabilities, integration with SAP Solution Manager, and enhanced integration with Enterprise Content Management systems. There are also links provided to enable you to further understand these new features. The first is to the IBM BPM V8.0.1 announcement, which provides an excellent overview, and the second is to the information center for V8.0.1.

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