

WebSphere. Lombardi Edition 7.2

*Lombardi for SharePoint 7.2.0 User
Guide*



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Introduction to the Lombardi for SharePoint User Guide

Welcome to the *Lombardi for SharePoint 7.2.0 User Guide*. This guide is intended for developers who need to integrate existing or new Lombardi business processes into IBM® WebSphere® Lombardi Edition for Microsoft® SharePoint Add-on 7.2.0.

Lombardi for SharePoint is an integrated add-on for Microsoft SharePoint that provides access to the Lombardi Process Portal inbox, other saved searches, and task execution and reporting capabilities through SharePoint web parts. This flexibility means that you can effectively maintain, manage, and analyze Lombardi tasks and process instances from any Microsoft SharePoint portal. For documentation about other interfaces in WebSphere Lombardi Edition, see the *Process Portal User Guide*.

Before you begin using Lombardi for SharePoint, you must follow the installation requirements as described in the *Lombardi for SharePoint 7.2.0 Installation and Configuration Guide*. After you have met the installation requirements, you can perform the tasks included in this user guide.

Using Lombardi Process Portal with Lombardi for SharePoint

Using IBM® WebSphere® Lombardi Edition for Microsoft® SharePoint Add-on 7.2.0, you can do many things in Microsoft SharePoint that you can do in the web-based Lombardi Process Portal, including:

- Launch processes from a list of Lombardi processes.
- View and perform assigned Lombardi tasks.
- Manage in-flight Lombardi processes, including starting and stopping process instances, viewing process diagrams, and resassigning tasks to balance workload.
- View real-time reports showing performance ScoreBoards for individuals, teams and/or business processes.

Lombardi Process Portal web parts

Using Lombardi Process Portal web parts, you can view data from Lombardi Process Portal inside a Microsoft® SharePoint site.

The following table describes the Lombardi Process Portal web parts.

Lombardi Process Portal web parts

Web part name	Description
Lombardi Saved Search	Display active tasks from a Lombardi saved search.
Lombardi Process Start	Launch Lombardi processes from a SharePoint site.
Lombardi ScoreBoards	Display Lombardi performance data from a SharePoint site.
Lombardi Embedded Web site	Display a ScoreBoard, report, or Coach within a SharePoint site.

Lombardi Saved Search web part

The Lombardi Saved Search web part enables you to select a saved search from Lombardi Process Portal to display. By default, the web part displays the Lombardi Process Portal Inbox, which is a saved search.

The Lombardi Saved Search web part displays the same list of process instances as the Lombardi Process Portal saved search that you select. You can launch a process instance directly from the Lombardi Saved Search web part by clicking on the linked process instance. The Lombardi Saved Search web part also supports business data columns.

To display the active tasks in the Lombardi saved search, click **Show Tasks**. Click **Show Instances** to display a list of running process instances. The parameters of the saved search are used to determine which view of the instances is shown. For example, if you clicked **Organize by Task** when defining the search in Lombardi Process Portal, then the search is displayed with the **Show Tasks** option selected by default.

To modify settings for the Lombardi Saved Search web part, follow these steps:

1. Click **Force Refresh** to manually request updated data from WebSphere Lombardi Edition.

2. You can select a Lombardi Process Portal saved search to display in the Web part. Click the **Current Saved Search** menu, then select a saved search.
3. In the Lombardi Saved Search web part properties window, you can modify the following settings:
 - **Lombardi Server URL:** Specify the name of the connected Lombardi server in the following format: `http://<server_name>:<port>`. For example, `http://servername:19086`.
 - **Authentication Mode:** Lombardi for SharePoint supports integrated authentication by default. The authentication mode is configured for each site template and the sample Lombardi Portal during installation, based on the authentication mode selected during the installation process. You can configure each web part to use either integrated or basic authentication. Click **Edit Mode**, then select the authentication mode for each page. If you select basic authentication, you must specify the authentication credentials for the Lombardi server, including username and password.
 - **Default Lombardi Portal Saved Search:** Click the **Default Lombardi Portal Saved Search** menu, then select a saved search. The Lombardi Process Portal Inbox is selected by default.
 - **Number of Tasks Per Page:** Specify how many saved tasks to display in the Lombardi Saved Search web part window.

Lombardi Process Start web part

To view and launch Lombardi processes from a Microsoft® SharePoint site, use the Lombardi Process Start web part.

To view a list of Lombardi processes in the Lombardi Process Start web part window, you must be a member of a participant group that has been given **Expose to start** access to one or more business process definitions (BPDs). For more information, see the section "Exposing BPDs" in the *Lombardi Authoring Environment User Guide*. You can run a process directly from the Lombardi Process Start web part by clicking on the link to the process.

Configure the Lombardi Process Start web part properties as follows:

- **Lombardi Server URL:** You must specify the name of the connected Lombardi server in the Lombardi Process Start Web part properties window. Specify the name of the connected Lombardi server in the following format: `http://<server_name>:<port>`. For example, `http://servername:19086`.
- **Number of Favorites Per Page:** Specify the number of process that are displayed in the Lombardi Process Start web part window.
- **Authentication Mode:** Lombardi for SharePoint supports integrated authentication by default. The authentication mode is configured for each site template and the sample Lombardi Portal during installation, based on the authentication mode selected during the installation process. You can configure each web part to use either integrated or basic authentication. Click **Edit Mode**, then select the authentication mode for each page. If you select basic authentication, you must specify the authentication credentials for the Lombardi server, including username and password.

Lombardi ScoreBoards web part

You can display Lombardi performance data from a Microsoft® SharePoint site using the ScoreBoards web part.

From the ScoreBoard launcher window, you can click on a ScoreBoard name, for example My Performance or My Team Performance.

Configure the Lombardi ScoreBoards web part properties as follows:

- **Lombardi Server URL:** In the Lombardi ScoreBoards web part properties window, you must specify the name of the connected Lombardi server. Specify the name of the connected Lombardi server in the following format: `http://<server_name>:<port>`. For example, `http://servername:19086`.
- **Number of ScoreBoards Per Page:** Specify the number of scoreboards to display in the Lombardi ScoreBoards web part.
- **Authentication Mode:** Lombardi for SharePoint supports integrated authentication by default. The authentication mode is configured for each site template and the sample Lombardi Portal during installation, based on the authentication mode selected during the installation process. You can configure each web part to use either integrated or basic authentication. Click **Edit Mode**, then select the authentication mode for each page. If you select basic authentication, you must specify the authentication credentials for the Lombardi server, including username and password.

Lombardi Embedded Web Site web part

Use the Lombardi Embedded Web Site web part to display a Lombardi report or Coach within a Microsoft® SharePoint site. You can also display other types of web sites in the Lombardi Embedded Web Site web part by providing a valid URL.

Configure the Lombardi Embedded Web Site web part as follows:

- **Lombardi Server Base URL:** In the Lombardi Embedded Web Site web part properties window, you must specify the name of the connected Lombardi server. Specify the name of the connected Lombardi server in the following format: `http://<server_name>:<port>`. For example, `http://servername:19086`, or you can specify the URL of another connected web site.
- **Redirect URL Template:** Specify a template to use when building the embedded web site. This template determines what Lombardi information is displayed in the Lombardi Embedded Web Site web part during runtime. There are two template types, Template A or Template B, that you can specify in the **Redirect URL Template** field. Each template can be used with either basic authentication mode or integrated authentication mode, but the syntax for each template differs according to the authentication mode. The following table describes the syntax of the redirect template for the two authentication modes.

Redirect templates for basic or integrated authentication modes

Authentication Mode	Redirect URL Template A	Redirect URL Template B
Basic	<code>{0}/portal/redirect-login.jsp?j_username={1}&j_password={2}&j_forward={3}</code>	<code>{0}/teamworks/redirect-login.jsp?j_username={1}&j_password={2}&j_forward={3}</code>
Integrated	<code>{0}/portal/{3}</code>	<code>{0}/teamworks/{3}</code>

- **Relative Redirect URL:** This field specifies the type of data to display, for example saved searches, ScoreBoards, reports, or Coaches, in the context of the specified redirect URL template. You can use the following table to determine which data types are compatible with each redirect URL template, either Template A or Template B.

Relative redirect URL for each display type and template

Display Type	Relative Redirect URL with Template A	Relative Redirect URL with Template B
Saved search (Inbox)	<code>jsp/getSavedSearch.do</code>	
Saved search (History) (search=X)	<code>jsp/getSavedSearch.do? startsWith=0&search=X</code> <code>jsp/getSavedSearch.do?search=X</code>	
ScoreBoard (id=X)	<code>jsp/viewScoreboard.do?id=X</code>	
Report (ReportId=X)		<code>reportDetails.lsw?zPageId=51 &zReportId=X</code> <code>reportDetails.lsw?zReportId=X</code>
Coach (TaskId=tX)		<code>process.lsw?zWorkflowState=1 &zTaskId=tX</code>

Example: Integrated authentication mode is selected in the Lombardi Embedded Web Site web part properties. To use Redirect Template A with integrated authentication mode, the value `{0}/portal/{3}` is entered in the **Redirect URL Template** field. To display the saved search inbox in the Lombardi Embedded Web Site web part, the value `jsp/getSavedSearch.do` is entered in the **Relative Redirect URL** field. The result of these settings is that the saved search inbox is displayed in the Lombardi Embedded Web Site web part at runtime.



When entering the **Relative Redirect URL** field value for saved searches (history), ScoreBoards, reports, and Coaches, you must specify the ID number of the item you want to display. To determine the ID number of an item in Lombardi Process Portal, hover over the item. The ID number appears in the status bar at the bottom of the web browser window.

- **Authentication Mode:** Lombardi for SharePoint supports integrated authentication by default. The authentication mode is configured for each site template and the sample Lombardi Portal during installation, based on the authentication mode selected during the installation process. You can configure each web part to use either integrated or basic authentication. Click **Edit Mode**, then select the authentication mode for each page. If you select basic authentication, you must specify the authentication credentials for the Lombardi server, including username and password.

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