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## ABSTRACT

Web Content Publisher (WCP) uses Lotus Workflow (LWF) for routing Web content management tasks. LWF can be configured to use the e-mail capabilities of Domino Notes. This paper describes how to automatically notify a user about new activities and how to automatically notify a user about overdue tasks.

## **ITIRC KEYWORDS**

- Web Content Publisher
- E-mail notification
- Lotus Workflow

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# INTRODUCTION

Web Content Publisher (WCP) uses Lotus Workflow (LWF) for routing Web content management tasks. LWF can be configured to use the e-mail capabilities of Domino Notes. The steps below describe how to configure LWF to automatically notify a user about new activities and how to automatically notify a user about overdue tasks. The steps include:

- Starting Lotus Workflow Architect
- Opening a database to access a workflow process
- Configuring a Lotus Workflow Process for notification of new activities
- Testing notification of new activities
- Configuring notification of overdue tasks

## STARTING LOTUS WORKFLOW ARCHITECT

Lotus Workflow Architect is a Windows GUI tool that ships with Lotus Workflow. Start Architect from the Windows Start menu. If a login window is displayed, enter the password of the WCP Admin ID. If this window shows a user that does not have workflow administration privileges (e.g. greg, rob), switch the user id using the Domino Administrator client's **Tools->Switch ID** menu choice and repeat these steps.

Lotus Notes	×
A password is required to access ID file C:\Lotus\Notes\Data\wcpadmin.id Enter the password (case sensitive):	OK Cancel

Figure 1. Lotus Workflow Architect Login window

## **OPENING THE DATABASE TO ACCESS A WORKFLOW PROCESS**

To access a workflow process you need to open a database. To do open a database, from the toolbar select **File->Open databases**. If you are using the default databases that WCP created during the installation, you should see the following window:

Data Sources	×
P       Delete         New       Name       Delete         Data Source type: <ul> <li>Design Repository</li> <li>Application database</li> <li>Process Definition database</li> <li>Notes Organization Directory</li> </ul>	Server:       Server:         gtm/raleigh.ibm.com         File:         Design_Repository_1.nsf         Title:         LWF Design Repository R3.0
Add <u>R</u> emove	Browse
	OK Cancel <u>H</u> elp

Figure 2. Opening database to access a workflow process

At this point, you may be prompted to log in. If this is the case, enter your password so you can open the database.

# **CONFIGURING A LOTUS WORKFLOW PROCESS FOR NOTIFICATION OF NEW ACTIVITIES**

One of the capabilities that LWF provides is the ability to automatically e-mail a member of your Web content team when an activity is routed to his or her role. In order to enable this function, you will need to configure a LWF process.

The steps listed below show you how to configure a LWF process. This example specifically shows you how to configure the Simple Change Process, however you can use these steps to configure and LWF process.

Step 1. Open a LWF process.

- a. From the toolbar select File->Open Process.
- b. Select the **Simple Change Process** (or other process you want to modify) and click **Open**.

Open Process	X
Name: Simple Change Process	<u>O</u> pen
	Cancel
Simple Change Process	Versions >>
<ul> <li>Simpler Change Process (no start task approval rec</li> <li>Simplest Change Process (no approval required)</li> </ul>	<u>H</u> elp
Description:	
Implement the simple change process for WCM	

Figure 3. Selecting the Simple Change Process

Step 2. Select the activity for which you want to trigger e-mail.

- a. Right-click **Review Request** (or other activity you wish to modify) and select **Basic Properties**.
- b. Check the **Notification** check box.
- c. Click **OK** and save the process using **File->Save Process**.

Basic Activity Properties		x
Name: Review Request	OK Cancel Help	
Owner Tasks Decision Forms	: Timing Description	_
Notification Also notify about new activities by mail	Activity owner Include Select	
	Exclude Select	

Figure 4. Selecting an activity

## Step 3. Activate the LWF process.

- a. From the toolbar, select File->Activate Process.
- b. Click **OK**. A warning dialog is displayed.
- c. Click Yes (on the warning dialog).

Activate Process to				<u>?</u> ×
Process Definition database	<u> </u>		Cancel	<u>H</u> elp
LWF Process Definition R3.0				Browse
Process_Definition_1.nsf		On	gtm/raleigh	. IDM. COM
			<u>A</u> dd to (	current profile

Figure 5. Activating the process

Lotus Wo	rkflow Architect 🔀				
There is an active process named "Simple Change Proc in this Process Definition database. Do you want to freeze it and activate the new version					
	<u>Y</u> es <u>N</u> o				

Figure 6. Warning dialog

## Step 4. Update the process cache.

- a. Start your Lotus Notes client and login as WCP Admin.
- b. Open the LWF Application Database.
- c. On the left frame, select Administration ->Cache.
- d. On the top frame, select Update Process Cache. A warning dialog is displayed.
- e. Click **OK** (on the warning dialog).

Lotus Workflow	×
Some of your changes may not take effect until you close and reopen this d	atabase.
OK.	

Figure 7. Warning dialog

Step 5. Close and reopen the database to activate the changes you just made.

From now on, whenever a Review Change activity is created, e-mail will be sent to users in the role assigned to that activity. In this example, anyone assigned to the role of Project Lead will receive e-mail.

## **TESTING NOTIFICATION OF NEW ACTIVITIES**

To test the changes you have just made, complete the following steps.

Step 1. Create a new job using the WCP UI and choose the Simple Change Process.

For instructions on starting WCP and creating a new job, refer to the *Web Content Publisher Help System*.

🚰 Initiate New Job - greg - Microsoft Internet Explorer	
Initiate New Job - greg	
Name of the Job:	
Job1	*
Job description:	
This is a test	<b>A</b>
	-
	_
Process for new Job:	
Simple Change Process	<b>-</b>
Project:	
WCMSample	•
Edition:	
base	<b>•</b>
Priority: 2. Medium	
Start	Cancel

Figure 8. Creating a new Job

Administration 😡 Robe	ert Will - Inbox 🞽 1) New Memo 🕘 Reply 3 Forward	l 4 Delete	administrat
		Size 👻	Subject
🖄 Inbox	WCM Administrator 03/06/2002	1,635	Mail notification for database: LWF Application R3.0
🥩 Drafts	WCM Administrator 03/11/2002	1,635	Mail notification for database: LWF Application R3.0
📨 Sent	WCM Administrator 03/17/2002	1,635	Mail notification for database: LWF Application R3.0
i All Documents 🗇 Trash	Gregory Melahn 03/19/2002	851	New activity 'Review Change ' from the job 'JobX' ( 'Simpler Change Process ( start task approval required) ')
Discussion Threads	Gregory Melahn 03/20/2002	817	New activity 'Review Change ' from the job ' Job4Z ' ( 'Simple Change Process
🗀 Rules 🎞 Stationery	Gregory Melahn 03/20/2002	851	New activity 'Review Change ' from the job ' 0320 ' ( ' Simpler Change Process (i start task approval required) ' )
	Gregory Melahn 03/20/2002	852	New activity 'Review Change 'from the job ' 0320a ' ( 'Simpler Change Process (no start task approval required) ' )
	Gregory Melahn 03/20/2002	852	New activity 'Review Change ' from the job ' 0320c ' ( 'Simpler Change Process (no start task approval required) ' )
	Gregory Melahn 03/20/2002	852	New activity 'Review Change 'from the job ' 0320d ' ( 'Simpler Change Process (no start task approval required) ' )
	WCM Administrator 03/22/2002	1,121	Mail notification for database: LWF Application R3.0
	WCM Administrator 03/27/2002	1,121	Mail notification for database: LWF Application R3.0
- Vidor	WCM Administrator 04/02/2002	1,121	Mail notification for database: LWF Application R3.0
A DIA TO THE REAL	WCM Administrator 04/07/2002	1,121	Mail notification for database: LWF Application R3.0
The Sector and	WCM Administrator 04/12/2002	1,121	Mail notification for database: LWF Application R3.0
all F. D. A. P. D.	WCM Administrator 04/17/2002	1,121	Mail notification for database: LWF Application R3.0
	Gregory Melahn 04/20/2002	817	New activity 'Review Change ' from the job 'Job4Y' ( 'Simple Change Process '
India	Gregory Melahn 04/20/2002	849	New activity 'Review Request 'from the job 'Modify Product Description of WASMan '( 'Simple Change Process ')
1.	Dave Wendt 04/20/2002	810	New activity 'Review Change ' from the job ' $ imes$ ' ( ' Simple Change Process ' ) .
	WCM Administrator 04/24/2002	1,121	Mail notification for database: LWF Application R3.0
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Gregory Melahn 04/24/2002	821	New activity 'Review Request ' from the job ' jkjaslkd ' ( ' Simple Change Process
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	WCM Administrator 04/29/2002	1,121	Mail notification for database: LWF Application R3.0
2 A Star	WCM Administrator 05/06/2002	1,121	Mail notification for database: LWF Application R3.0
States &	WCM Administrator 05/13/2002	1,121	Mail notification for database: LWF Application R3.0
A CANNER (S	WCM Administrator 05/20/2002	1,121	Mail notification for database: LWF Application R3.0
10 10 10 10 10 10 10 10 10 10 10 10 10 1	WCM Administrator 05/28/2002	1,121	Mail notification for database: LWF Application R3.0
1 22 1 23	WCM Administrator 06/06/2002	1,121	Mail notification for database: LWF Application R3.0
	<ul> <li>Gregory Melahn 06/11/2002</li> </ul>	835	New activity 'Review Request ' from the job 'Review Proposed Change ' ( 'Simp Change Process ')

Step 2. Open your Notes client's inbox to see the notification.

Figure 9. Notes inbox

Step 3. Open the new note to view the contents.

**Note**: The URL that appears in your note will not work. If you click the link, you will receive a 404 error. Please check the support pages for additional information regarding the fix for this problem.

	ew activity ' Review Request ' from the job ' Review Proposed Change ' ( ' Simple Change Process ' ) - Domino Administrator Edit View Greate Actions Link Help	Kol
<u> </u>		administrator
B	1 New Memo 2 Reply 3 Forward 4 Delete 5 Folder 6 Copy into 7 Tools	
Â	Gregory Melahn To: Robert Will/raleigh.ibm.com@raleigh.ibm.com	人自
2	06/11/2002 10:20 AM cc: Subject New activity ' Review Request ' from the job ' Review Proposed Change ' ( ' Simple Change F	200000 1
	Hello,	
	A new activity has arrived for you to claim. Please look in the My Activities view in the 'LWF Application R3.0' database.	
	You will find the corresponding binder here:	
	Main document: DRL: <u>http:////OSA/669665B937AF0F8C85256BD5004EC6DE?OpenDocumen</u>	t
		<b>_</b>
	O unread document(s) remaining	^ 🗝 Office 🔹 ^ 🧇 *

Figure 10. E-mail contents in Lotus Notes

## **CONFIGURING NOTIFICATION OF OVERDUE TASKS**

Another capability of Lotus Notes is to notify users when tasks are overdue. To configure this capability, complete the following steps:

**Step 1.** Start Lotus Workflow Architect and open the **Simple Change Process** (or other process you want to modify).

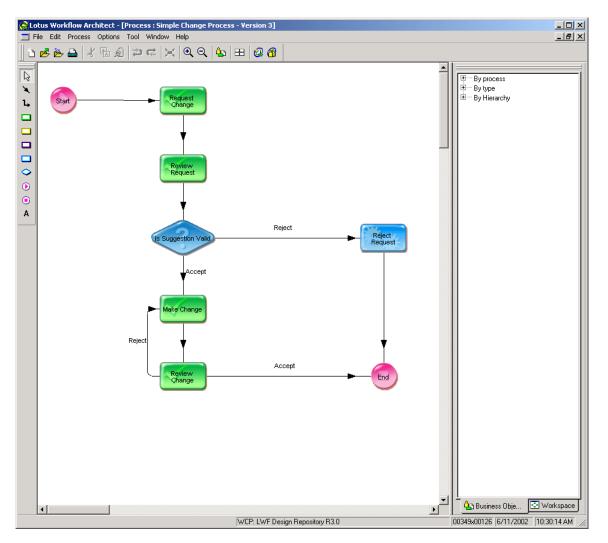


Figure 11. Simple Change Process flowchart

Step 2. From the toolbar, select **Process->Basic Properties**.

Basic Pro	ocess Properties				×
<u>N</u> ame:	Simple Change Process	ок	Cancel	Help	
Owner	Initiators Forms Timing Version Descript	tion			
	E <u>x</u> clude Select				

Figure 12. Basic Properties dialog

Step 3. Modify settings in the Basic Process Properties dialog.

a. Select the **Timing** tab and check the **Process duration** check box.

Basic Pro	cess Properties					X
<u>N</u> ame:	Simple Change Pr	DCESS	ОК	Car		Help
Owner	Initiators Forms	Timing Vers	ion Description			
P P	rocess duration	0	work day(s)	•		
Notil	fy about					
	Ov <u>e</u> rdue process					
	First notification		work day(s)	before /	after duedate	
	<u>R</u> epeat every	1 ×	work day(s)	Y		

Figure 13. Timing and process duration

b. Check the **Overdue process** check box and set the time that notifies the Job owner when the Job is overdue. Note that you can select negative values for the first notification to send e-mail when the process is nearly due.

Basic Process Properties	x
Name: Simple Change Process OK Cancel Help	
Owner Initiators Forms Timing Version Description	1
Process duration 1 📑 work day(s)	
Notify about	
Eirst notification 1 📑 work day(s) 💌 before / after duedate	
Repeat every 1 work day(s)	

Figure 14. Setting the Overdue process

Step 4. Save the process.

Step 5. Activate the LWF process.

- a. From the toolbar, select **File->Activate Process**.
- b. Click **OK**. A warning dialog is displayed.
- c Click Yes (on the warning dialog).

Activate Process to	<u>?</u> ×
Process Definition database LWF Process Definition R3.0 Process_Definition_1.nsf	OK Cancel <u>H</u> elp <u>B</u> rowse On gtm/raleigh.ibm.com
	Add to current profile

Figure 15. Activating the process

Lotus Wo	rkflow Architect 🔀				
	There is an active process named "Simple Change Process" in this Process Definition database. Do you want to freeze it and activate the new version ?				
	<u>Y</u> es <u>N</u> o				

Figure 16. Warning dialog

After saving and activating the process, when a Job is overdue the owner of the Job will receive an e-mail similar to image below.

**Note**: The URL that appears in your note will not work. If you click the link, you will receive a 404 error. Please check the support pages for additional information regarding the fix for this problem.

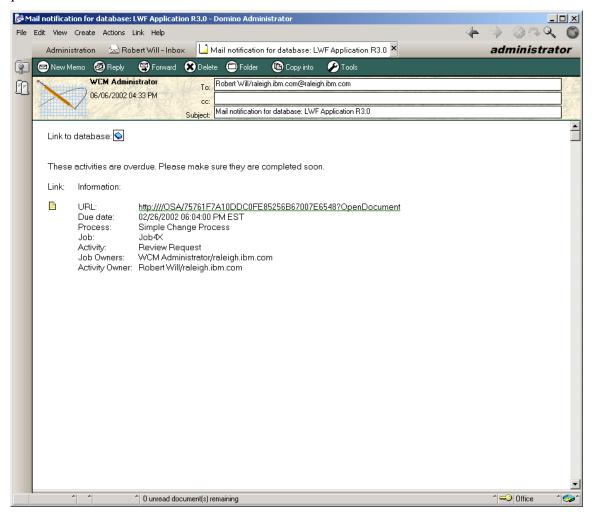


Figure 17. E-mail notification for an overdue Job

**Note**: You can do use the same notification feature on an activity level instead of a Job level by selecting the **Basic Properties** on an Activity instead of a Job.

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