# WebSphere® Business Modeler V6.1

## *Human tasks and forms support*

@business on demand.

This presentation will discuss the Lotus® Forms support for human tasks in WebSphere Business Modeler V6.1

# Human tasks and IBM Lotus Forms

- IBM Lotus Forms provides a very powerful way to create forms associated with human tasks.

- The forms used in WebSphere Business Modeler V6.1 are IBM Lotus Forms.
  - ▶ They can be imported or
  - ▶ Created directly in WebSphere Business Modeler V6.1
    - Forms viewer  - used for displaying and printing forms
    - Forms designer  - used for designing the layout of the forms

A new feature that is being introduced to WebSphere Business Modeler, beginning with V6.1 is the ability to use IBM Lotus Forms for the inputs and outputs of the human tasks.

IBM Lotus Forms is a separate product that has a design and runtime component. WebSphere Business Modeler V6.1 works with the design component, either the forms viewer or the forms designer. Typically the forms are created in Lotus Forms Designer, exported from the designer and then imported into WebSphere Business Modeler, where they can then be associated with the inputs and outputs of the human tasks.

Either product, the Lotus Forms Viewer or the Lotus Forms Designer, can be installed into the same package as WebSphere Business Modeler V6.1.

Which product you use will depends on where you expect to do the design work for the forms. Is creating the input and output forms part of the higher level analysis of the business process done in WebSphere Business Modeler or is it something done as part of the implementation, using WebSphere Integration Developer?

# There three basic kinds of forms

- Input

- Output

- Input/output
  - The input data must be the same as the output
    - Order, type and cardinality

- More than one form can be associated with a given human task
  - This allows for the case where the input data and the output data are not the same.

3

When working with forms and human tasks in WebSphere Business Modeler V6.1, there are three kinds of forms. There is the input form, the output form and the input/output form. The input/output form is used when the person working on the task has to update a certain part of the data that is flowing through the task. If a single form is used for the input and the output then you must be sure that the data on the output matches the input data precisely, in all ways. The order of the attributes, the type and the cardinality must all be the same.

Creating a form for a human task

- Processes → New → Form, from the pop-up menu of the project tree

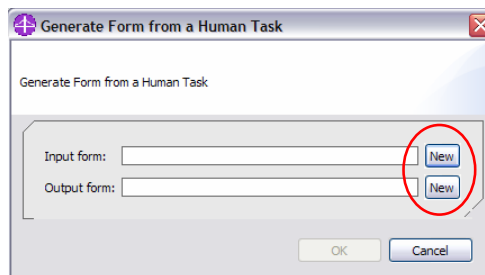There are many ways to create a default form in WebSphere Business Modeler V6.1.

This slide shows you how to create a new form using the pop-up menu of the processes folder. You can see that when a form is created in this way you'll get a warning. It alerts you to the fact that you need to have either the Forms Viewer or Forms Designer in order to work with the form being created.

In this scenario, since the forms viewer has been installed, you'll be presented with an opportunity to specify the data to be used with the form. Once the default form has been created, it is displayed in the viewer.

Forms can also be created from the Forms tab of the attributes page for a local human task and the Forms tab of the specification page for a global human task.

Creating a form from a human task

- The form can also be created from the pop-up menu of a local human task.
  - Data must already be associated with the human task.
    - If there are no data associated, then the *Generate Form…* option is not available.
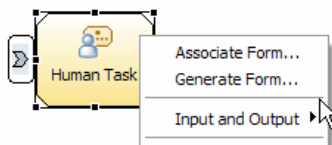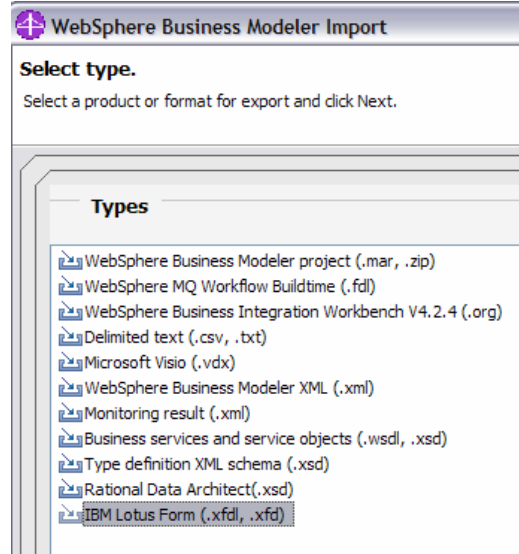
There are many ways that forms can be created. Here you can see that a form can be easily generated from an existing human task.

When creating a form in this way you're given the opportunity to create an input or output form or both.

Simply right mouse click on the human task element in the process diagram and select generate form.

# Importing a form for a human task

- A special import type is available for the IBM Lotus Forms.

- Form data are imported a Business Service Objects
  - immutable

**WebSphere Business Modeler Import**

**Select type.**

Select a product or format for export and click Next.

**Types**

- WebSphere Business Modeler project (.mar, .zip)
- WebSphere MQ Workflow Buildtime (.fdl)
- WebSphere Business Integration Workbench V4.2.4 (.org)
- Delimited text (.csv, .txt)
- Microsoft Visio (.vdx)
- WebSphere Business Modeler XML (.xml)
- Monitoring result (.xml)
- Business services and service objects (.wsdl, .xsd)
- Type definition XML schema (.xsd)
- Rational Data Architect(.xsd)
- IBM Lotus Form (.xfdl, .xfd)

Human tasks and forms support
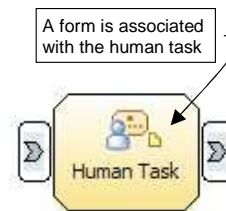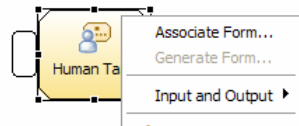
6

© 2008 IBM Corporation

A form can also be created using the IBM Lotus Forms Designer. In this case the completed form is exported from Lotus Forms Designer and then imported into WebSphere Business Modeler V6.1.

The data that are associated with the form are imported into modeler as service objects. Service objects are different than the business items typically used by the business analyst in that they cannot be changed once they are imported. They are immutable.

Note: If a business object already exists in the Modeler a new one is created with the same name but a different ID.

Associating forms with human tasks

- Drag an existing form onto a local human task
- Use the pop-up menu for a local human task
- Local human task
  - The forms tab in the attributes page
- Global human task
  - The forms tab of the specification sheet

Once a form has been imported, you then need to have a way to associate the form with the human task.

There are several ways to associate a form to a human task.

The easiest and most intuitive way is to drag the form from the processes catalog and drop it onto the human task. When you do this you'll be presented with a simple dialog that will let you associate it with the input, output or both.

Another way to make the association is to right mouse click on the human task icon and select associate form from the pop-up menu.

Or you can make the association by editing the attributes specification for the human task. There is a forms tab in both the local attributes page and the specification sheet for the global human task.

Once an association has been made, a little form icon is visible on the human task element.

**Re-associating a form with a human task**

- Using the global human task specification page or the local human task attributes….

- First disassociate the existing form
  - Then associate the new form, using *New* or *Browse*

IBM Software Group

8

Human tasks and forms support

© 2008 IBM Corporation

---
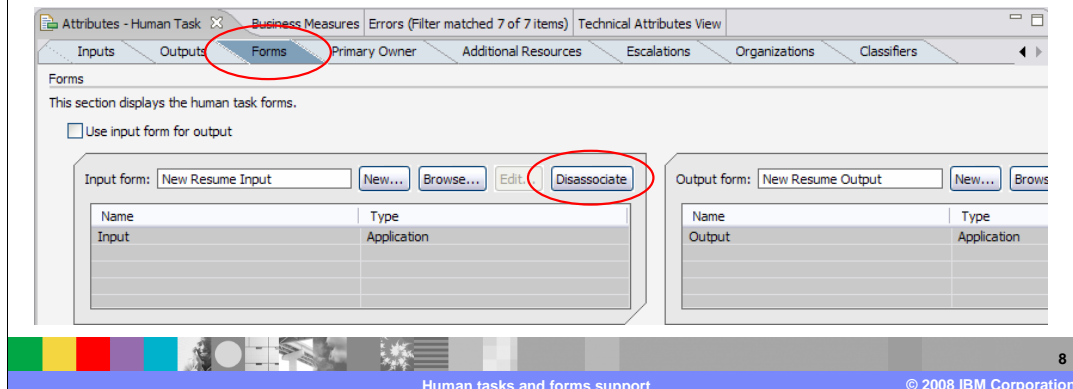
There are several ways to make the association between the human task and the form, but when you need to change an existing one, there is only one way to re-associate a form.

When a new version of a form needs to be associated with the human task the previous version must first become disassociated from the task.
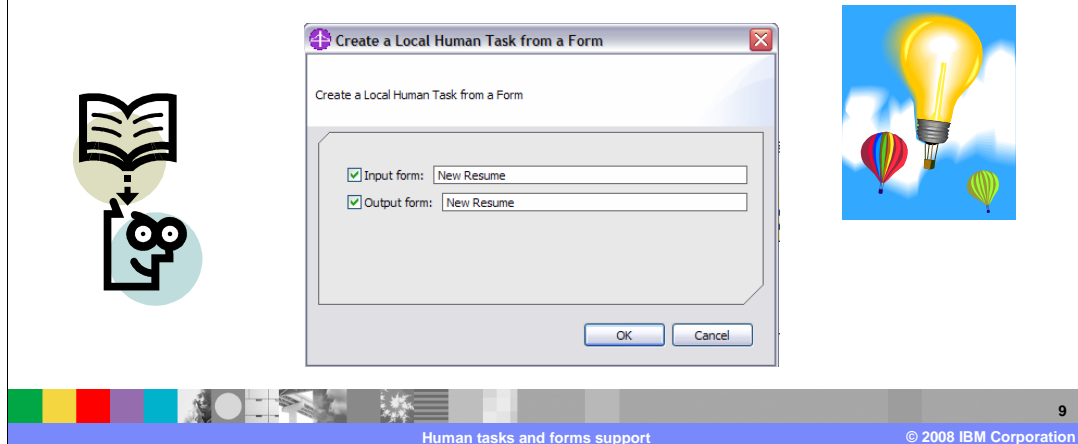
This is done in the forms tabs view of the local attributes page or the global specification sheet.

First dissociate the existing form and then browse to the new one.

# Creating a local human task from a form

- Drag the form from the project tree and drop it onto the process editor canvas.
  - ▶ A popup dialog appears letting you associate the form with the input, output or both.

### Create a Local Human Task from a Form

Create a Local Human Task from a Form

☑ Input form:   New Resume
☑ Output form:   New Resume

OK     Cancel

It is also possible to create a human task from a form.

Simply drag the existing form from the processes catalog and drop it onto the process editor canvas.

A pop-up dialog will appear allowing you to associate the form with input, output or both, for the newly created human task.

# Summary

First class support for input and output forms necessary for interacting with the human tasks

- ▶ IBM Lotus Forms
- ▶ Integration with IBM Lotus Forms Designer and Viewer
- ▶ Many ways to create and associate a form with a human task.

Human tasks and forms support

© 2008 IBM Corporation

10

IBM Lotus Forms provides a rich and powerful way to create standard and customized user input and output forms.

With the integration support for Lotus Forms provided in WebSphere Business Modeler V6.1, you can now import and use these forms with your human centric business process.

If the Lotus Forms Viewer is installed you'll be able to view the imported forms and if Lotus Notes Designer is installed, you'll be able to edit and update the forms in modeler as well.

# Feedback

## Your feedback is valuable

You can help improve the quality of IBM Education Assistant content to better meet your needs by providing feedback.

- Did you find this module useful?
- Did it help you solve a problem or answer a question?
- Do you have suggestions for improvements?

Click to send e-mail feedback:

mailto:iea@us.ibm.com?subject=Feedback_about_WBIV61_WBModelerUpdate_Forms.ppt

This module is also available in PDF format at: ../WBIV61_WBModelerUpdate_Forms.pdf

11

Human tasks and forms support

© 2008 IBM Corporation

You can help improve the quality of IBM Education Assistant content by providing feedback.

# Trademarks, copyrights, and disclaimers

The following terms are trademarks or registered trademarks of International Business Machines Corporation in the United States, other countries, or both:

IBM          Lotus          WebSphere

Product data has been reviewed for accuracy as of the date of initial publication. Product data is subject to change without notice. This document could include technical inaccuracies or typographical errors. IBM may make improvements or changes in the products or programs described herein at any time without notice. Any statements regarding IBM's future direction and intent are subject to change or withdrawal without notice, and represent goals and objectives only. References in this document to IBM products, programs, or services does not imply that IBM intends to make such products, programs or services available in all countries in which IBM operates or does business. Any reference to an IBM Program Product in this document is not intended to state or imply that only that program product may be used. Any functionally equivalent program, that does not infringe IBM's intellectual property rights, may be used instead.

Information is provided "AS IS" without warranty of any kind. THE INFORMATION PROVIDED IN THIS DOCUMENT IS DISTRIBUTED "AS IS" WITHOUT ANY WARRANTY, EITHER EXPRESS OR IMPLIED. IBM EXPRESSLY DISCLAIMS ANY WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR NONINFRINGEMENT. IBM shall have no responsibility to update this information. IBM products are warranted, if at all, according to the terms and conditions of the agreements (for example, IBM Customer Agreement, Statement of Limited Warranty, International Program License Agreement, etc.) under which they are provided. Information concerning non-IBM products was obtained from the suppliers of those products, their published announcements or other publicly available sources. IBM has not tested those products in connection with this publication and cannot confirm the accuracy of performance, compatibility or any other claims related to non-IBM products.

IBM makes no representations or warranties, express or implied, regarding non-IBM products and services.

The provision of the information contained herein is not intended to, and does not, grant any right or license under any IBM patents or copyrights. Inquiries regarding patent or copyright licenses should be made, in writing, to:

IBM Director of Licensing
IBM Corporation
North Castle Drive
Armonk, NY 10504-1785
U.S.A.

Performance is based on measurements and projections using standard IBM benchmarks in a controlled environment. All customer examples described are presented as illustrations of how those customers have used IBM products and the results they may have achieved. The actual throughput or performance that any user will experience will vary depending upon considerations such as the amount of multiprogramming in the user's job stream, the I/O configuration, the storage configuration, and the workload processed. Therefore, no assurance can be given that an individual user will achieve throughput or performance improvements equivalent to the ratios stated here.

© Copyright International Business Machines Corporation 2008. All rights reserved.

Note to U.S. Government Users - Documentation related to restricted rights-Use, duplication or disclosure is subject to restrictions set forth in GSA ADP Schedule Contract and IBM Corp.