

WebSphere. Lombardi Edition 7.2

Quick Start Tutorial



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Overview of Quick Start Tutorial

Complete the exercises in this tutorial to quickly become familiar with Lombardi Authoring Environment. The tutorial walks you through a series of procedures where you can manipulate a sample process and then run it, without having to do any modeling or configuration.

Your first playback

Tasks	Time required	HR Open New Position process
<ol style="list-style-type: none"> 1. Open the tutorial process. 2. Play back the process. 	<ul style="list-style-type: none"> • 5 minutes • 15 minutes 	

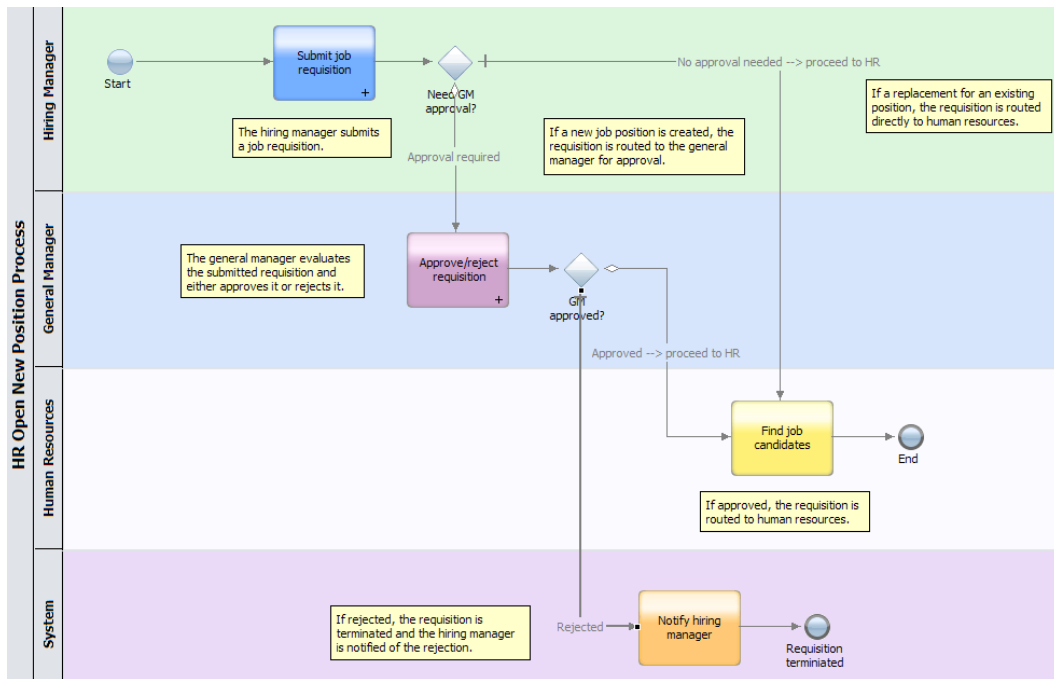
Objectives

After completing the tutorial exercises, you should be able to:

- [Open a process in the Designer.](#)
- [Run and review the process using the Inspector.](#)

The story: HR Open New Position process

This tutorial includes a sample process named **HR Open New Position**, shown in the following image.



The HR Open New Position process creates a job requisition either to fill a new position or to replace an existing position:

- The **hiring manager** determines the job position requirements and prepares a requisition for submission to the **human resources** (HR) department.
- If it is a replacement for an existing position, the requisition is routed directly from the hiring manager to the HR department, which can then search for job candidates.
- If it is a new position, the requisition is routed to the **general manager** (GM) for approval. The GM evaluates the submitted requisition and either approves it or rejects it.
- If the GM accepts it, the requisition is routed to HR, which can then search for job candidates. If the GM rejects it, the hiring manager is notified of the rejection and the requisition is terminated.

Setting up the Quick Start Tutorial

The following sections describe the steps required to access the Quick Start Tutorial process application in the Process Center Console and to open the process in the Designer.

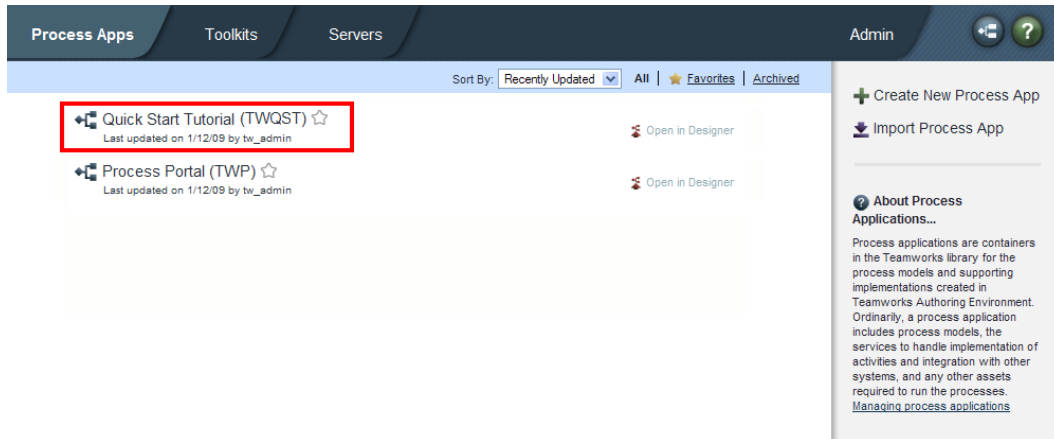
Before you begin

Before performing any of the following tasks:

- You must have access to the Process Center repository to use the Quick Start Tutorial. See *Managing access to the Process Center repository* in the *Authoring Environment User Guide* or online help for more information.
- Start Lombardi Authoring Environment and open the Process Center Console as explained in *Starting Lombardi Authoring Environment* in the *Authoring Environment User Guide* or online help.
- Some of the activities in the HR Open New Position process have not been implemented, in case you want to experiment with the implementations. See [Managing access to the tutorial](#) for more information.
- Because the views and functionality available in the Designer in Lombardi Authoring Environment are determined by the settings in **File > Preferences > Lombardi > Capabilities**, some of the images in the following instructions might not match the views that you see in the Designer.

Verifying that the tutorial has been imported

The Quick Start Tutorial process application should have been imported during installation. You should see the process application when viewing the **Process Apps** tab in the Process Center Console, as shown in the following image. If you see the Quick Start Tutorial process application, go to [Opening the tutorial process](#).



If you do not see the Quick Start Tutorial process application, you can import it as described in the following steps:



To import, you must have access to the Process Center repository. See *Managing access to the Process Center repository* in the *Authoring Environment User Guide* or online help for more information about the users who have access to the Process Center repository.

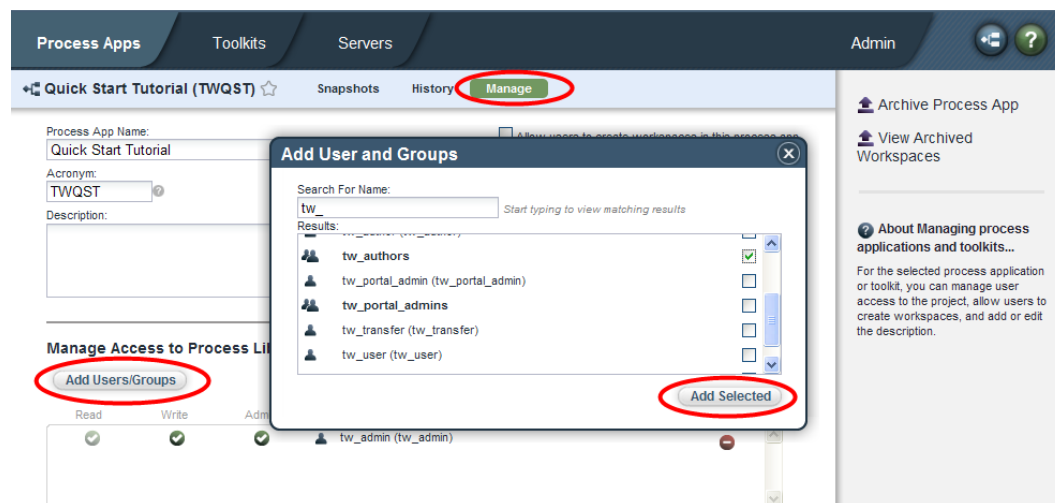
1. Select the **Import Process App** option.
2. In the **Import Process App** dialog, select
[Lombardi_home]\imports\quick-start-tutorial.twx.
3. Click **Import**.

Managing access to the tutorial

To enable users to access the Quick Start Tutorial, an administrator should grant read access to the process application as described in the following steps:

1. Select the **Process Apps** tab.
2. Select the Quick Start Tutorial process application to open its configuration settings.
3. Select the **Manage** option.
4. Under **Manage Access to Process Library**, click the **Add Users/Groups** button.
5. In the **Add Users and Groups** dialog, enter the name of the user or group that you want to add in the **Search for Name** field. You can enter part of the name and Lombardi displays all accounts that match as shown in the following example.
6. Click the check box next to the users and groups that you want to add and then click the **Add Selected** button as shown in the following example.

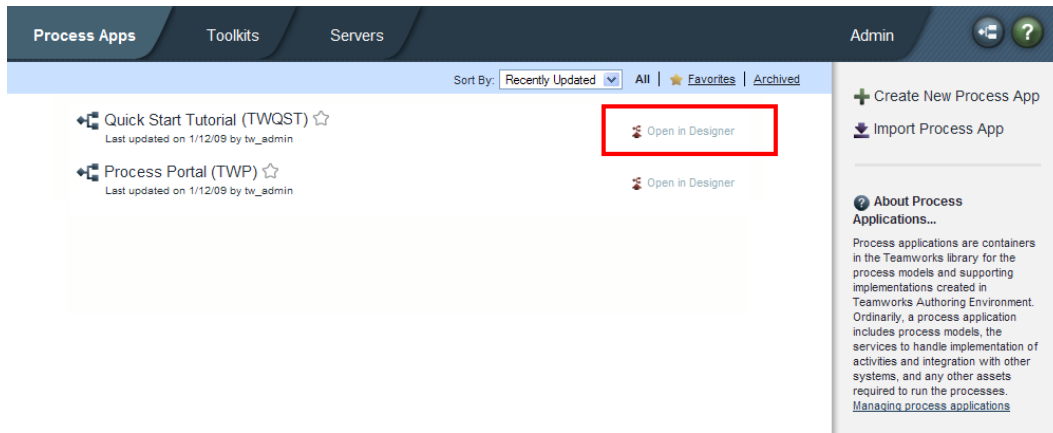
The **Read** option is selected by default for each user or group that you add. Read access to the Quick Start Tutorial is recommended so that all users in your Lombardi configuration can access and run the sample process. If users are allowed to edit the process, services, or other implementations, the tutorial may not function properly. If users want to experiment with the implementations included in the tutorial, you can copy the library items to a new process application and grant the appropriate access to those users.



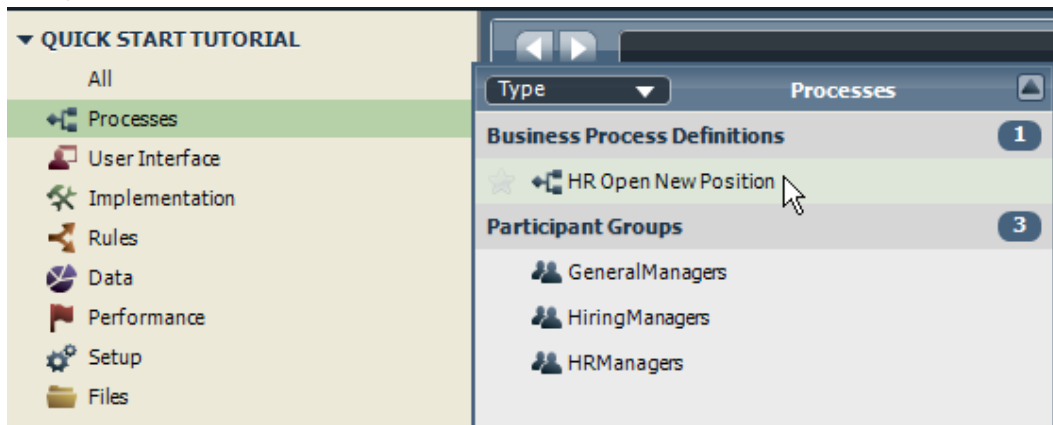
Opening the tutorial process

To open the Quick Start Tutorial process:

1. Select the **Process Apps** tab.
2. Click the **Open in Designer** option next to the Quick Start Tutorial process application:



3. In the Designer library, click **Processes** to view a list of available process definitions.
4. From the list, double-click the **HR Open New Position** process definition. The process opens in the Designer view.



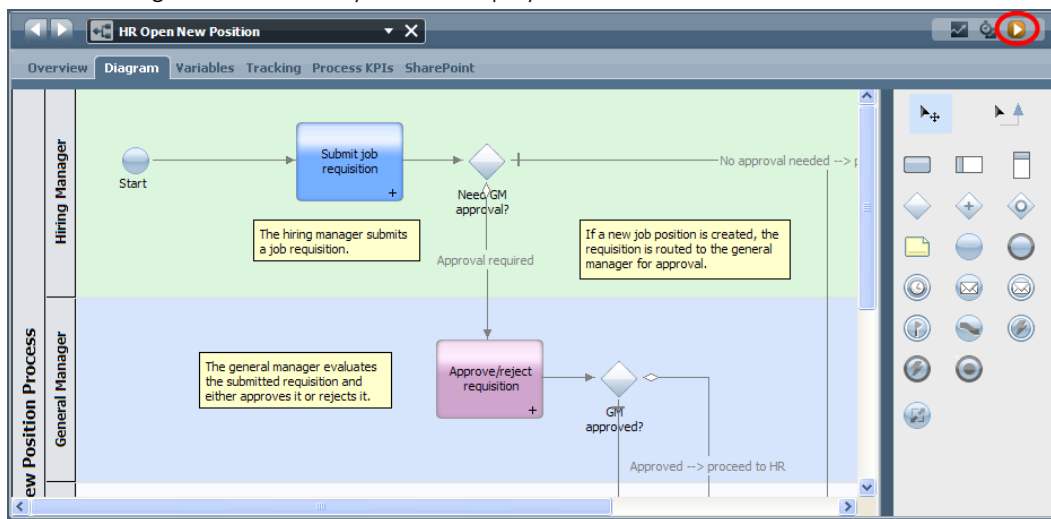
Playing back the tutorial process

The Inspector in Lombardi Authoring Environment enables you to play back a process so you can see how the process will work for each of the process participants. The HR Open New Position process creates a job requisition either to fill a new position or to replace an existing position. Complete the steps in the following sections to run and review each of these process workflow scenarios.

Starting the process

1. Click the **HR Open New Position** process diagram to ensure it is selected.
2. Click the **Run Process** icon, as shown in the following image. This launches the **Submit job requisition** activity, which creates a **Submit requisition** task for the hiring manager. When submitting a job requisition, the hiring manager has two options:
 - Create a new job position (requires the general manager's approval).
 - Replace an existing position (approval is not required).

The following sections show you how to play back each of these scenarios.



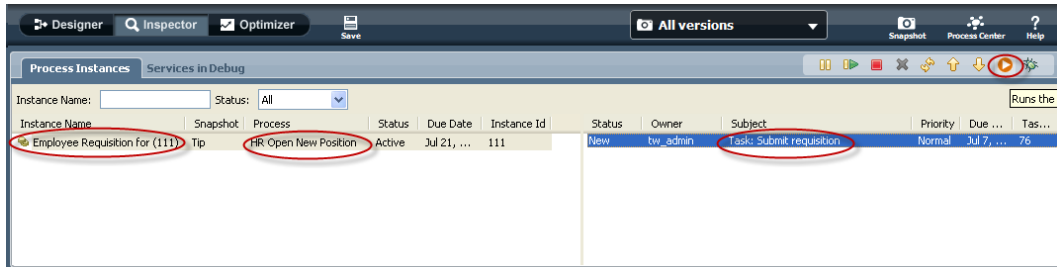
Creating a new position (approval required)

The HR Open New Position process creates a job requisition either to fill a new position or to replace an existing position. The following steps walk you through the first of these two workflow scenarios: filling a new position (requires the general manager's approval).

1. If you have not already started a new instance of the HR Open New Position process, then in the Designer, click the Run icon above the process diagram as shown in the preceding image.
2. When the instance starts, you may be prompted to switch to the **Inspector**. Click **Yes** to open the process diagram in the Inspector. The **Process Instances** view shows all active and completed instances of your process, and the currently running snapshot (version) of your process definition. You can see that a new, active process instance has started.

Playing back the tutorial process

- Click the active instance in the left pane to display the new **Submit requisition** task in the right pane of the Process Instances view.
- Start the task in the Inspector by clicking the **Run Task** icon in the toolbar:



The **Submit requisition** task generates a **Create Job Requisition** coach in a Web browser window:


Requisition number:	<input type="text"/>	Date:	10-13-2009
Hiring manager:	<input type="text"/>	Department*:	--Select a department--
Employment status*:	--Select a status--	Number of employees needed:	<input type="text"/>
Location*:	--Select a location--	Job title:	<input type="text"/>
Position type*:	--Select a position type--		

- Acting as the hiring manager, complete the requisition information as shown in the following example, and then click the **Next** button.

Requisition number:	001	Date:	10-13-2009
Hiring manager:	Scott	Department*:	Finance
Employment status*:	Full time	Number of employees needed:	1
Location*:	Boston	Job title:	Accountant
Position type*:	New		

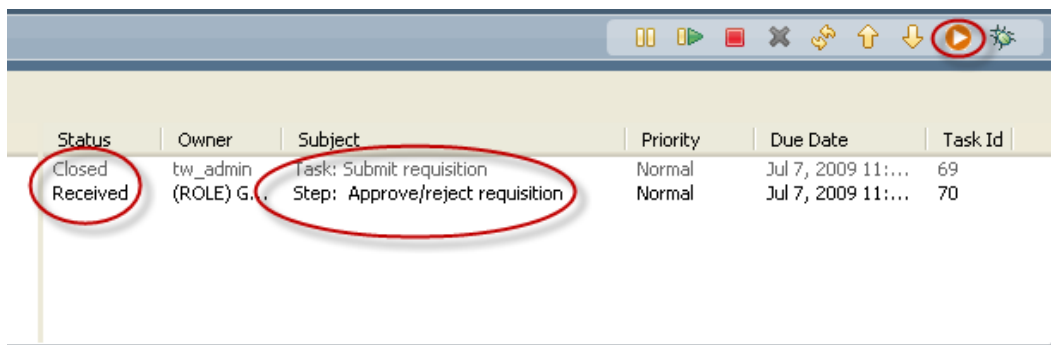
- As the hiring manager, review the information in the **Confirm Job Position** coach, and then click the **Submit** button. This completes the hiring manager's task for this process instance.

Requisition number:	001	Date:	10-13-2009
Hiring manager:	Scott	Department:	Finance
Employment status:	Full time	Number of employees needed:	1
Location:	Boston	Job title:	Accountant
Position type:	New		

- In the Inspector in Lombardi Authoring Environment, click the Refresh  icon in the toolbar to update the Process Instances view. You can see that the **Submit requisition** task is now closed.

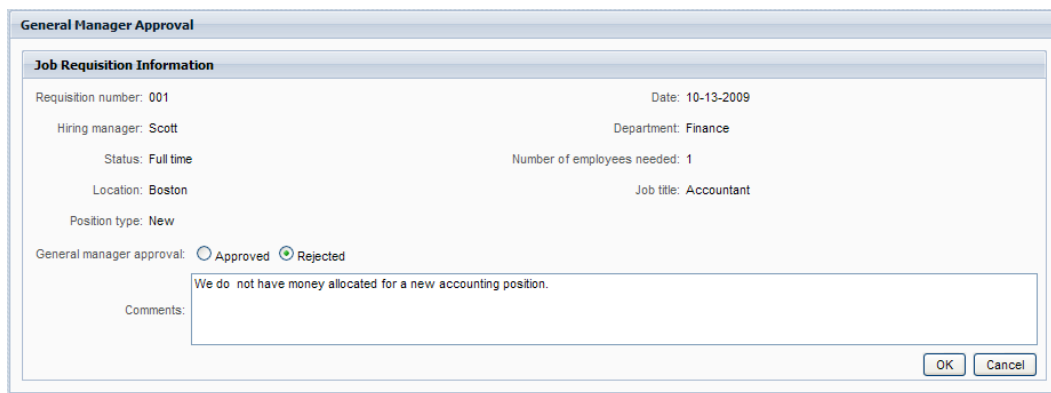
Because the hiring manager submitted a request to open a new position, the general manager must approve the new position before the requisition can be routed to the HR department. Thus, the process instance moves to the next activity, and generates the **Approve/reject requisition** task for the general manager, as shown in the following image.

8. Start the task in the Inspector by clicking the **Run Task** icon. In some cases, you might need to select a user account or provide a password for a specific user account in order to run the task.

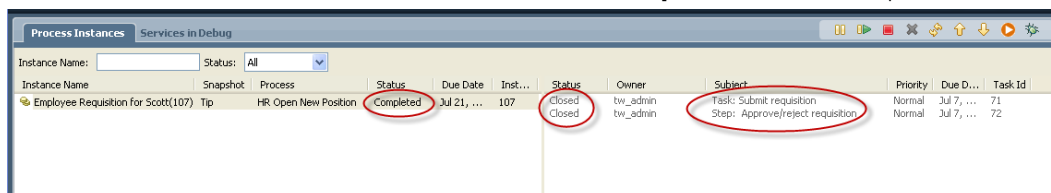


The **Approve/reject requisition** task generates a **General Manager Approval** coach in a Web browser window, as shown in the following image.

9. Acting as the general manager, review the job requisition information in the form, and then select either **Approved** to approve the request or **Rejected** to reject the request. If you select **Rejected**, then the coach displays a **Comments** field so that you can provide a reason for the rejection. When the form is completed, click **OK**.



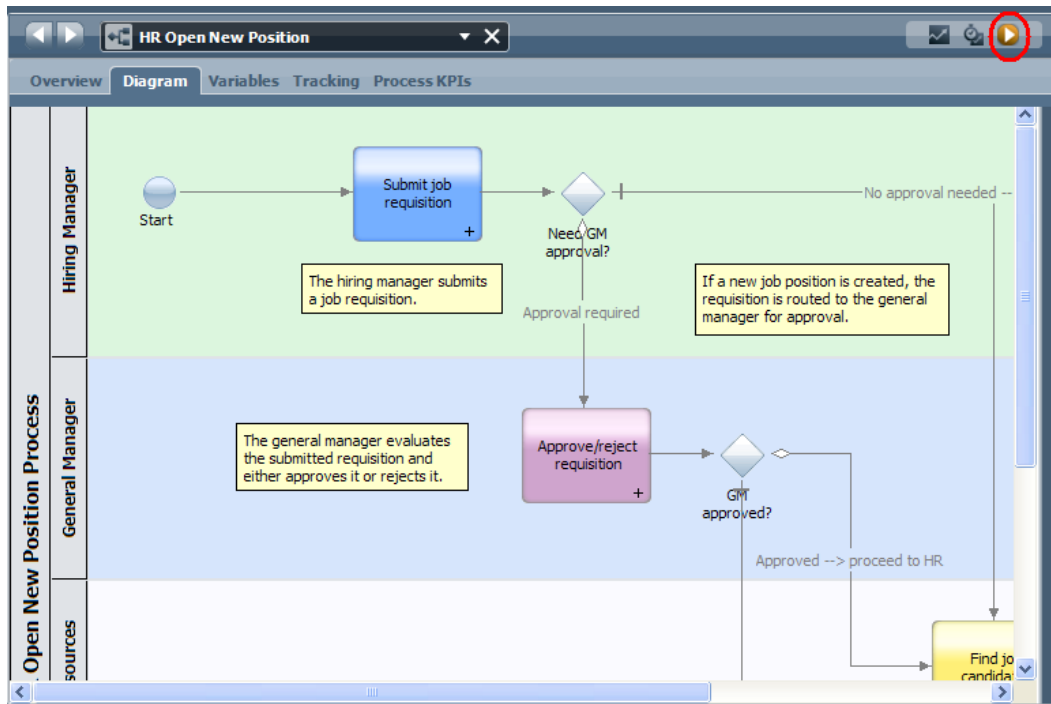
10. Refresh the Process Instances view in Inspector. You can see that the **Approve/reject requisition** task is now closed, and the current instance of the **HR Open New Position** process is now completed.



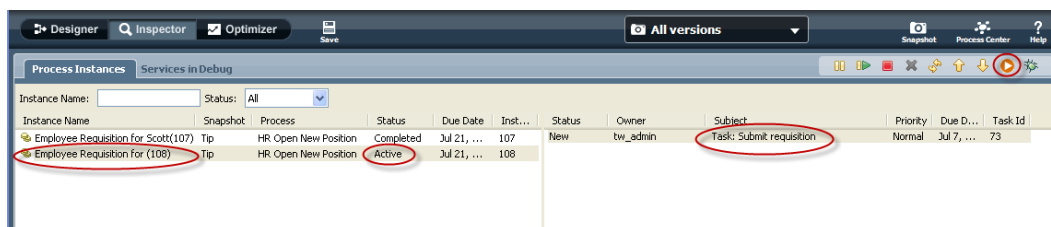
Replacing an existing position (no approval required)

The HR Open New Position process creates a job requisition either to fill a new position or to replace an existing position. The following steps walk you through the second of these two workflow scenarios: replacing an existing position (does not require the general manager's approval).

1. To start a new instance of the HR Open New Position process, click the Run icon above the process diagram in the Inspector as shown in the following image.



2. When the process starts, you may be prompted to switch to the **Inspector**. Click **Yes** to open the process diagram in the Inspector. The **Process Instances** view shows a new (active) process instance.
3. Select the active instance in the left pane to display the new **Submit requisition** task in the right pane of the Process Instances view.
4. Start the task in the Inspector by clicking the **Run Task** icon, as shown in the following image.



The **Submit requisition** task generates a **Create Job Requisition** coach in a Web browser window, as shown in the following image.

Create Job Requisition

Job Requisition Information

Requisition number:

Hiring manager:

Employment status:*

Location:*

Position type:*

Date: 10-13-2009

Department:*

Number of employees needed:

Job title:

- Acting as the hiring manager, complete the requisition information as shown in the following example, and then click the **Next** button.

Create Job Requisition

Job Requisition Information

Requisition number: 002

Hiring manager: Scott

Employment status:* Full time

Location:* Boston

Position type:* Existing

Date: 10-13-2009

Department:* Finance

Number of employees needed: 1

Job title: Accountant

- Acting as the hiring manager, complete the **Replace Existing Job Position** coach, and then click the **Next** button.

Replace Existing Job Position

Job Requisition Information

Position type: Existing

Job title: Accountant

Replacement for:

Last name: Smith

First name: Bob

Supervisor: Scott

Start date: 10-13-2006

Pay level: 7

Pay type: Exempt

Notes: Bob Smith is leaving the company in two weeks. We need to find a qualified replacement ASAP.

- Acting as the hiring manager, review the information in the **Confirm Job Position** coach, and then click the **Submit** button. This completes the hiring manager's task for this process instance.

Confirm Job Position

Job Requisition Information

Requisition number: 002

Hiring manager: Scott

Employment status: Full time

Location: Boston


Position type: Existing

Date: 10-13-2009

Department: Finance

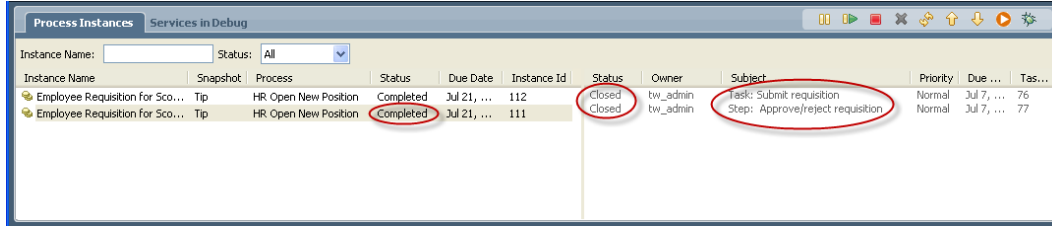
Number of employees needed: 1

Job title: Accountant

- In the Inspector in Lombardi Authoring Environment, click the refresh  icon to refresh the Process Instances view. You can see that the **Submit requisition** task is now closed.

Because the hiring manager submitted a requisition to replace an existing position, GM approval is not required and the HR Open New Position process instance is completed.

Playing back the tutorial process



The screenshot shows a 'Process Instances' window with a table of process instances. The table has columns for Instance Name, Snapshot, Process, Status, Due Date, Instance Id, Status, Owner, Subject, Priority, Due Date, and Task. Two instances are listed, both with a status of 'Completed'. The 'Subject' column for the second instance is circled in red, showing 'Task: Submit requisition' and 'Step: Approve/reject requisition'.

Instance Name	Snapshot	Process	Status	Due Date	Instance Id	Status	Owner	Subject	Priority	Due ...	Tas...
Employee Requisition for Sco...	Tip	HR Open New Position	Completed	Jul 21, ...	112	Closed	tw_admin	Task: Submit requisition	Normal	Jul 7, ...	76
Employee Requisition for Sco...	Tip	HR Open New Position	Completed	Jul 21, ...	111	Closed	tw_admin	Step: Approve/reject requisition	Normal	Jul 7, ...	77

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