



# Using e-mail with Lotus Workflow and Web Content Publisher

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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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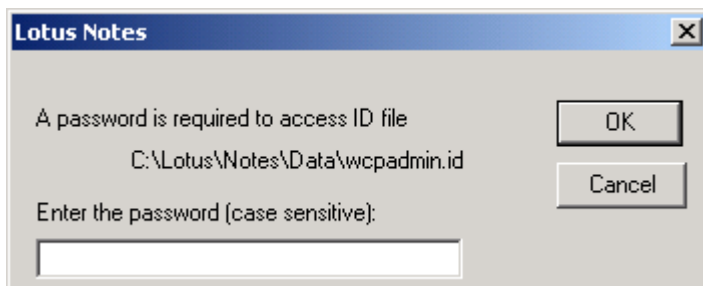
## INTRODUCTION

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

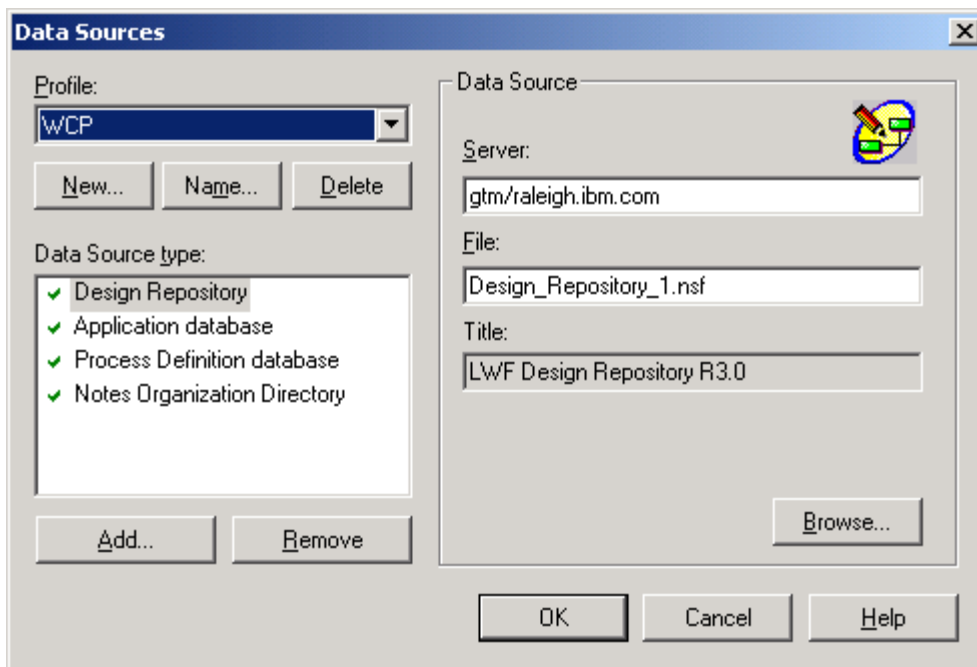
Lotus Workflow Architect is a Windows GUI tool that ships with Lotus Workflow. Start Architect from the Windows Start menu. If a login window is displayed, enter the password of the WCP Admin ID. If this window shows a user that does not have workflow administration privileges (e.g. greg, rob), switch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



*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:



*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.

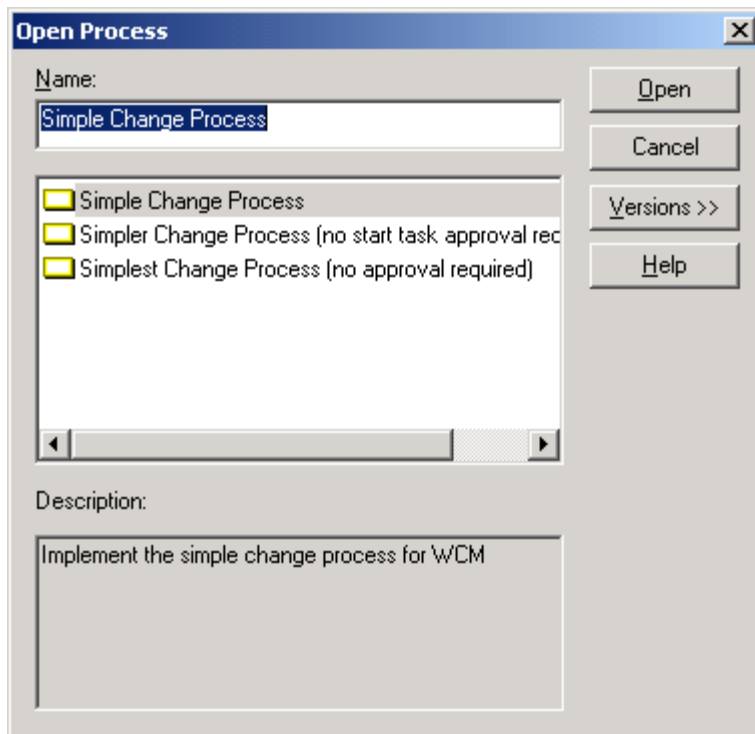
# CONFIGURING A LOTUS WORKFLOW PROCESS FOR NOTIFICATION OF NEW ACTIVITIES

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.

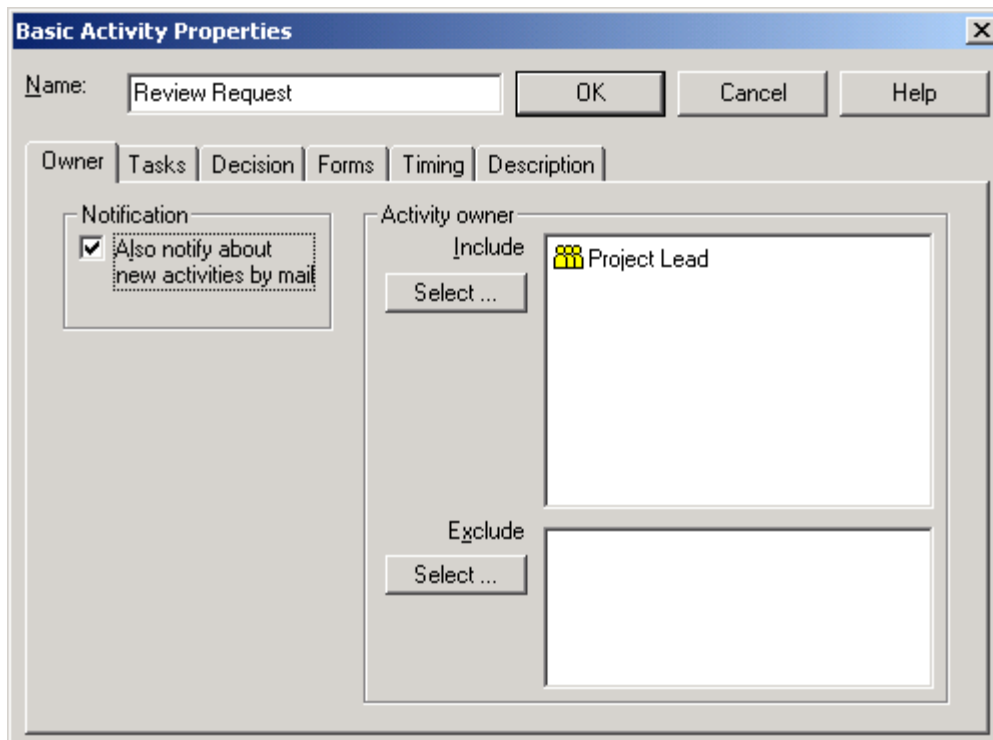
**Step 1.** Open a LWF process.

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



*Figure 3. Selecting the Simple Change Process*

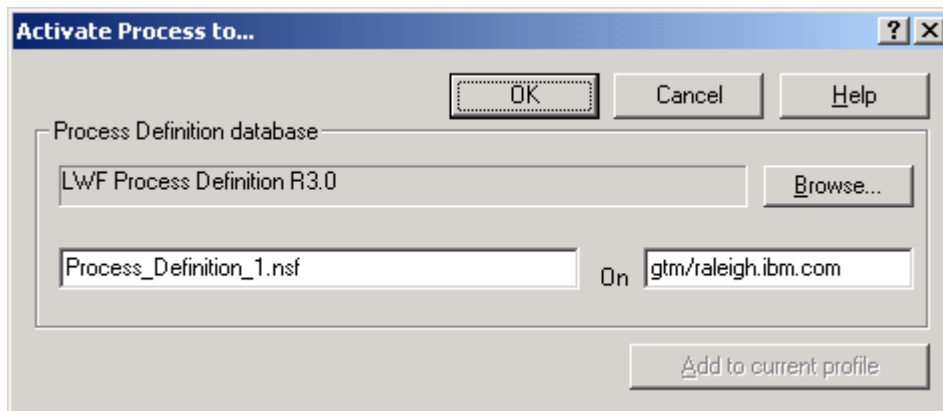
- Step 2.** Select the activity for which you want to trigger e-mail.
- Right-click **Review Request** (or other activity you wish to modify) and select **Basic Properties**.
  - Check the **Notification** check box.
  - Click **OK** and save the process using **File->Save Process**.



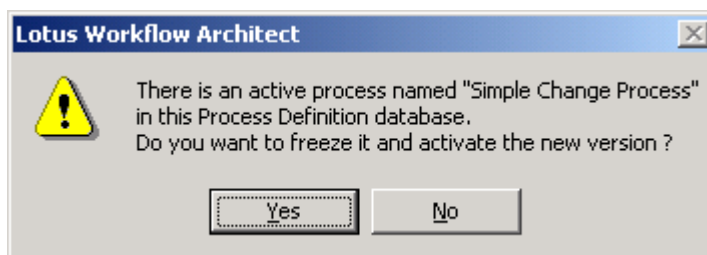
*Figure 4. Selecting an activity*

**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).



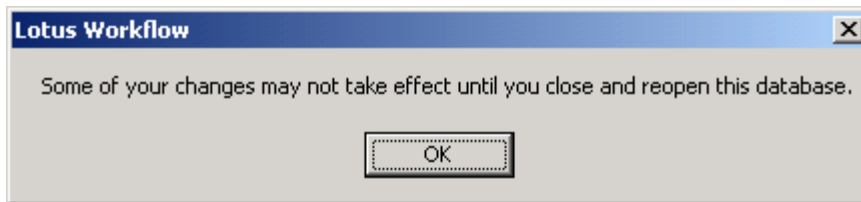
*Figure 5. Activating the process*



*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).



*Figure 7. Warning dialog*

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

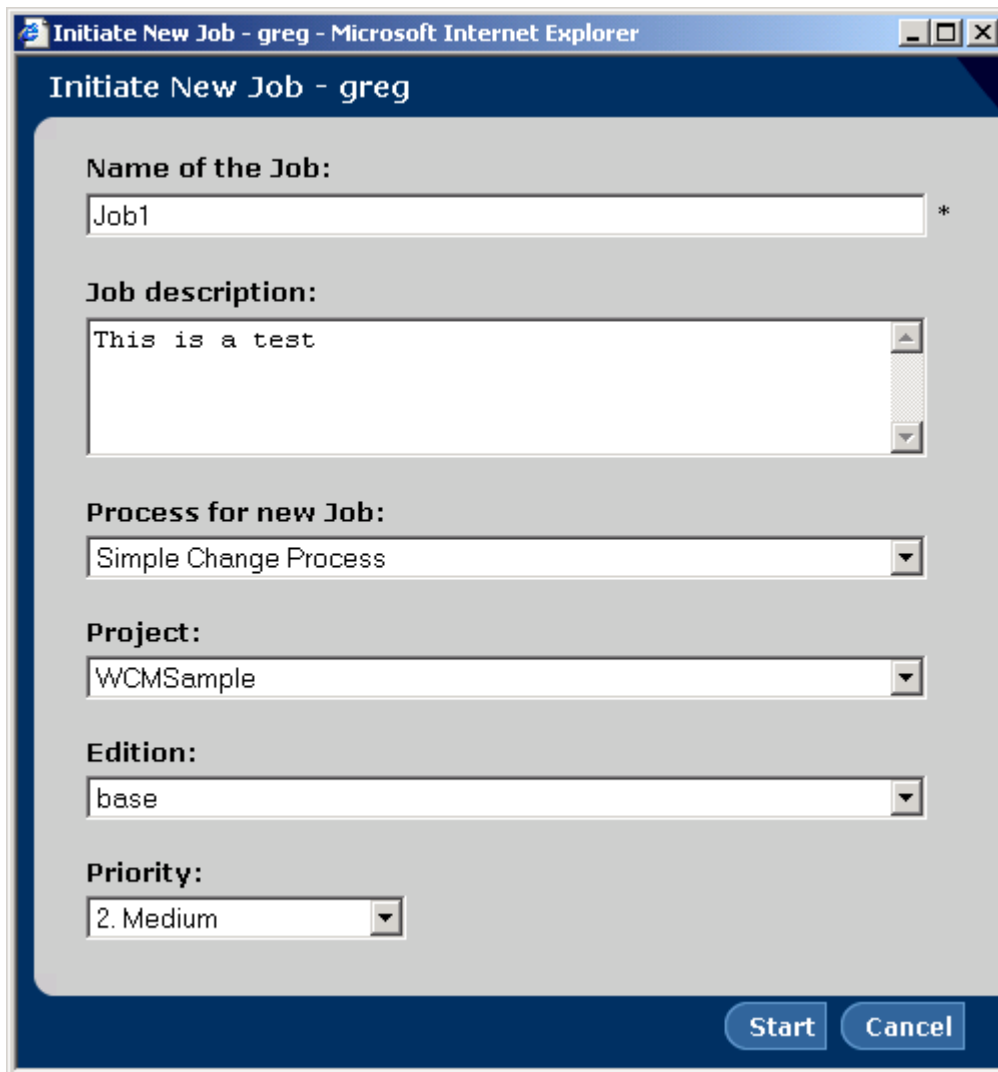
From now on, whenever a Review Change activity is created, e-mail will be sent to users in the role assigned to that activity. In this example, anyone assigned to the role of Project Lead will receive e-mail.

# 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*.



The screenshot shows a web browser window titled "Initiate New Job - greg - Microsoft Internet Explorer". The page content is titled "Initiate New Job - greg" and contains the following form elements:

- Name of the Job:** A text input field containing "Job1" with an asterisk (\*) to its right.
- Job description:** A text area containing "This is a test".
- Process for new Job:** A dropdown menu with "Simple Change Process" selected.
- Project:** A dropdown menu with "WCMSample" selected.
- Edition:** A dropdown menu with "base" selected.
- Priority:** A dropdown menu with "2. Medium" selected.
- Buttons:** "Start" and "Cancel" buttons are located at the bottom right of the form.

*Figure 8. Creating a new Job*



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

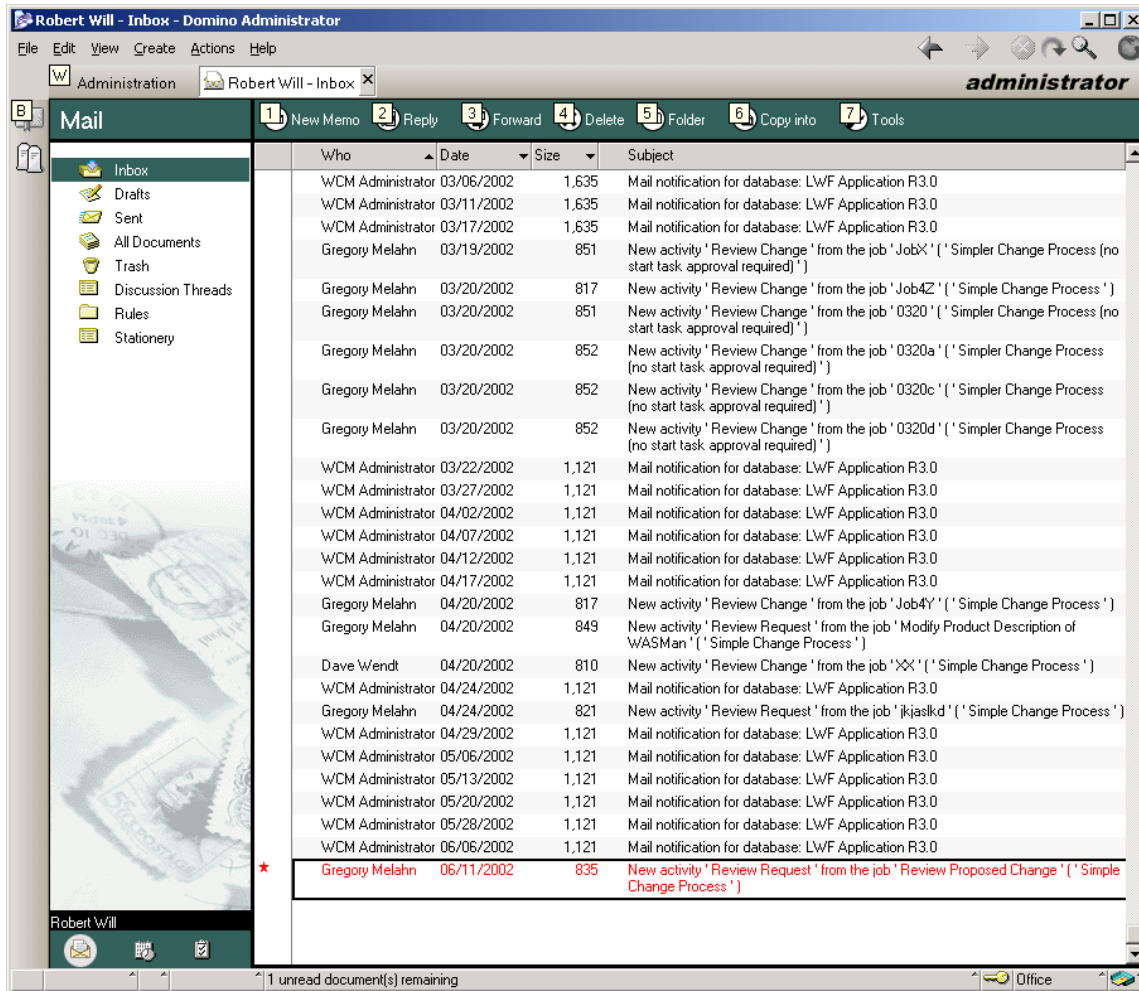
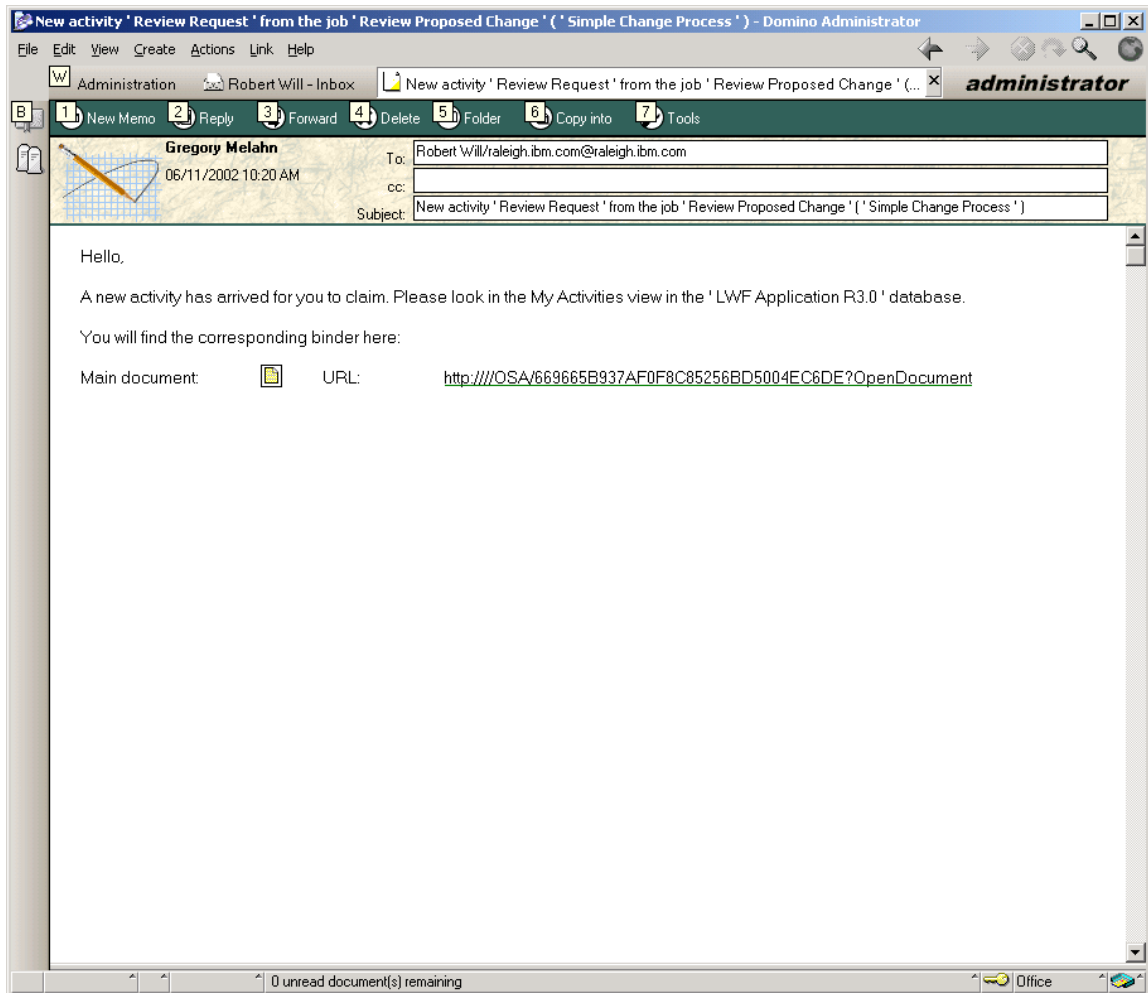


Figure 9. Notes inbox

**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.

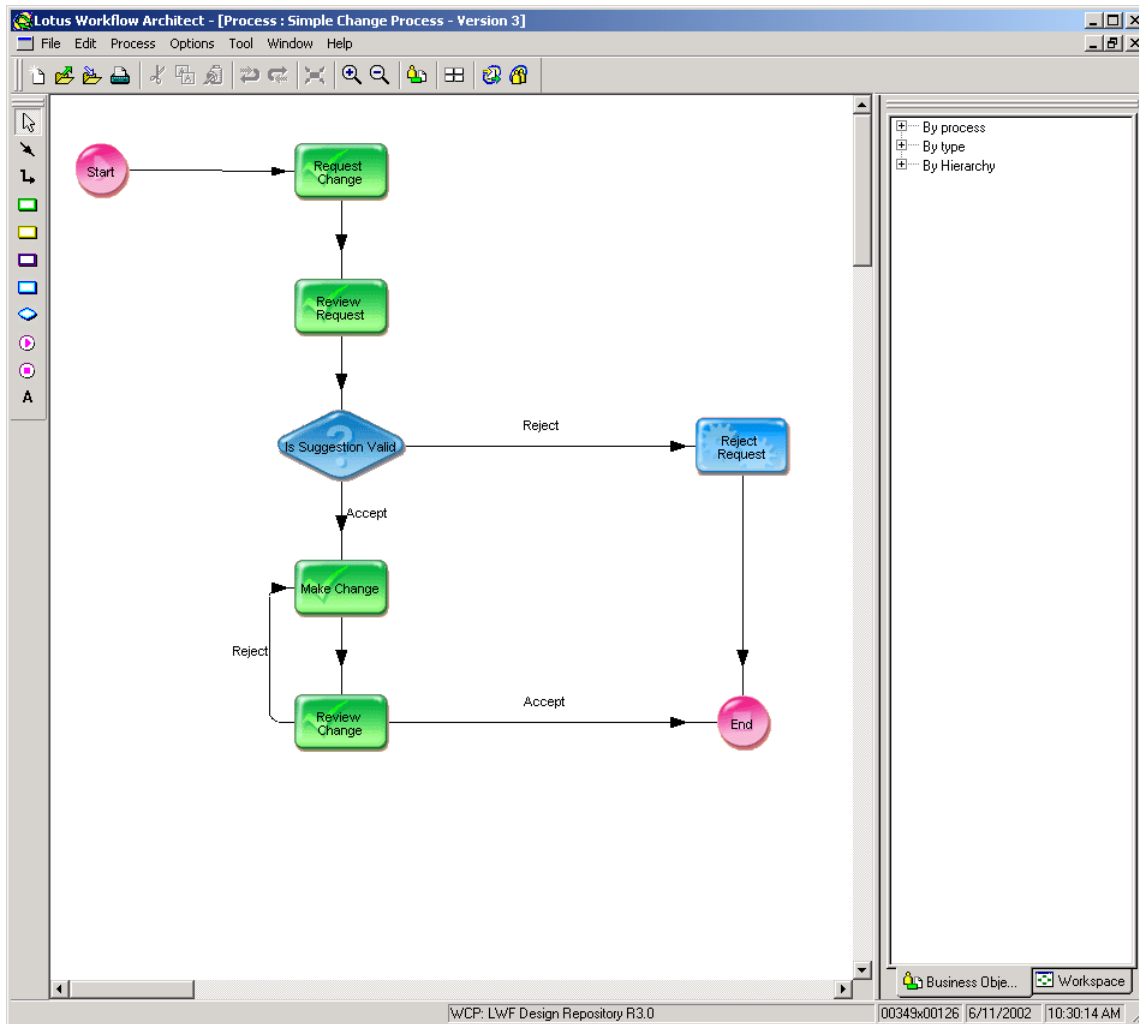


*Figure 10. E-mail contents in Lotus Notes*

# CONFIGURING NOTIFICATION OF OVERDUE TASKS

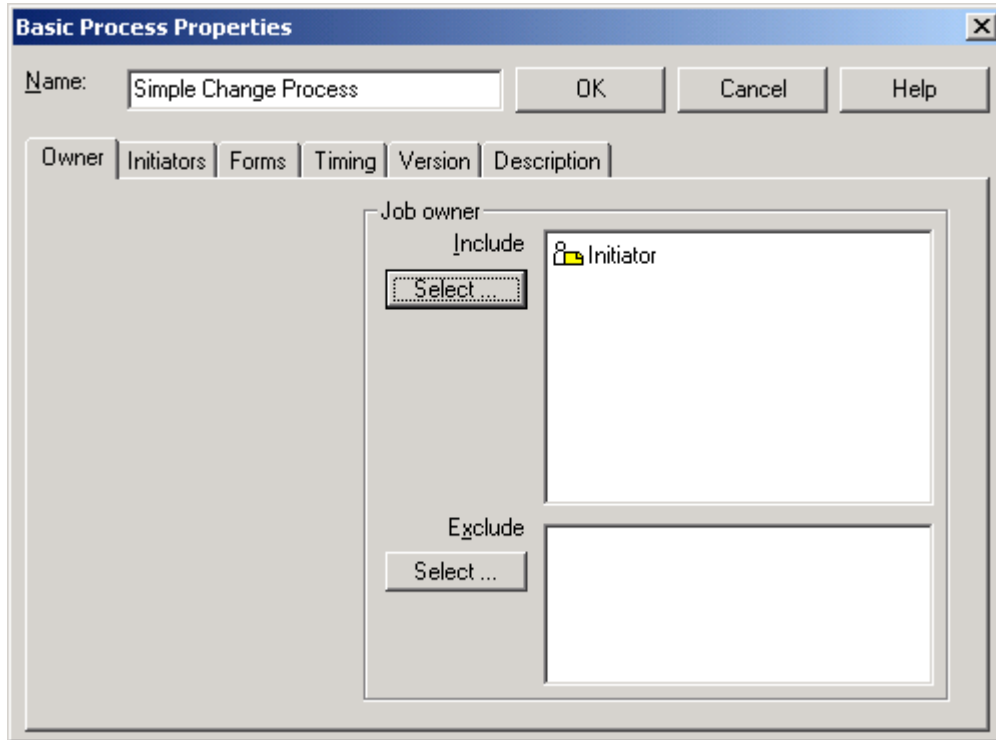
Another capability of Lotus Notes is to notify users when tasks are overdue. To configure this capability, complete the following steps:

**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**.



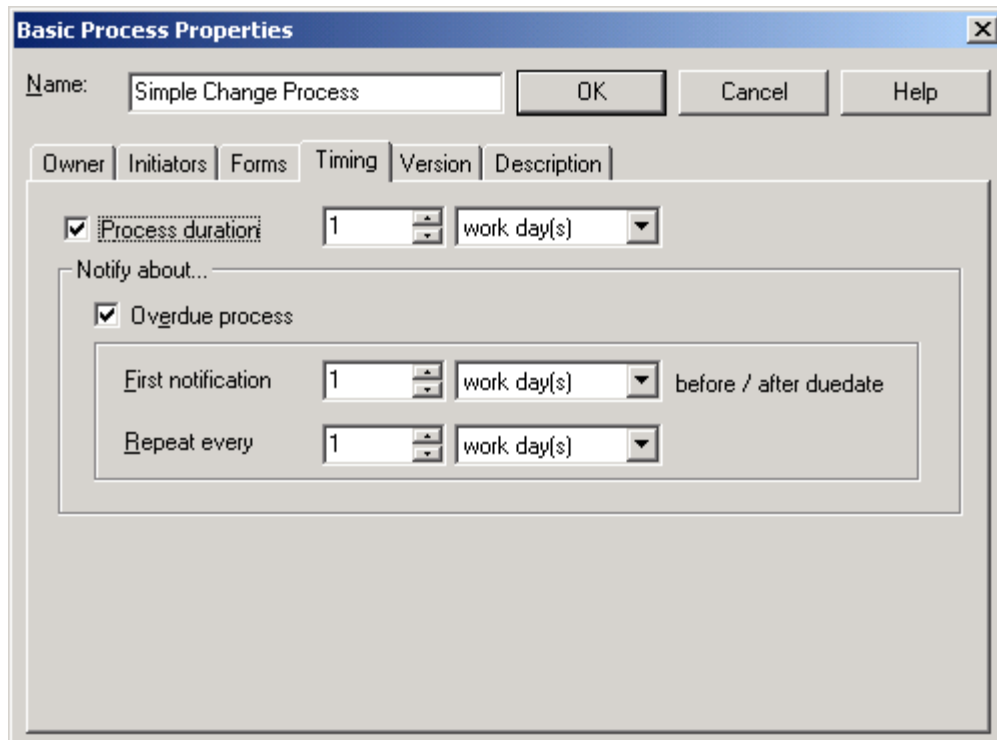
*Figure 12. Basic Properties dialog*

- Step 3.** Modify settings in the Basic Process Properties dialog.
- Select the **Timing** tab and check the **Process duration** check box.

The image shows a screenshot of the 'Basic Process Properties' dialog box. The title bar reads 'Basic Process Properties' with a close button (X) on the right. Below the title bar, there is a 'Name:' field containing 'Simple Change Process' and three buttons: 'OK', 'Cancel', and 'Help'. Below this, there are five tabs: 'Owner', 'Initiators', 'Forms', 'Timing', 'Version', and 'Description'. The 'Timing' tab is selected. In the 'Timing' tab, there is a checked checkbox labeled 'Process duration'. To its right is a numeric spinner set to '0' and a dropdown menu set to 'work day(s)'. Below this is a section titled 'Notify about...'. Inside this section, there is an unchecked checkbox labeled 'Overdue process'. Below the checkbox, there are two rows of settings: 'First notification' with a numeric spinner set to '0' and a dropdown set to 'work day(s)', followed by the text 'before / after duedate'; and 'Repeat every' with a numeric spinner set to '1' and a dropdown set to 'work day(s)'.

*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.



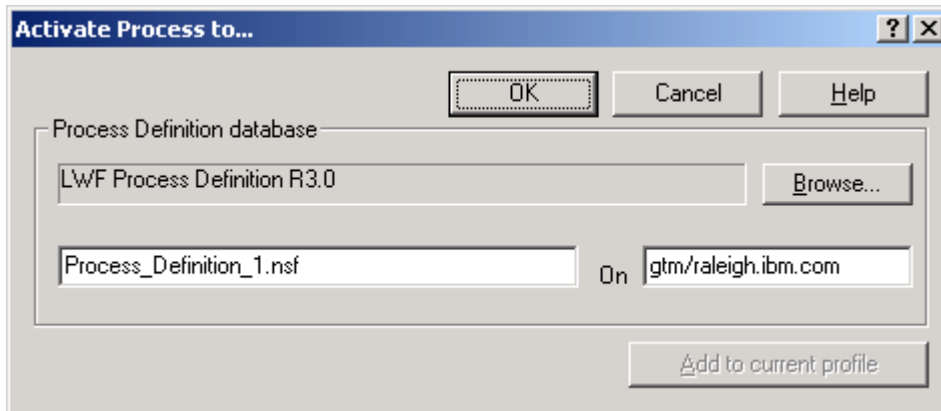
The screenshot shows the 'Basic Process Properties' dialog box with the 'Timing' tab selected. The 'Name' field is 'Simple Change Process'. The 'Process duration' is set to 1 work day(s). The 'Notify about...' section has the 'Overdue process' checkbox checked. Below it, 'First notification' is set to 1 work day(s) before / after due date, and 'Repeat every' is set to 1 work day(s).

*Figure 14. Setting the Overdue process*

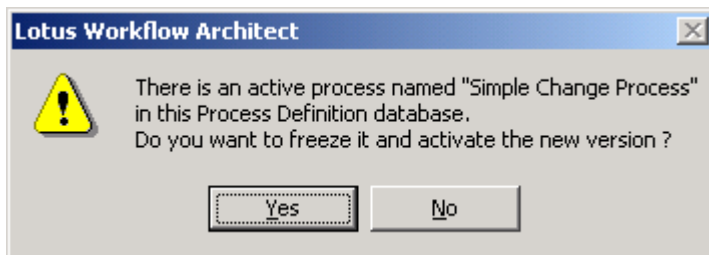
**Step 4.** Save the process.

**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).



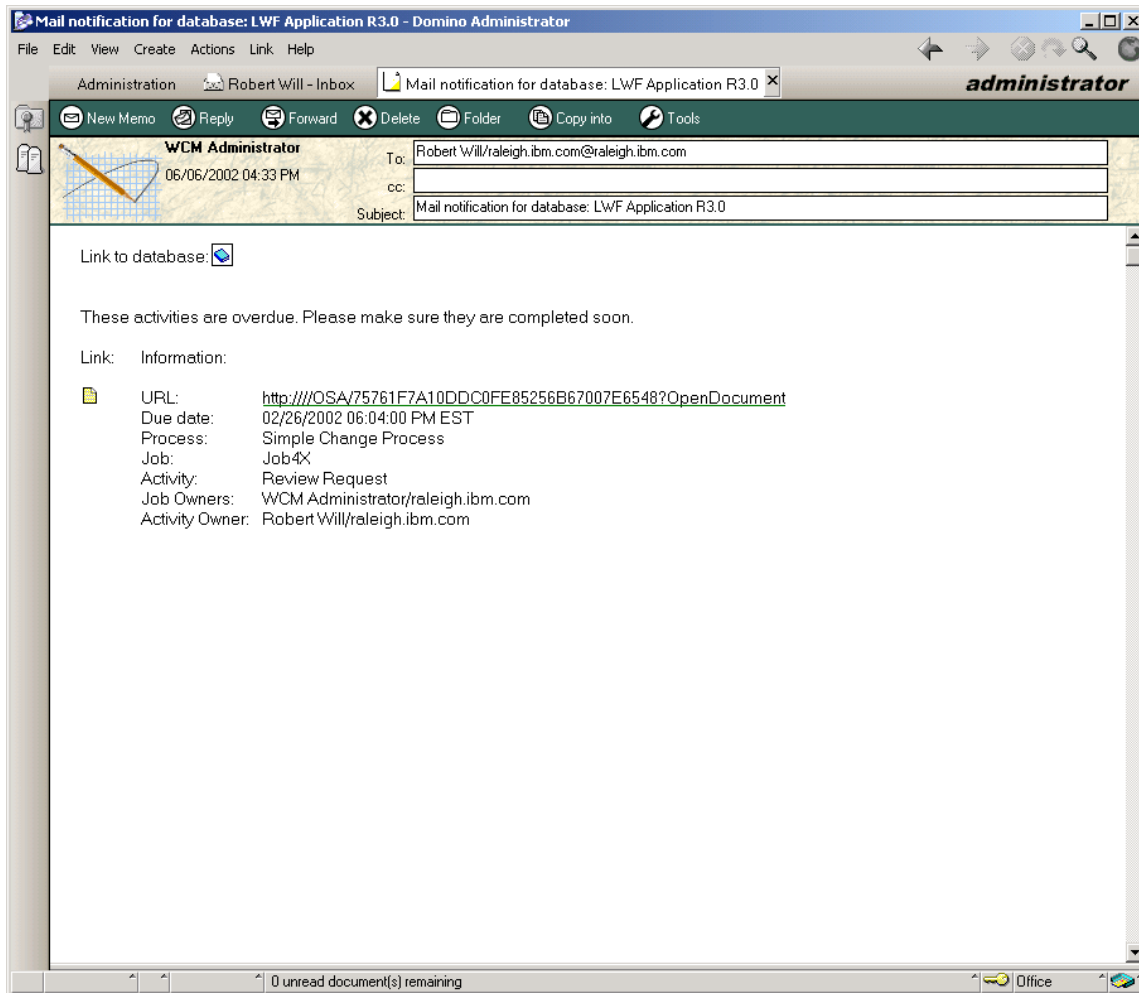
*Figure 15. Activating the process*



*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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