



Combining IBM Lotus Forms with WebSphere Process Server and WebSphere Portal to Enable Business Process Automation



Abstract



Looking for a quick, repeatable, auditable way to handle human tasks within automated processes? WebSphere Process Server process automation capabilities can be enhanced by using Lotus Forms to handle human tasks in a WebSphere Portal environment.

Learn how Lotus Forms capabilities can be used to deliver secure, intuitive, wizard-driven human task interaction with automated processes via a WebSphere Portal user interface.

Learn how WebSphere Process Server and Lotus Forms can interact and how to integrate form data into the business process.

Also learn how Process Server business rules can drive forms and how IBM ECM platforms can be used to audit the user interaction. Open Logic include real world examples where Lotus Forms, WebSphere Process Server and WebSphere Portal have improved efficiencies and reduced costs for medium and large customer organizations in various industries. They will show sample integrated Forms/Process Server/Portal applications and discuss future directions.

Agenda

- Open Logic Introduction
- Elements of a Process Portal
- Cardiff University Case Study
- Summary
- Questions

Who are Open Logic?



IBM. **WebSphere.** software

IBM. **Lotus.** software

IBM. **DB2.** Information Management Software

IBM. **Rational.** software

IBM. **Tivoli.** software



A little bit of process history...



1st Wave: Taylorism

- Frederick Taylor's "Scientific Management" theory
- Division of labour
- Managerial control of the workplace
- Cost accounting based on systematic time-and-motion study



2nd Wave: Business Process Reengineering

- Processes manually re-engineered (typically a one time event)
- Processes implemented via ERP software
- Business & process logic hard-coded
- Led to EAI (application to application focused)

"The ability to change is far more prized than the ability to create in the first place."

Business Process Management - The Third Wave
Howard Smith & Peteringar

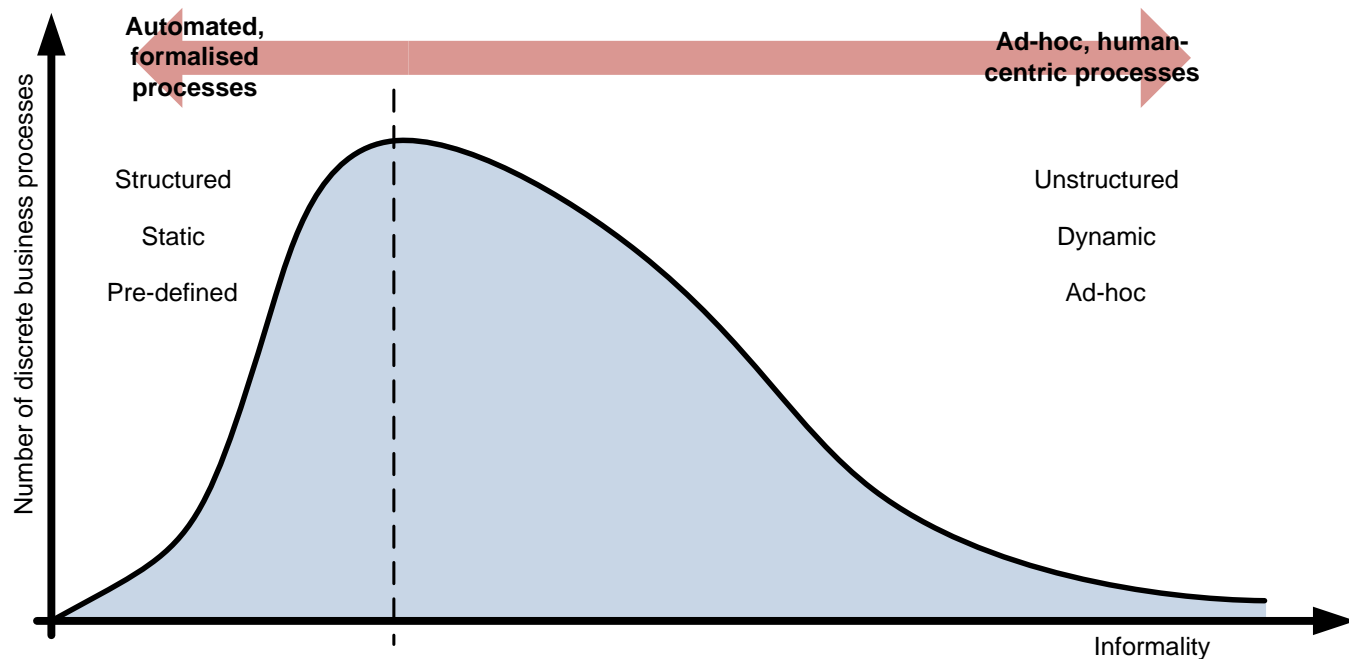
3rd Wave: Business Process Management

- Facilitating the ability to change
- Extract business processes from the applications which run them

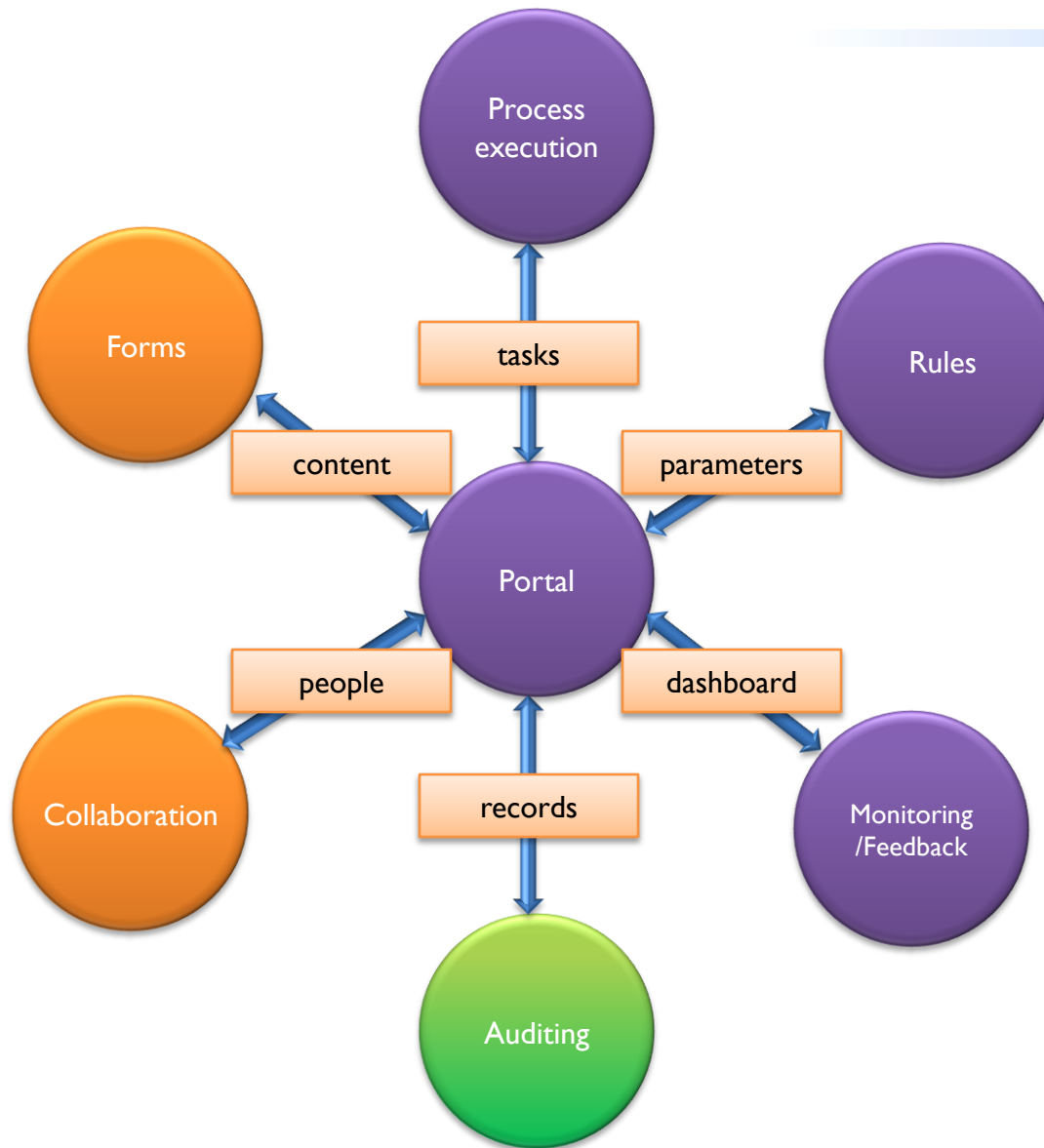
Extending the frontiers of process automation



“Historically, approaches to process automation only handled structured, formal processes. These left many of the activities that people do day-to-day without any software support.”

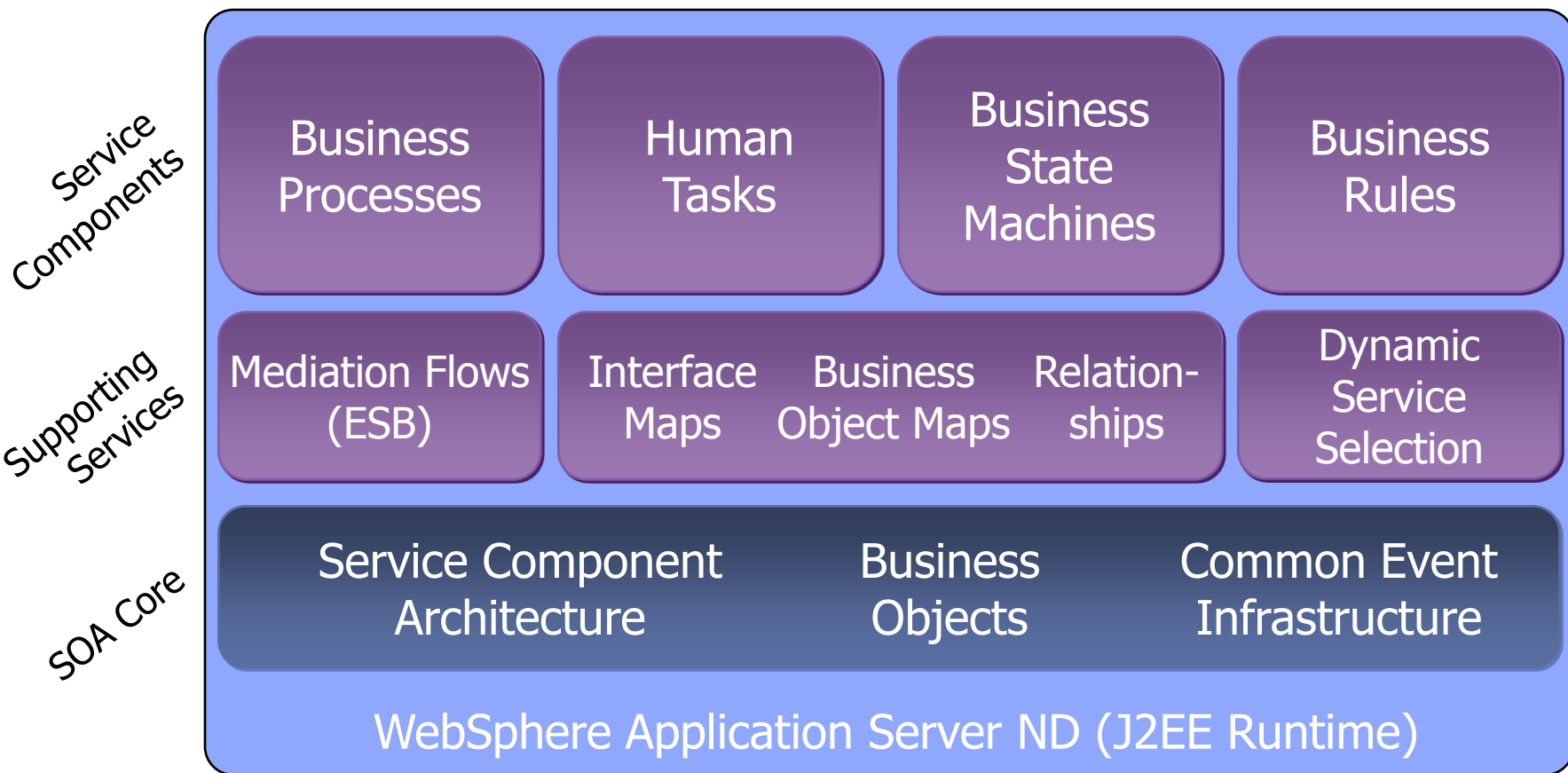


When we think about business process automation – what elements might we expect to see?

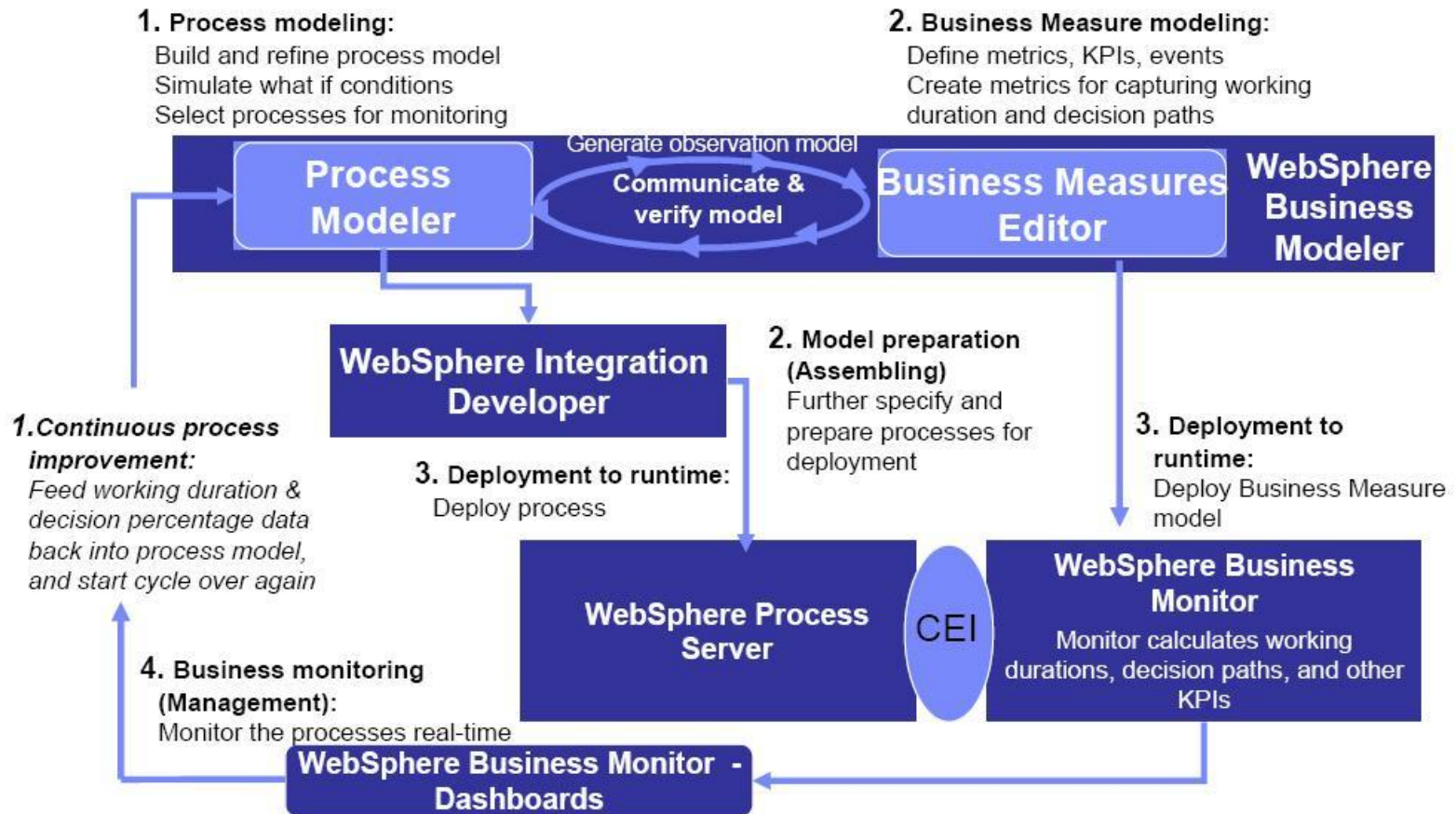




WebSphere Process Server

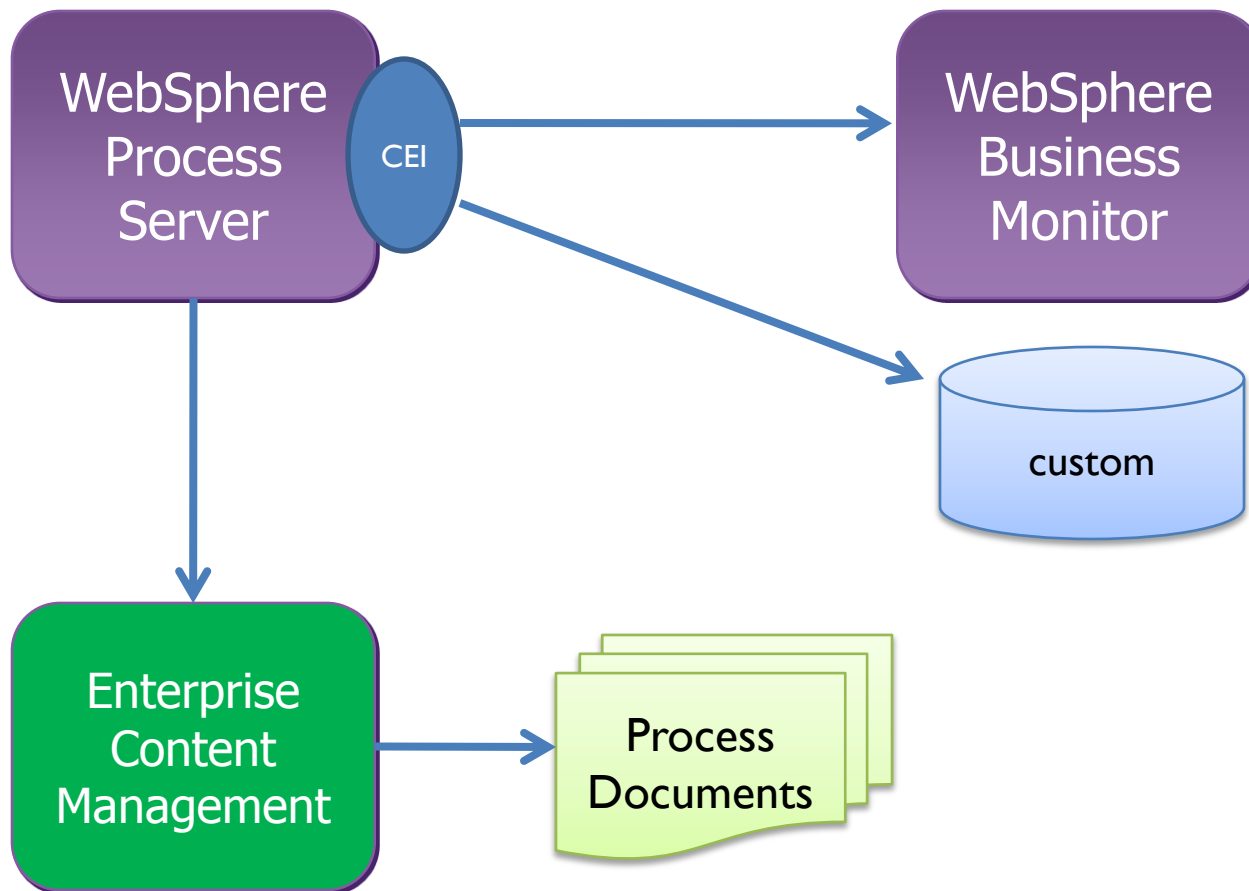


How do you monitor automated business processes?



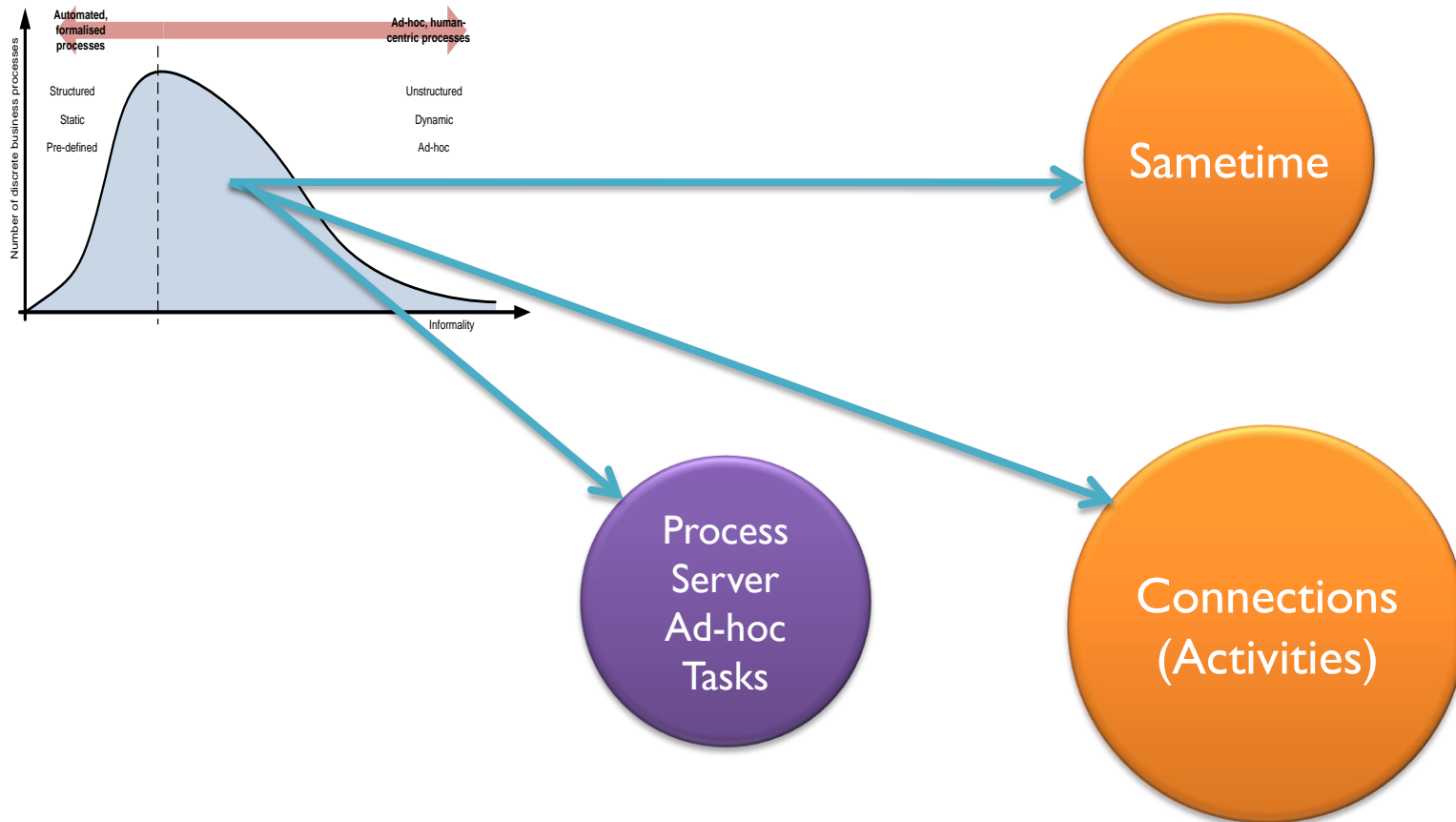


How do you audit automated business processes?



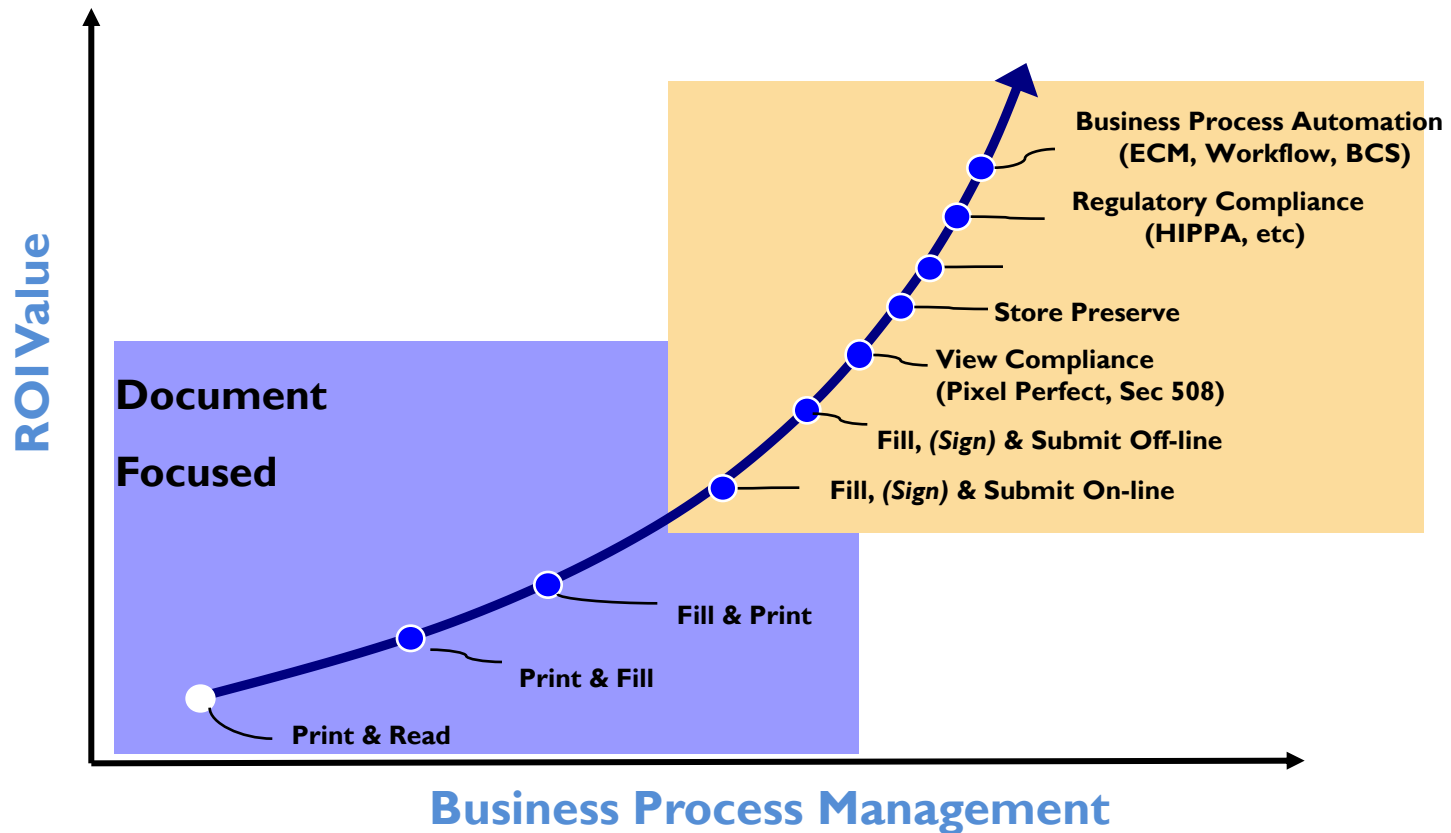


Collaboration tools enhance formal and informal tasks





Automating business processes increases the value of e-forms



Forms

Why e-forms and automated business processes work well together



Mountain-Sure INVESTMENTS Brokerage Account Application

INVESTMENTS Check Writing Account? Yes ☐ No ☐ Portfolio Account? Yes ☐ No ☐

Account Type Check one ☐ Solicited ☒ Unsolicited Office: CA-32 AEP: 9999 Account#: 88888

☒ Individual ☐ Estate* ☐ Partnership* ☐ Custodian for a Minor ☐ Collateral ☐ Joint Tenants ☐ Trust* ☐ Corporation* ☐ Charitable Organization* ☐ Investment Club *Additional Documents Required

Applicant Information Required by MSRB Rule 0-2(a)(9) and NASD Rule 2210

First Name: Richard Last Name: Smith SSN: 999-99-9999 Date of Birth: 04-15-1964 Business Phone: () -
Mailing Address: 123 Electric Form Ave City: Springfield State: MA ZIP Code: 01111
Legal Street Address (Required in additional P.O. Box): 123 Electric Form Ave City: Springfield State: MA ZIP Code: 01111
Employer: PureEdge Solutions Occupation: Doctor City: Springfield State: MA
Are you or joint applicant employed by a member firm of a stock exchange, a municipal dealer or other securities firm?
☐ Yes, Co. ☐ No

Financial

[Application for Estate, Partnership, Trust, Corp. or Charity]

User: []
Signature: []
Signature: []

Signatures

`</name>`
`</city>`
`</legalAddress>`
`</address>`
`</employer>`
`</applicant>`
`<occupation>Doctor</occupation>`

Bylaws of the American Institute of Organbuilders
as amended October 10, 2001

Article I
Name
The name of this organization shall be: American Institute of Organbuilders (AIO).

Article II
Objectives
The objectives of this organization shall be: to advance the science and practice of research, experiment and other means; to disseminate knowledge regarding pipe organs; to establish an organized training program; to publish and exchange of information; to establish an organized training program; to publish and exchange of information; to establish an organized training program.

EUROPEAN DEPARTMENT OF HEALTH
CERTIFICATE OF LIVE BIRTH

□ Presentation Layer

- ▶ Pixel-perfect for duplicating paper forms
- ▶ Guided-interview, or wizard, driven

□ Business Logic

- ▶ Capture forms processes in the form
- ▶ Integrate business process workflows

□ Data Instances

- ▶ Based on W3C XForms specification
- ▶ Multiple XML payloads for integration
- ▶ Validate against external XML Schemas

□ File Attachments

- ▶ Capture complete transaction
- ▶ Supplemental or associated e-forms
- ▶ MS Office, videos, faxes, etc



The role of a Portal in Process Automation



“Collaborative Process Portals are an excellent platform to unify support for formal and informal business processes.”

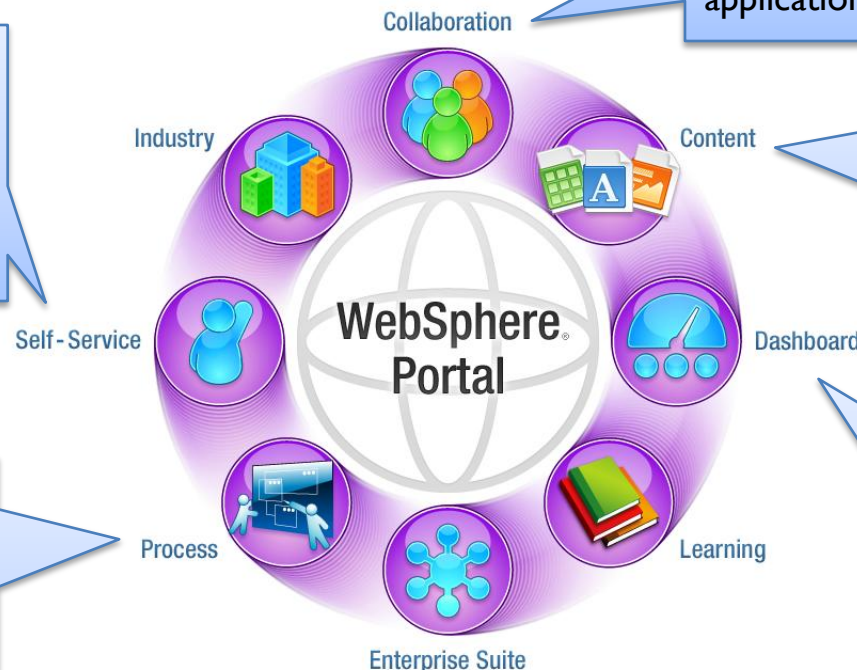
“I need my teams to work together more effectively and efficiently, while easily accessing relevant corporate applications”

“I need to deliver low touch or no touch processing of transactions – to customers, partners, or employees.”

“I need to increase the value of my website by delivering real-time, personalized data based on user attributes”

“I need to track my organization's goals and performance against them to more effectively drive results”

“I need to deliver business processes to users in context with the information, applications, and data that they need to make decisions.”





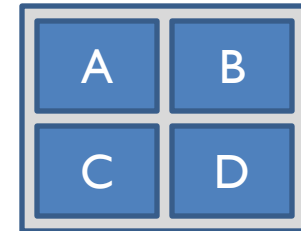
Remember: a portal is ...



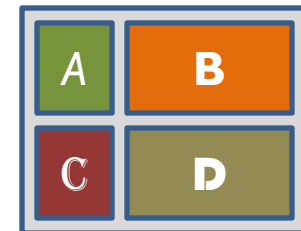
- **C**ustomized



Credentials



- **P**ersonalized



- **A**daptive



12/10/2008



13:05



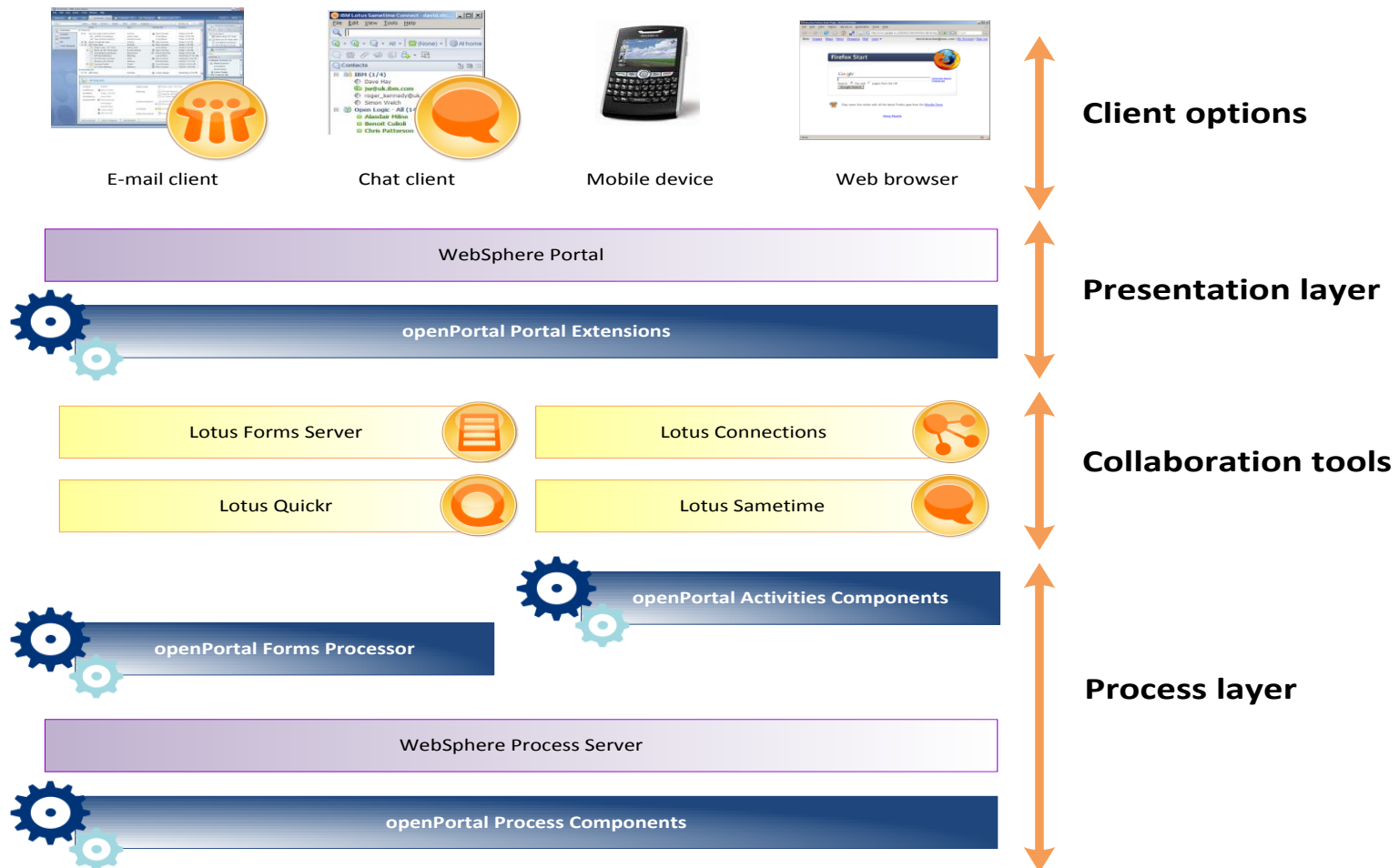
- **D**esktop



Components of a Process Portal



Implementing a unified Process Portal requires the integration of several complex technologies

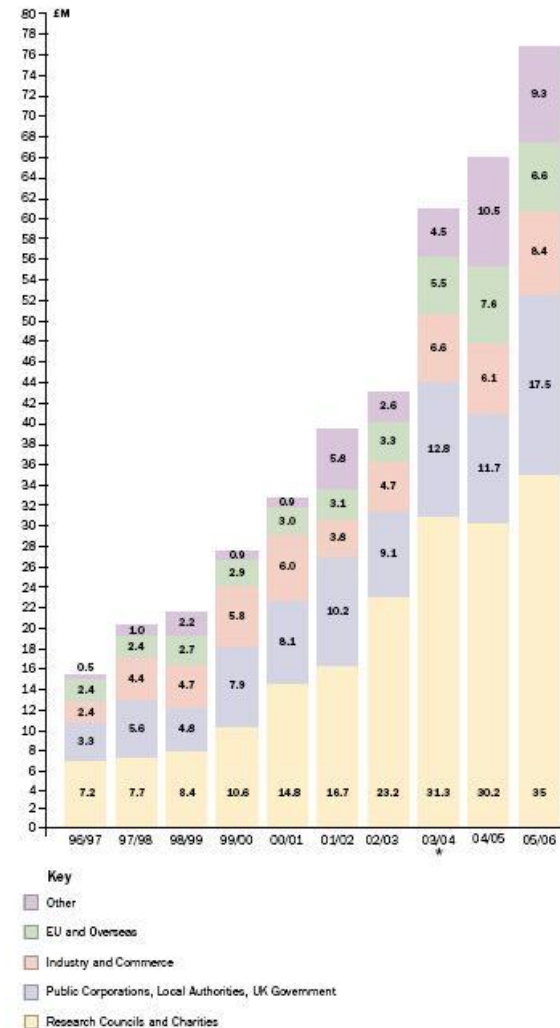


Cardiff University Case Study

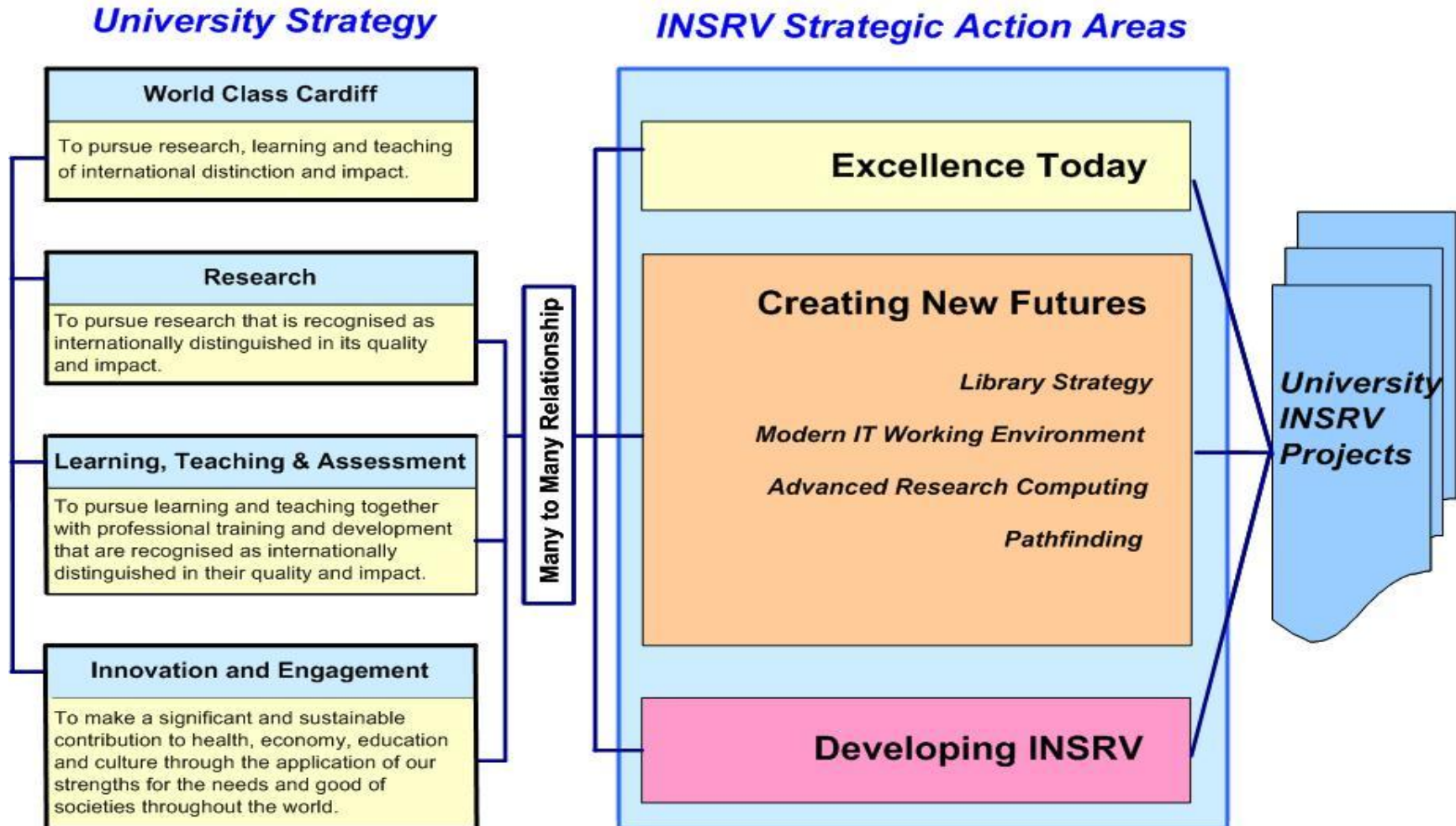
“Adding Process capabilities to the MWE.”



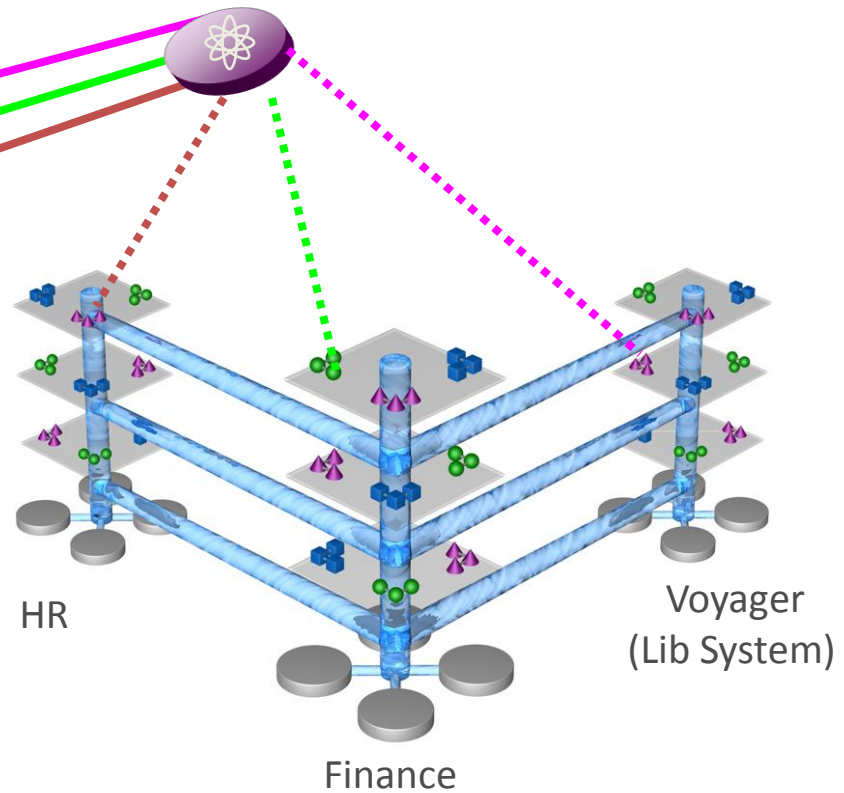
- Founded in 1883
- 26000 students, 5000 staff
- 141st World Ranking
- Top 100 for Biomedicine and Humanities
- 7th in RAE



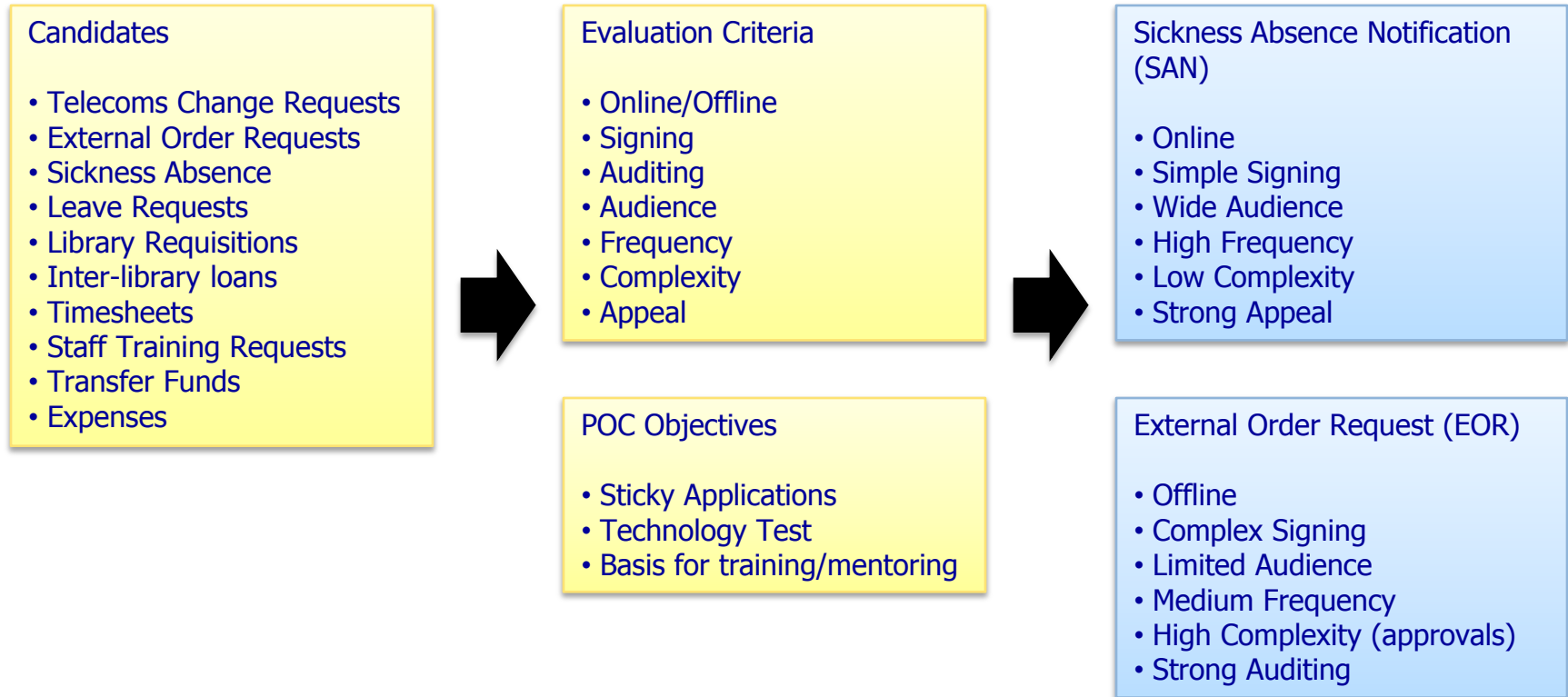
Cardiff and the MWE



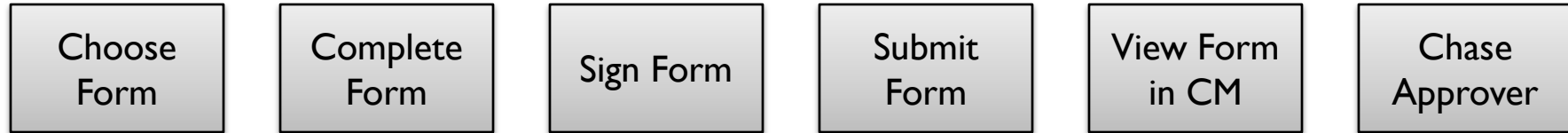
... to this



Cardiff University Process Portal POC



Scenario #1 – End User Submits EOR Form



DisplayFormPortlet

External Order Request (EOR) Form

Submit an external order

External Order Request (EOR) Form

Supplier Details

Supplier Name: No.

Address:

Order Details

Order Date: Subject:

Quantity	Description	Unit	Unit Cost (\$)	Total Cost (\$)	Unit Cost (\$)	Total Cost (\$)
1	ITEM		5.00	5.00	5.00	5.00

Total Cost (\$):






Comments:

Process

Once submitted, External Order Requests flow through an approval process, based on the order value and the Budget Holder's school. If all the necessary approvals are obtained, the order is processed by the school finance department and sent through to the supplier for fulfilment.

[Get Started Now](#)

Other Forms

-  **Goods-In (GI) Form**
Submit a goods-in form
-  **Supplier Non-Conformance (SNC) Form**
Submit a supplier non-conformance form
-  **Approved Supplier Request (ASR) Form**
Submit an approved supplier request form
-  **Sickness Absence Notification (SAN) Form**
Notify human resources of any time off due to sickness
-  **Sickness Absence Report (SAR) Form**
Declare an absence for yourself or another employee

IBM WebSphere Portal - Windows Internet Explorer

http://silver.bfs.net:10038/wps/myportal/!ut/p/c1/hy7BD0IwEE5_yHR0oeW6WFukBA

Live Search

Search web...

IBM WebSphere Portal

Rational portlets OpenPortal CM Portlet Welcome Getting Started

Forms

DisplayFormPortlet

External Order Request (EOR) Form

Next Page Cancel

Supplier Details

Supplier Name: Open Logic Tel: 01905 760960

Address: Woodside Perry Wood Walk Worcester Fax: 01905 760960

Contact: Chris Patterson

Order Details

Order Date: 20/11/2007

Cost Centre: EC001

Quantity	Description	VAT	Unit Cost (Ex. VAT)	Total Cost (Ex. VAT)	Total Cost (Inc. VAT)
1	openPortal Briefing Pack	17.5%	25.00	25.00	29.37
1	openPortal Demo CD	17.5%	25.00	25.00	29.37
1	openPortal Video/DVD	17.5%	15.00	15.00	17.62

Total Cost (Ex. VAT): 65.00

Total Cost (Inc. VAT): 76.36

Total VAT: 11.36

Comments:

Inventory

Inventory Item: ☐ Yes ☒ No Delivery To:

Inventory Group: ☒ Computers & Peripherals Location of Equipment:

☐ Network Equipment

☐ Furniture

☐ Misc. Equipment

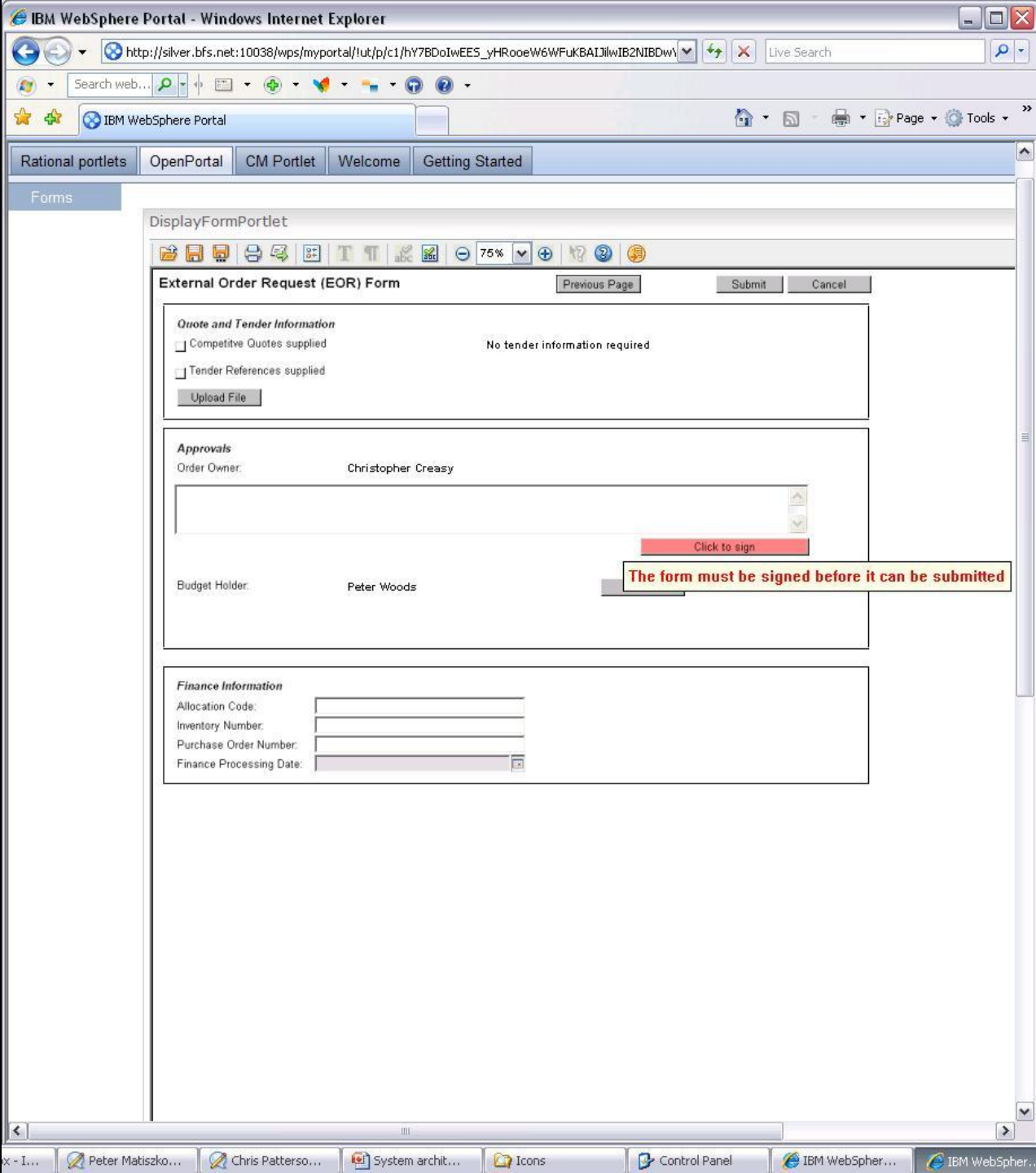
Order Owner

Surname: Creasy ☐ I am the budget holder

Firstnames: Christopher

HR Number:

Directorate: Economy



IBM WebSphere Portal - Windows Internet Explorer

http://silver.bfs.net:10038/wps/myportal/!ut/p/c1/hY7BDoIwEES_yHRooeW6' Live Search

Search web... IBM WebSphere Portal

Rational portlets OpenPortal CM Portlet Welcome Getting Started

Forms

DisplayFormPortlet

External Order Request (EOR) Form Previous Page Submit Cancel

Quote and Tender Information

☐ Competitive Quotes supplied No tender information required

☐ Tender References supplied

Upload File

Approvals

Order Owner: Christopher Creasy

This is required for a presentation to the Process Portal steering group next week. Any authorisation problems, please let me know asap. Chris

This item is digitally signed and cannot be altered

Signed by ccreasy

Budget Holder: Peter Woods Search

Finance Information

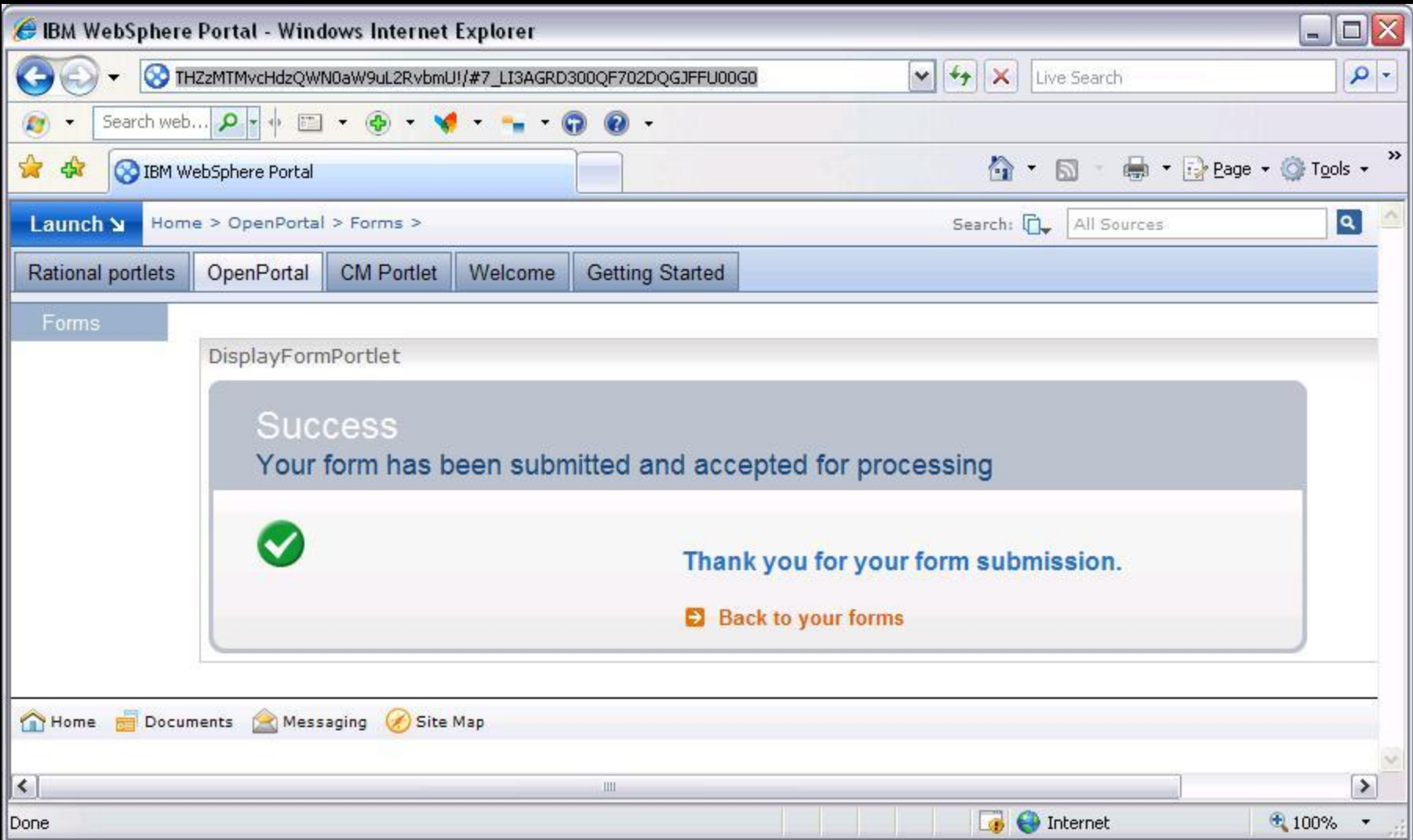
Allocation Code:

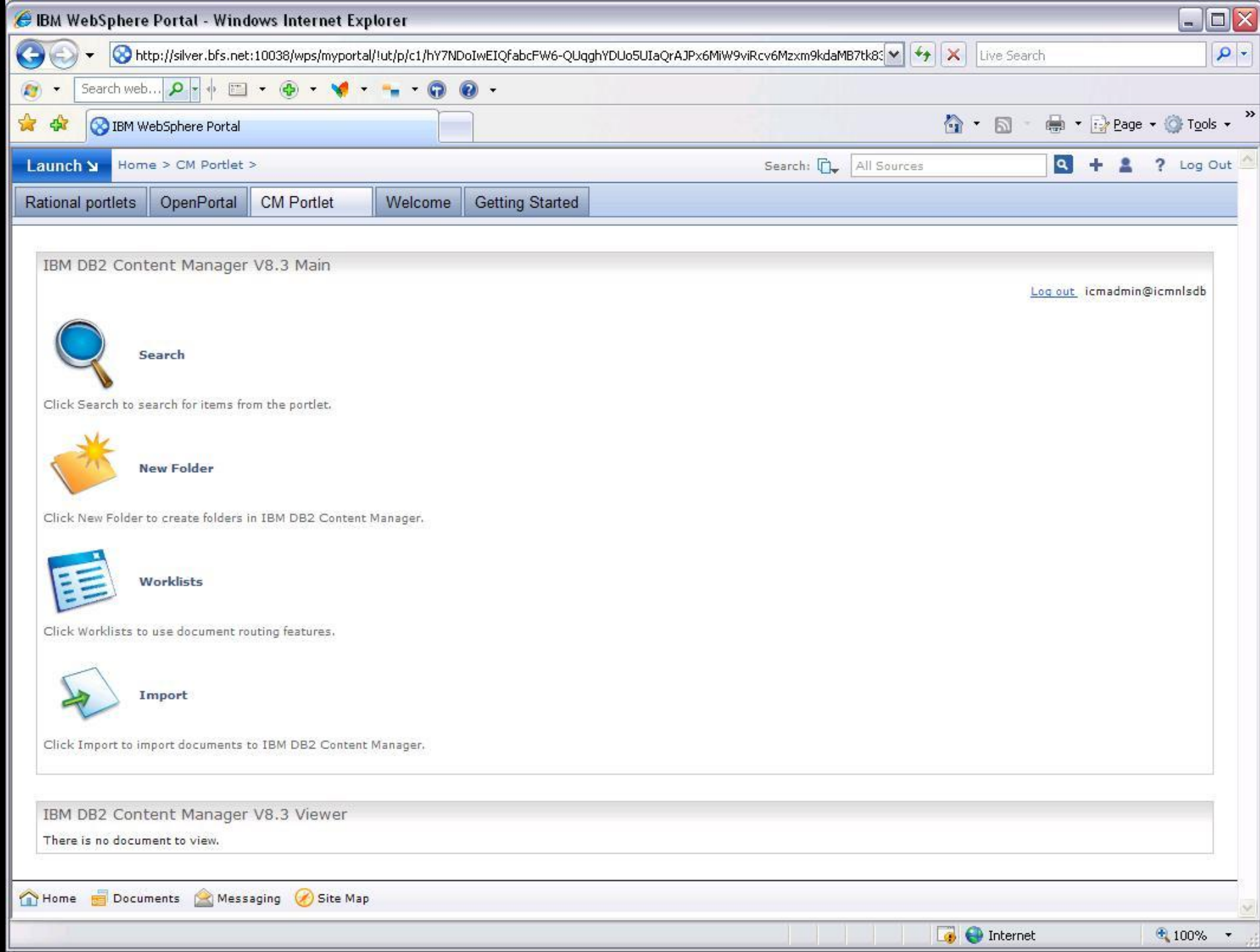
Inventory Number:

Purchase Order Number:

Finance Processing Date:

Internet 100%





IBM DB2 Content Manager V8.3 Main

[Home](#) > [Item Type List](#) > [Search in EORForm](#)[Log out](#) icmadmin@icmnlsdb

EORForm

- FormId: (*,?)
- Value:
- School: (*,?)
- Timestamp: (YYYY-MM-DD-hh.mm.ss.xxxxxxx)
- Order owner: (*,?)
- Order date: (YYYY-MM-DD)
- Order comments: (*,?)

☒ All of these words ☐ Any of these words

IBM DB2 Content Manager V8.3 Viewer

There is no document to view.

IBM WebSphere Portal - Windows Internet Explorer

http://silver.bfs.net:10038/wps/myportal/lut/p/c1/hY7ND0IwEIQfabcfW6-QUqghYDU05UIaQrAJpX6MIW9vIRcv6Mzxm9kdaM

Search web...

IBM WebSphere Portal

Launch Home > CM Portlet > Search: All Sources Log Out

Rational portlets OpenPortal CM Portlet Welcome Getting Started

IBM DB2 Content Manager V8.3 Main

Home > Item Type List > Search in EORForm > Search Results [Log out](#) icmadmin@icmnl8db

Search Results

EORForm

-- Actions -- -- E-clipboard -- -- Process --

Showing 1-1 of 1 Page 1 of 1 Jump to page:

	FormId	Value	School	Timestamp	Order owner	Order date	Order comments
<input type="checkbox"/>	owner-ccreasy-1195578158744	76.36	Economy	2007-11-20-05.02.38.776000	Christopher Creasy	2007-11-20	

Showing 1-1 of 1 Page 1 of 1 Jump to page:

IBM DB2 Content Manager V8.3 Viewer

owner-ccreasy-1195578158744

75%

External Order Request (EOR) Form

Next Page Cancel

Supplier Details

Supplier Name: Open Logic Tel: 01905 760950

Address: Woodside Perry Wood Walk Worcester Fax: 01905 760960

Contact: Chris Patterson

Order Details

Order Date: 20/11/2007

Cost Centre: EC001

Quantity	Description	VAT	Unit Cost (Ex. VAT)	Total Cost (Ex. VAT)	Total Cost (Inc. VAT)
1	openPortal Briefing Pack	17.5%	25.00	25.00	29.37
1	openPortal Demo CD	17.5%	25.00	25.00	29.37
1	openPortal Video/DVD	17.5%	15.00	15.00	17.62
Total Cost (Ex. VAT):				65.00	
Total Cost (Inc. VAT):				76.36	

Internet 100%

IBM WebSphere Portal - Windows Internet Explorer

http://portal.bfs.net/wps/myportal/!ut/p/c1/jY7LDoIwEEW_xS-Y2xZKXVILLUHfHSiwMSyMkggYY_x-6c6Y-JhZnnNnLjU07dA-...

Search web... IBM WebSphere Portal

Launch Home > openPortal > Inflight > Search: All Sources Log Out

openPortal Welcome Getting Started

Forms
My Tasks
Inflight
Content Management

My Started Processes

This list displays all the processes that you have started and that are not yet complete. Show: All Tasks All Processes

Process	Task Name	Task Description	Priority	Type	Created Date	Due Date	Process Starter
ExternalOrderRequestProcess	UniqueHumanApproval	EOR Approval	5		Jan 18, 2008 12:36:04 PM		ccreasey

Home Messaging Documents Site Map

Internet 100%

IBM WebSphere Portal - Windows Internet Explorer

http://portal.bfs.net/wps/myportal/!ut/p/c1/jY7LDoIwEEW_xS-Y2xZKXVILLUHfHvVgY1gYJREwxvj9ws6Y-JhZnnNnLtU0bt882

Search web... IBM WebSphere Portal

Launch Home > openPortal > Inflight > Search: All Sources Log Out

openPortal Welcome Getting Started

Forms
My Tasks
Inflight
Content Management

My Started Processes

Task Information	Potential Owners
<p>Task: UniqueHumanApproval</p> <p>State: Not claimed</p> <p>Created By: Christopher P. Creasy/bfs</p> <p>Created Date: Fri Jan 18 12:36:04 GMT 2008</p> <p>Process: ExternalOrderRequestProc</p>	<p>Peter L. Woods/bfs</p>

Task Description

EOR Approval

Done

Home Messaging Documents Site Map

http://portal.bfs.net/wps/myportal/!ut/p/c1/jY7LDoIwEEW_xS-Y2xZKXVILLUHfHvVgY1gYJREwxvj9ws6Y-JhZnnNnLtU0bt882INzb4 Internet 100%

I am available to chat. Click for options.

Scenario #2 – Approval

View Tasks

View Task
Detail

Claim Task

Submit
Form

View Form
in CM

IBM WebSphere Portal - Windows Internet Explorer

http://portal.bfs.net/wps/myportal/!ut/p/c1/jY7ND0IwEISfx5FYbUtKOVJLW8KFFxC4GBKJa5Lggfj8lpNeRGdPky8zO9CDv3l4ut

Live Search

Search web...

IBM WebSphere Portal

Home RSS Print Page Tools

Launch

Home > openPortal > My Tasks >

Search: All Sources Log Out

openPortal

Welcome

Getting Started

Forms

My Tasks

Inflight

Content Management




My Tasks

This list displays all the tasks that are currently available for you to work on. Use the buttons at the right of the screen to view task details or to start work on a task.

Claim

Cancel Claim

Show: All Tasks All Processes ExternalOrderRequestProcess

<input type="checkbox"/>	Process	Task Name	Priority	Type	Created Date	Due Date	Process Starter	
<input checked="" type="checkbox"/>	ExternalOrderRequestProcess	UniqueHumanApproval	5		Jan 18, 2008 12:36:04 PM		ccreasy	  

Home

Messaging

Documents

Site Map

Internet

100%

IBM WebSphere Portal - Windows Internet Explorer

http://portal.bfs.net/wps/myportal/!ut/p/c1/jY7NDoIwEISfx5FY7U8KHkmlLeHPgyhwMRyIaSLgweDrW056EZ09Tb7M7EAH_qZ

Search web... IBM WebSphere Portal

Launch Home > openPortal > My Tasks >

Search: All Sources Log Out

openPortal Welcome Getting Started

Forms
My Tasks
Infight
Content Management

My Tasks

[Claim](#) [Work On](#)

Task Information

Task: UniqueHumanApproval
State: Not claimed
Created By: Christopher P. Creasy/bfs
Created Date: Fri Jan 18 12:36:04 GMT 2008
Process: ExternalOrderRequestProcess

Potential Owners

[Peter L. Woods/bfs](#)

Task Description

EOR Approval

[Done](#)

Home Messaging Documents Site Map

http://portal.bfs.net/wps/myportal/!ut/p/c1/jY7NDoIwEISfx5FY7U8KHkmlLeHPgyhwMRyIaSLgweDrW056EZ09Tb7M7EAH_qZ-cdf- Internet 100%

IBM WebSphere Portal - Windows Internet Explorer

http://portal.bfs.net/wps/myportal/!ut/p/c1/jY7LDoIwEEU_aW4rKbIEC4XwcoMiG9NFQ0iwEFONny_s3IjeWd2cnJmhjpax-jn02g2T1SO11

Search web... IBM WebSphere Portal

Launch Home > openPortal > My Tasks > Search: All Sources Log Out

openPortal Welcome Getting Started

Forms
My Tasks
Inflight
Content Management

MyTasksPortlet

Page Size

Number of tasks per page: 10

Due task warning

Display a warning icon next to task 15 minutes before the due date

Display Columns

- ☒ Display Name
- ☒ Description
- ☒ Priority
- ☐ Type
- ☐ Claimed
- ☒ Created Date
- ☐ Process
- ☒ Due Date
- ☒ Process Instance Name
- ☐ Process Instance Description
- ☒ Process Starter
- ☒ Process Start Date
- ☐ Potential Owners

Apply Cancel

Done Internet 100%

▼To-do Task

Name	ExternalOrderProcessingTask1	Display Name	<Not Applicable>
------	------------------------------	--------------	------------------

►Service Interface

▼People Assignment (Receiver)

Potential Owners	Group Members
	GroupName *
	IncludeSubgroups *

▼User Interface

User Interface
Portal Client

▼Escalation



Build Activities

Properties

Problems

Servers

Console

Description

Details

Assign People

Environment

Escalation

Expected task state:	claimed
Escalate after:	<input checked="" type="radio"/> 2 Days 0 Hours 0 Minutes 0 Seconds <input type="radio"/>
Notification type:	E-mail
E-mail message:	DefaultMessage <input type="button" value="Edit..."/> <input type="button" value="Remove"/>
Repeat notification every:	<input checked="" type="radio"/> 0 Days 0 Hours 0 Minutes 0 Seconds <input type="radio"/>
Increase task priority:	No

IBM WebSphere Portal - Windows Internet Explorer

http://silver.bfs.net:10038/wps/myportal/!ut/p/c1/hy7BD0IwEE5_yHR0oeW6WFukBA

Live Search

Search web...

IBM WebSphere Portal

Rational portlets OpenPortal CM Portlet Welcome Getting Started

Forms

DisplayFormPortlet

External Order Request (EOR) Form

Next Page Cancel

Supplier Details

Supplier Name: Open Logic Tel: 01905 760960

Address: Woodside Perry Wood Walk Worcester Fax: 01905 760960

Contact: Chris Patterson

Order Details

Order Date: 20/11/2007

Cost Centre: EC001

Quantity	Description	VAT	Unit Cost (Ex. VAT)	Total Cost (Ex. VAT)	Total Cost (Inc. VAT)
1	openPortal Briefing Pack	17.5%	25.00	25.00	29.37
1	openPortal Demo CD	17.5%	25.00	25.00	29.37
1	openPortal Video/DVD	17.5%	15.00	15.00	17.62

Total Cost (Ex. VAT): 65.00

Total Cost (Inc. VAT): 76.36

Total VAT: 11.36

Comments:

Inventory

Inventory Item: ☐ Yes ☒ No Delivery To:

Inventory Group: ☒ Computers & Peripherals Location of Equipment:

☐ Network Equipment

☐ Furniture

☐ Misc. Equipment

Order Owner

Surname: Creasy ☐ I am the budget holder

Firstnames: Christopher

HR Number:

Directorate: Economy

IBM WebSphere Portal - Windows Internet Explorer

http://portal.bfs.net/wps/myportal/!ut/p/c1/hZBLb4MwEIR_UeWxTfw44hgbBAakPBq4VByiiKpJeoJ6-2topUioTb

Search web... IBM WebSphere Portal

Launch My Tasks > My Tasks > Forms > You have 1 tasks. Search: All Sources

My Tasks

Forms

External Order Request (EOR) Form Previous Page Complete Cancel

Quote and Tender Information

☐ Competitive Quotes supplied Tender information must be provided

☐ Tender References supplied

View/Download

Approvals

Order Owner: Christopher P. Creasy

This is required for a presentation to the Process Portal steering group next week. Any authorisation problems, please let me know asap. Chris

Signed by ccreasy

Budget Holder: Peter L. Woods

☐ This order exceeds my budget

Click to sign

Finance Information

Allocation Code:

Inventory Number:

Purchase Order Number:

Finance Processing Date: 27/02/2008

IBM WebSphere Portal - Windows Internet Explorer

http://silver.bfs.net:10038/wps/myportal/lut/p/c1/hy7ND0IwEIQfabcfW6-QUqghYDU05UIaQrAJPx6MIW9viRcv6Mzxm9kdaM

Search web...

IBM WebSphere Portal

Launch Home > CM Portlet > Search: All Sources Log Out

Rational portlets OpenPortal CM Portlet Welcome Getting Started

IBM DB2 Content Manager V8.3 Main

Home > Item Type List > Search in EORForm > Search Results [Log out](#) icmadmin@icmnl.sdb

Search Results

EORForm

Showing 1-1 of 1

FormId

owner-cceasy-1195578158744

Showing 1-1 of 1

Actions

Value School Timestamp Order owner Order date Order comments

76.36	Economy	2007-11-20-05.02.38.776000	Christopher Creasy	2007-11-20	
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Page 1 of 1 Jump to page:

IBM DB2 Content Manager V8.3 Viewer

owner-cceasy-1195578158744

75%

External Order Request (EOR) Form

Next Page Cancel

Supplier Details

Supplier Name: Open Logic Tel: 01905 760950

Address: Woodside Fax: 01905 760960

Perry Wood Walk

Worcester Contact: Chris Patterson

Order Details

Order Date: 20/11/2007

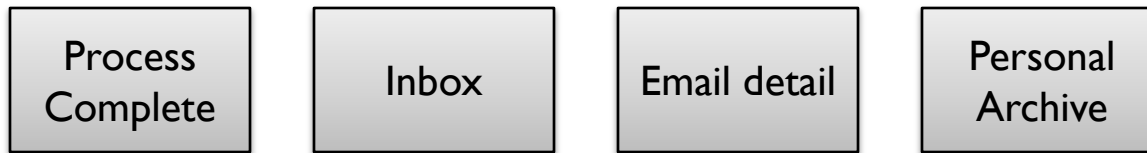
Cost Centre: EC001

Quantity	Description	VAT	Unit Cost (Ex. VAT)	Total Cost (Ex. VAT)	Total Cost (Inc. VAT)
1	openPortal Briefing Pack	17.5%	25.00	25.00	29.37
1	openPortal Demo CD	17.5%	25.00	25.00	29.37
1	openPortal Video/DVD	17.5%	15.00	15.00	17.62

Total Cost (Ex. VAT): 65.00

Total Cost (Inc. VAT): 76.36

Scenario #3 – Approval Emails



IBM WebSphere Portal - Windows Internet Explorer

http://portal.bfs.net/wps/myportal/!ut/p/c1/04_SB8K8xLLM9M5SzPy8xBz9CP0os3hfIzcPb293Qwn3f0czAyMfJzcTMxdvIwN3E_1wkA7ck

Search web... IBM WebSphere Portal








Launch Home > openPortal > Email > You have 1 tasks. Search: All Sources Log Out

openPortal Welcome Getting Started

Forms
My Tasks
Infight
Content Management
Email

Mail

Check for Mail Compose Move to Folder... Delete Manage Folders Find... Actions

	Inbox				Page 1 of 1
	<input type="checkbox"/>	From	Subject	Date	Size
 Inbox	<input type="checkbox"/>	noreply	 External Order Request approved.	2/4/08	203K
 Drafts					
 Sent					
 All Messages					
 Junk Mail					
 Trash Empty					

[Hide Folders](#) Page 1 of 1

Home Messaging Documents Site Map

Internet 100%

IBM WebSphere Portal - Windows Internet Explorer

http://portal.bfs.net/wps/myportal/!ut/p/c1/jY47D4lwFIV_0r291CojDFSRimgURRbTwZAmAg7G3y_dxETPGb-cB3Qwe_Sv Live Search

Search web... IBM WebSphere Portal

Launch Home > openPortal > Email > You have 1 tasks. Search: All Sources Log O

openPortal Welcome Getting Started

Forms
My Tasks
Inflight
Content Management
Email

Mail

[Back to message list](#) | [Previous message](#) | [Next message](#)

Compose Reply Reply to All Forward Move to Folder... Delete Actions

From: noreply@cardiff.ac.uk
To: christopher.creasy@bfs.net
Date: Feb 4, 2008 11:39:57 AM
Subject: External Order Request approved.
Attached: [page1.png](#) [page2.png](#)

The following external order request has been approved.

Order Owner: Christopher P. Creasy (Economics)
Order Value Ex Vat: 3456.0 Inc Vat: 3456.0

Order Items:

1 x	at 3434.0 each (ex. vat).
1 x	at 22.0 each (ex. vat).

Approvals:

Approved by Order Owner: Christopher P. Creasy
Approved by Budget Holder: Peter L. Woods

Internet 100%

Scenario #4 – Business Process Admin



View
Dashboard

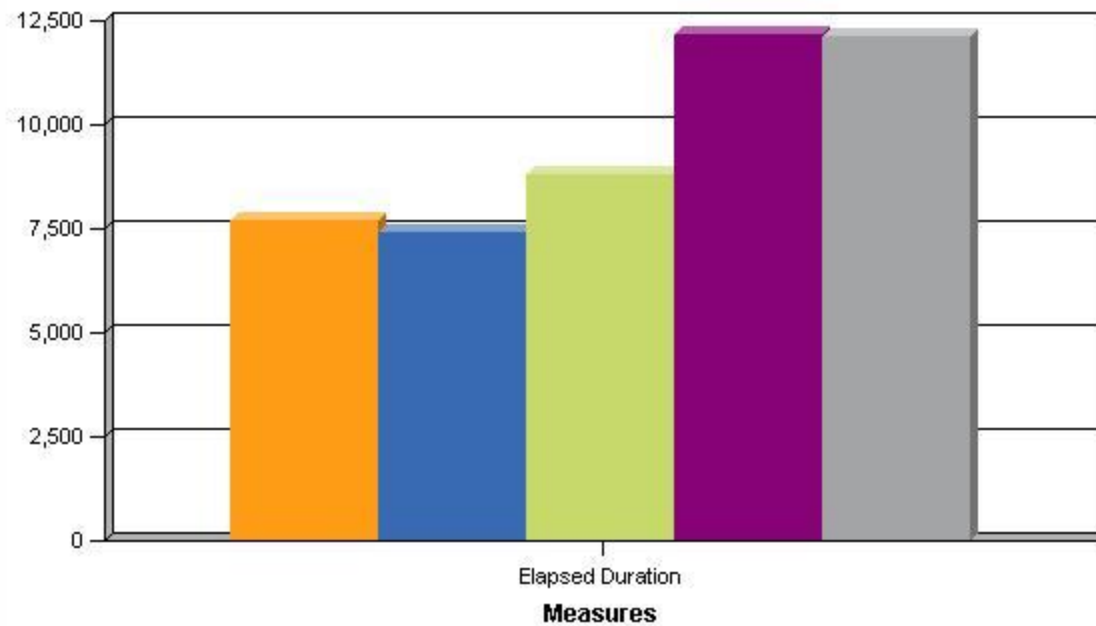
Edit Rules

Edit Rule
Groups

Dimensions

File Edit View Bookmarks Data Chart Tools Help

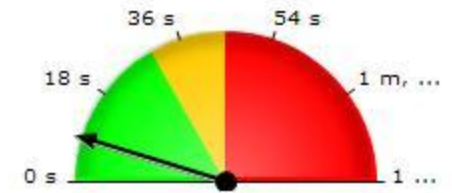
Department All Department



Budget Holder Approval Director Approval Financial Processing Purchasing Approval Senior Manager Approval

KPIs

Financial Processing



Edit Mode:EORApprovalsSet - Rule Set

Messages:

Description

Rules

Close Template List

Name	Display Name	Rule	Description	Action
ChemistrySeniorManager	ChemistrySeniorManager	In Chemistry , following Budget Holder approval, if the value is greater than £1500 , Senior Manager approval is required. Approval is provided by group SeniorManagers . A specific user is selectable from the group.		<input type="button" value="↓"/> <input type="button" value="Delete"/> <input checked="" type="checkbox"/> Synchronize Name
DentistryDirector	DentistryDirector	In Dentistry , following Senior Manager approval, if the value is greater than £2000 , Director approval is required. Approval is provided by group Directors . A specific user is selectable from the group.		<input type="button" value="↓"/> <input type="button" value="↑"/> <input type="button" value="Delete"/> <input checked="" type="checkbox"/> Synchronize Name
SeniorManager	SeniorManager	Following Budget Holder approval, if the value is greater than £500 , Senior Manager approval is required. Approval is provided by group SeniorManagers . A specific user is selectable from the group.		<input type="button" value="↓"/> <input type="button" value="↑"/> <input type="button" value="Delete"/> <input checked="" type="checkbox"/> Synchronize Name
Director	Director	Following Senior Manager approval, if the value is greater than £5000 , Director approval is required. Approval is provided by group Directors . A specific user is selectable from the group.		<input type="button" value="↓"/> <input type="button" value="↑"/> <input type="button" value="Delete"/> <input checked="" type="checkbox"/> Synchronize Name
Purchasing	Purchasing	Following Director approval, if the value is greater than £30000 , Purchasing approval is required. Approval is provided by group Purchasing . A specific user is not selectable from the group.		<input type="button" value="↑"/> <input type="button" value="Delete"/> <input checked="" type="checkbox"/> Synchronize Name

Templates

To create a new rule, fill in data in a template and click "Add" button.

Template Name	Name	Display Name	Rule	Description	Action
Approval Rule Template			Following approval, if the value is greater than £ , approval is required. Approval is provided by group . A specific user is selectable from the group.		<input type="button" value="Add"/>
Department Approval Rule Template			In , following approval, if the value is greater than £ , approval is required. Approval is provided by group . A specific user is selectable from the group.		<input type="button" value="Add"/>

Edit Mode:EorGroupLookup - Decision Table







Messages:

General Information

Display Name	<input type="text" value="EorGroupLookup"/>	<input checked="" type="checkbox"/> Synchronize with the name
Last Published	26-Feb-2008 14:55 (Local Time)	Status Original
Description	<div></div>	

Decision Table

Click  button for special actions menu available.

groupName  ↓	department  ↓	groupDn ↓
"Directors" 	"Chemistry" 	"ou=Chemistry,cn=Directors,cn=groups,dc=cityuniversity,dc=ac,dc=uk"
	"Social Sciences" 	"ou=Social Sciences,cn=Directors,cn=groups,dc=cityuniversity,dc=ac,dc=uk"
	Otherwise	"ou=" + department + ",cn=Directors,cn=groups,dc=cityuniversity,dc=ac,dc=uk"
"Purchasing" 	"Chemistry"	"cn=Purchasing,cn=groups,dc=cityuniversity,dc=ac,dc=uk"
	"Social Sciences"	"cn=Purchasing,cn=groups,dc=cityuniversity,dc=ac,dc=uk"
	Otherwise	"cn=Purchasing,cn=groups,dc=cityuniversity,dc=ac,dc=uk"
Otherwise	"Chemistry"	"ou=Chemistry,cn=" + groupName + ",cn=groups,dc=cityuniversity,dc=ac,dc=uk"
	"Social Sciences"	"ou=Social Sciences,cn=" + groupName + ",cn=groups,dc=cityuniversity,dc=ac,dc=uk"
	Otherwise	"ou=" + department + ",cn=" + groupName + ",cn=groups,dc=cityuniversity,dc=ac,dc=uk"

Scenario #5 – Portal Admin



Install Form
Module

Manage Form
Module

Assign Form
Permissions

IBM WebSphere Portal - Windows Internet Explorer

http://silver.bfs.net:10038/wps/myportal/!ut/p/c1/04_5B8K8xLLM9M5S2Py8xBz9CP0os3g_f6NQNxNPQ0MLM1dDAyMzDxl

Search web... IBM WebSphere Portal

Launch Administration > WebSphere Portal > Portlet Management > Form Modules > Search: All Sources Log Out

WebSphere Portal

Welcome

- Portal User Interface
 - Manage Pages
 - Themes and Skins
- Portlet Management
 - Web Modules
 - Applications
 - Form Modules**
 - Portlets
 - Web Services
 - Web Clipping
- Access
 - Users and Groups
 - Resource Permissions
 - Form Permissions
 - User and Group Permissions
 - Credential Vault
 - Resource Policies
- Portal Settings
 - Global Settings
 - URL Mapping
 - Custom Unique Names
 - Supported Markups
 - Supported Clients
 - Import XML
- Portal Content
 - Document Libraries
 - Web Content Libraries
 - Syndicators
 - Subscribers
- Search Administration
 - Manage Search
- Portal Analysis
 - Frequent Users
 - Enable Tracing
- Virtual Portals

Manage Form Modules

Search by: File name contains Search: Search

Form modules Click Install to install a Form module. Select a Form module to view its form applications and forms. Click Delete to remove the Form module from your portal.

Install

File	ID		
external-order-request.far	external-order-request		
san-form-app-1.0-SNAPSHOT.far	sickness-absence		
demo-forms.far	demo-forms		

Internet 100%

IBM WebSphere Portal - Windows Internet Explorer

http://silver.bfs.net:10038/wps/myportal/!ut/p/c1/pY-xDoIwEiafx5e4o4XStvBaakgJBBRYCIMxGAEH4_OLMugCDt6N332X_4cG5 Live Search

Search web... IBM WebSphere Portal

Launch Administration > WebSphere Portal > Portlet Management > Form Modules > Search: All Sources Log Out

WebSphere Portal

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 - Manage Virtual Portals

Manage Form Modules

Viewing Form module permissions for demo-forms

The forms in this application are listed below. Click the Done button to go back to the Form Modules page.

Form	Form Template	Process Template
Goods-In (GI) Form	/templates/demo.xfdl	GoodsInProcess
Approved Supplier Request (ASR) Form	/templates/demo.xfdl	ApprovedSupplierRequestProcess
Supplier Non-Conformance (SNC) Form	/templates/demo.xfdl	SupplierNonConformanceProcess

Done

Internet 100%

IBM WebSphere Portal - Windows Internet Explorer

http://silver.bfs.net:10038/wps/myportal/!ut/p/c1/pY8xDoJAEE4glnYGHYdmHZBUOWQECBhAYgxGwMJ5fEibsHCmfPMm_0M

Search web... IBM WebSphere Portal

Launch Administration > WebSphere Portal > Access > Form Permissions > Search: All Sources Log Out

WebSphere Portal

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 - Manage Virtual Portals

Assign Form Permissions

Search by: Form id contains Search:

Assign Form Permissions Search the uploaded forms and then select to edit access permissions.

ID	Display Name	Application ID
eor	External Order Request (EOR) Form	external-order-request
sar	Sickness Absence Report (SAR) Form	sickness-absence
san	Sickness Absence Notification (SAN) Form	sickness-absence
goods-in	Goods-In (GI) Form	demo-forms
supplier-non-conformance	Supplier Non-Conformance (SNC) Form	demo-forms
approved-supplier-request	Approved Supplier Request (ASR) Form	demo-forms

Waiting for http://silver.bfs.net:10038/wps/myportal/!ut/p/c1/pY8xDoJAEE4glnYGHYdmHZBUOWQECBhAYgxGwMJ5fEibsHCmfPMm_0M

Internet 100%

IBM WebSphere Portal - Windows Internet Explorer

http://silver.bfs.net:10038/wps/myportal/!ut/p/c1/pY_NDoIwEISfyOzy1_ZakC1VAoGAAhfSgzEYAAQ_G5xfkoBfw4M7xm9nl

Search web... IBM WebSphere Portal

Launch Administration > WebSphere Portal > Access > Form Permissions >

Search: All Sources Log Out

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Assign Form Permissions

Editing permissions for form eor of application external-order-request.

Add or remove users and user groups that can access this form. Click the OK button to save or the Cancel button to discard changes.

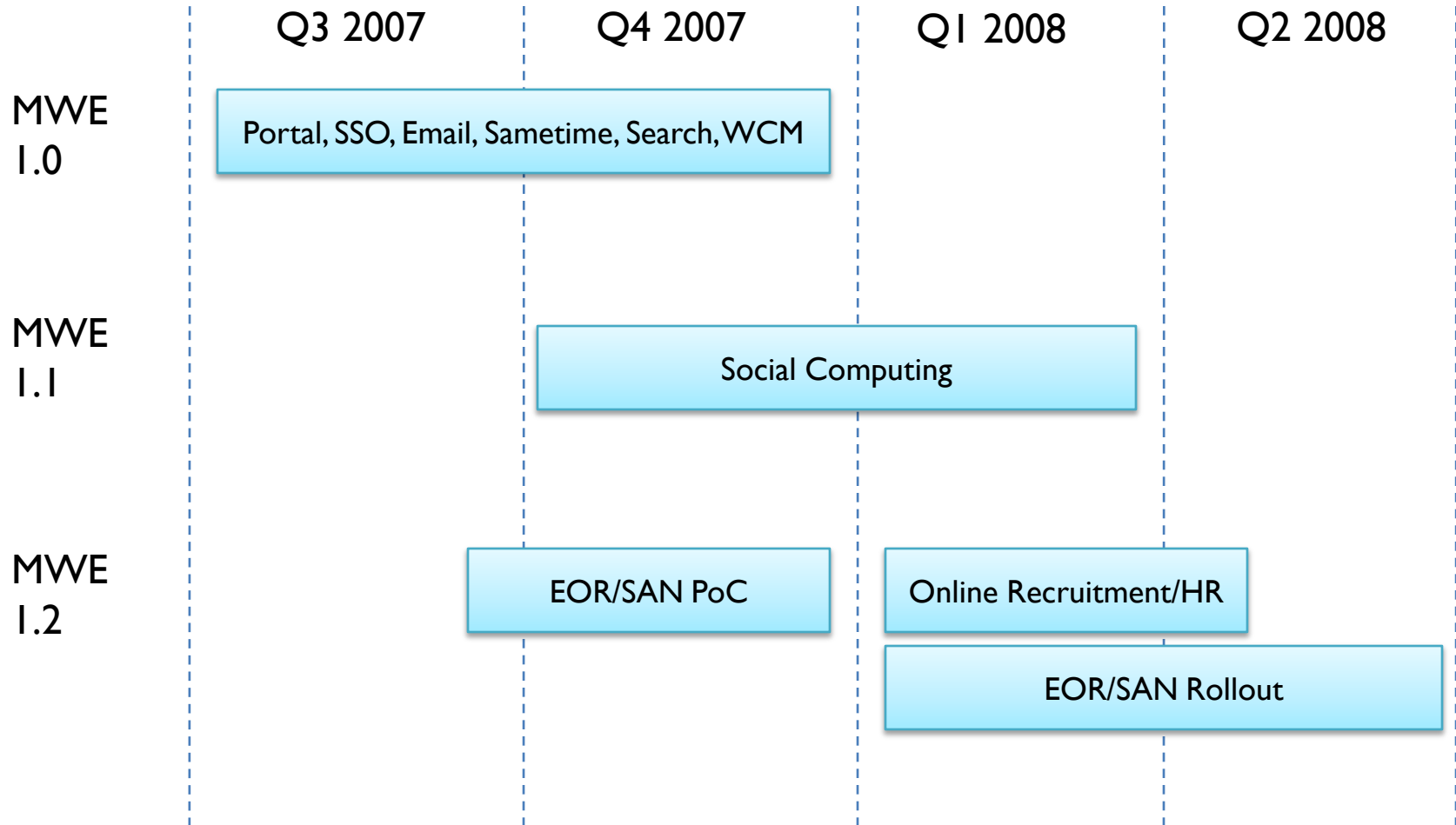
User Groups	Add
All Authenticated Portal Users	DeleteUserGroup

Users	Add
cceasy	DeleteUser
pwoods	DeleteUser

OK Cancel

Internet 100%

Where next for MWE?



More Information



call: +44 (0) 20 7183 8333

email: info@openlogic.co.uk

web: www.openlogic.co.uk

Info: www.openlogic.co.uk/openPortal

Process Portals Movie: www.openlogic.co.uk/promo

Concept Demo: www.openlogic.co.uk/demo

White Paper: www.openlogic.co.uk/whitepaper/index.php

Cardiff University Webcast : www.openlogic.co.uk/webcast