



Getting Started

Note

Before using this information and the product it supports, be sure to read the information general information under "Notices and Trademarks" on page 33.

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Getting started

After you install WebSphere Business Modeler, you can become familiar with the product by examining the interface, learning about the editors, exploring the samples, and beginning to model a simple process.

Chapter 1. Looking at the interface

Use these methods to get to know the WebSphere Business Modeler interface.

Examining the screen

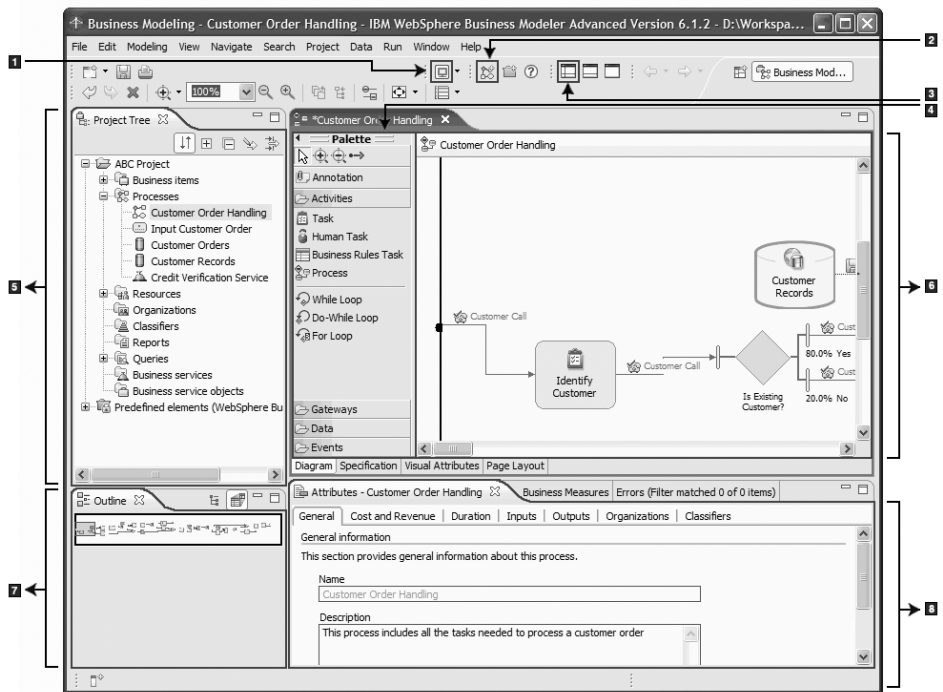
This section shows the main views and buttons of WebSphere Business Modeler.

The following image shows the product with the ABC Project sample loaded and open to a process diagram that is displayed in BPMN style. The ABC sample can be loaded by following the steps in the task “Importing the ABC Project sample” on page 20. To see the four panes that are shown in the

image, click the **Apply 4-pane layout**  button on the main toolbar (3).

Legend

1. **Select a mode** button (the icon changes based on the mode you select)
2. **Start process modeling** button
3. **Apply 4-pane layout** button
4. Palette
5. Project Tree view
6. Process editor (showing a process diagram)
7. Outline view
8. Attributes view



Description of the four panes

This section describes the default views that are displayed in each of the four panes: the Process editor (diagram), the Attributes view, the Project Tree view, and the Outline view.

A view determines the presentation within the pane. A view can appear by itself within a pane, or can be "stacked" with other views and accessed by clicking the view's tab. Double-clicking on any of the views' tabs will maximize the view.

To see all four panes with their default views, click the **Apply 4-pane layout**



button on the main toolbar.

Process editor




The pane that contains the process diagram, called the Process editor, is the largest pane on the screen, and it is where you do most of your work. You can use the Process editor to visually compose your process flow. You can also add existing elements to a process diagram by dragging them from the Project Tree view, including the following types of elements:

- Tasks
- Processes
- Repositories
- Services

The Process editor contains two separate layouts, free-form layout and swimlane layout. The free-form layout is the initial layout when WebSphere Business Modeler is first installed, and enables you to add and position elements in any manner that you want. The swimlane layout organizes your diagram according to the characteristics of your activities. For example, if you want to quickly see all of your process tasks according to the roles in your organization, you can arrange the swimlane editor by role. Each role that you have defined will be represented as a row in the swimlane layout, and the activities performed by a role will be included in that row.

You can also use this pane to create structure diagrams for modeling your organization or to create report templates for generating reports.

Whenever you want more room for the diagram, you can reduce the number of panes shown on the screen by clicking the buttons on the main toolbar.

- Click the **Apply 1-pane layout**  button to show only the diagram.
- Click the **Apply 2-pane layout**  button to show the diagram and the Attributes view. When you click an item in the diagram, the Attributes view displays the item's details.
- Click the **Apply 4-pane layout**  button to show all four panes again.

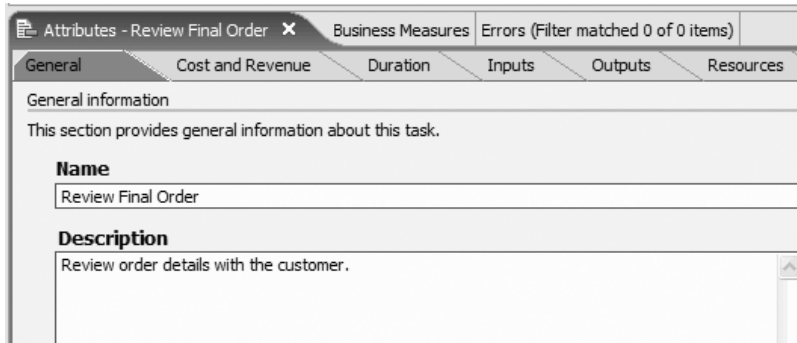
You can also maximize any view or editor by double-clicking on the view's title bar or the editor's tab.

Double-click the view or editor again to restore it to its previous size.

Attributes view

The Attributes view shows the details of any element you select in the diagram. You can click each of the tabs to see more information about the element.

The following image shows part of the Attributes view for a task called Review Final Order. To see more information about the task, you would click each of the tabs, such as **Inputs** and **Outputs**.



Elements that exist only in the diagram are called *local*. You can edit the details of these elements in the Attributes view. If the elements also exist in the Project Tree view, they are called *global* and can be used in other diagrams in the same project. You can look at the details of global elements in the Attributes view but you cannot edit them. To edit them, you would go to the Project Tree view and open the individual element.

Note that the Attributes view is the default view for this pane. The Errors view, Simulation Control Panel view, and Business Measures view also can be opened in this pane. For more information, see the help documentation.

Project Tree view

The Project Tree view provides a structured view of everything in your projects. From here, you can select elements and edit them, or you can select elements for operations such as exporting.

When you create a new item, a wizard opens that prompts you to supply a name, description, and other basic details for the item. After you have specified these values, the new item appears in the Project Tree view, and an editor appears that allows you to specify additional details about the item.

Right-click any element in the Project Tree view to open a pop-up menu that you can use to perform operations that may include copying, deleting, creating new elements, exporting, creating a simulation snapshot, analysis, reporting, or versioning.

Double-click any editable element in this view to open it in the appropriate editor.

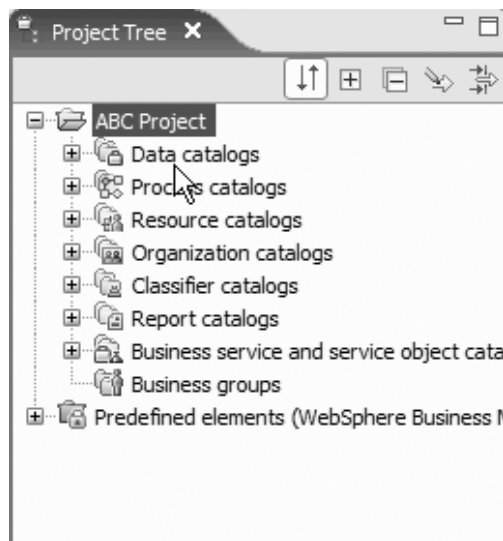
All items that you create in the Project Tree view below the level of catalogs and projects are reusable. When you create a business item, for example, you

can reuse it whenever you need to supply a data type. Similarly, a process that you create in the Project Tree view is reusable as a subprocess within other processes.

The Project Tree view uses a default structure to organize the materials that you create to represent your business. At the highest level, the Project Tree view requires that you create a project to contain the artifacts that you create. Within the project, the Project Tree view creates a library that contains folders for organizing your model elements.







Within these folders you can add your own specific catalogs, each of which holds a related set of items. You can also create catalogs within catalogs, in case you want to organize information hierarchically.

Projects typically contain business items (data), processes, resources, and organizations. The following image shows the sample ABC Project and its catalogs in the Project Tree view:



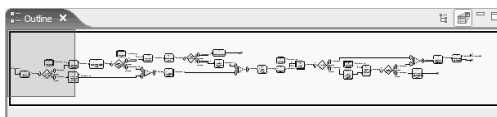
The toolbar of the Project Tree view contains the following buttons:

Button	What it does
	Sorts the items in the Project Tree view alphabetically within a container or catalog. You can turn off sorting to arrange items manually.
	Expands all branches of the Project Tree view at or under the branch you have selected.




Button	What it does
	Collapses all branches of the Project Tree view.
	Enables you to choose whether the navigation view selection is linked to the active editor. When linking is enabled, each time you change to another editor, the Project Tree view changes to show the element you are editing. Click this button to enable linking, and click it again to disable linking.
	Opens a window that you can use to select the types of items that are displayed in the tree. For example, you can choose to display only the processes and data (without the organizations or resources).
	Minimizes the view.
	Maximizes the view to a single-pane layout. To return to the previous layout, click the Restore button.
	Closes the view. To reopen the Project Tree view, click the Apply 4-pane layout button on the main toolbar.



Outline view

The Outline view displays a thumbnail of the diagram that is currently open in the Process editor. You can drag the highlighted area in the Outline view to show a different area of the diagram in the Process editor. This is a convenient function for viewing specific sections of large, complex diagrams.



The toolbar of the Outline view contains the following buttons:

Button	What it does
	Displays the process in a tree structure
	Displays the entire process diagram in a small thumbnail window. Drag the highlight box to navigate to the highlighted area in the larger diagram.
	Minimizes the view.

Button	What it does
	Maximizes the view to a single-pane layout. To return to the previous layout, click the Restore button.
	Closes the view. To reopen the Outline view, click the Apply 4-pane layout button on the main toolbar.











Palette icons











This section describes each of the icons on the palette that you can use for creating process diagrams.













Some of the icons that appear on the palette differ depending on whether you are using the original WebSphere Business Modeler style for the current diagram or the new Business Process Management Notation (BPMN) style.



















If you put the mouse pointer over an icon on the palette, you will see its name.

The following table describes each of the elements you can add from the palette.

Icon		Name	Description
		Selection tool	Makes the mouse into a selector.
		Zoom in tool	Turns the mouse into a zoom in tool.
		Zoom out tool	Turns the mouse into a zoom out tool.
		Connection tool	Turns the mouse into a connection tool.
		Annotation	A comment or note.

Icon		Name	Description
		Local task	One of the basic building blocks of the model. A task performs a function within the process. A local task is used only within this process. (Global tasks are found in the Project Tree view.)
		Local human task	An activity in which a system assigns a task to a person to do.
		Local business rules task	An activity to which business rules apply.
		Local process	An activity performed within a company or organization. A local process is used only within this process. (Global processes are found in the Project Tree view.)
		While loop	A loop that repeats a sequence of activities as long as some condition is satisfied, testing the condition at the beginning of every loop.

Icon		Name	Description
		Do-while loop	A loop that repeats a sequence of activities as long as some condition is satisfied, testing the condition at the end of every loop.
		For loop	A loop that repeats a sequence of activities a specified number of times.
		Decision	An element that routes inputs to one of two alternative outgoing paths.
		Multiple-choice decision	An element that routes inputs to one of several alternative outgoing paths.
		Merge	An element that recombines processing paths, typically after a decision.
		Fork	An element that makes copies of its input and forwards it by several processing paths in parallel.

Icon		Name	Description
		Join	An element that recombines and synchronizes parallel processing paths, typically after a fork.
		Local repository	A data store used only within this process. (Global repositories are found in the Project Tree view.)
		Map	A task that transforms data.
		Start node	A node that identifies the beginning of a process flow that is not associated with data.
		End node	A node that identifies the end of a flow within a process.
		Terminate node	A node that marks the end of a process.
		Notification broadcaster	A task that broadcasts notifications.
		Notification receiver	A task that listens for notifications.
		Observer	A task that watches for specific conditions.

Icon		Name	Description
		Timer	A task that produces output at specified times.

Adding elements from the palette

You can choose an element (such as a task) from the palette and drag it to the process diagram.

Complete the following steps:

1. Move the mouse pointer to the palette.
2. Place the pointer on the element you want and click. The icon is highlighted.
3. Move the mouse so that the pointer is on the drawing surface.
4. Click the mouse. The element you chose is dropped onto the drawing surface.
5. Type a name for the element. When you have finished typing, press the Enter key.

You have added an element from the palette.

Adding elements from the pop-up menu

Instead of using the palette, you can right-click the drawing surface at the point where you want to add an element (such as a task). A pop-up menu appears, and you can select the element you want.

Complete the following steps:

1. Move the mouse pointer to the drawing surface.
2. Press and release the **right** mouse button.
3. Move the mouse pointer to **New**.
4. Move the pointer down the menu until it is on the item you want and click. The element appears on the drawing surface.
5. Type a name for the element. When you have finished typing, press the Enter key.

You have added an element from the pop-up menu.

Context-sensitive help

You can press the F1 key to get context-sensitive help about fields, buttons, views, and check boxes.

To access context-sensitive help, put focus onto the widget you want and then press F1. The following table shows how to put focus on different types of widgets:

Widget type	How to select it
Field (for example, Name in a wizard)	Put the cursor in the field.
Button (for example, Cancel in a wizard)	Tab until the button is in focus.
List	Click an item in the list.
View or pane	Click the title bar of the view or pane.
Check box	Click the check box or use the Tab key to bring it into focus.


Pressing F1 displays some help about the widget, and usually a list of links to related information.

If you want more information, click a link to the related information. This opens the Help browser to the selected topic. Click **Show in External Window** on the toolbar to more easily view the information center.



The help system provides detailed concept, task, and reference information on the tool. The help system includes a navigation tree that shows the complete content of the information provided. You can use the tree to access individual topics.

Viewing the full table of contents

To see how the topic you have chosen fits into the Help system, click the

Show in All Topics  button on the toolbar. Clicking this button matches the Help table of contents up with the current topic.

Searching the help

If you want to find a particular piece of information in the online help, enter a query in the Search field. Click the **Search Results**  tab to display the results, and click the **Contents**  tab to return to the table of contents.

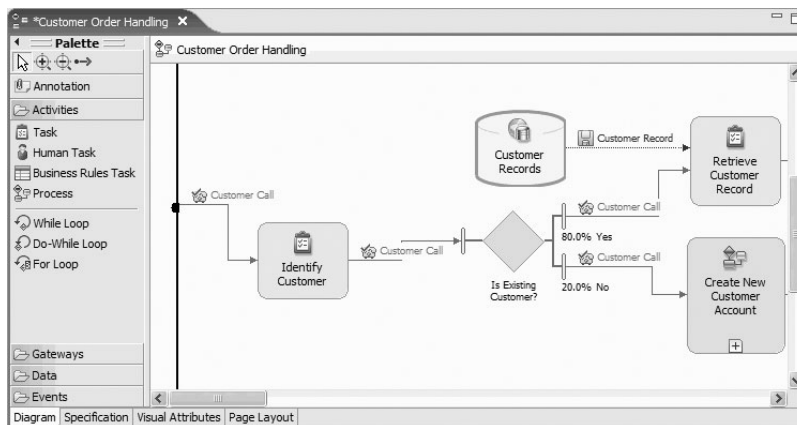
Chapter 2. Examining the editors

WebSphere Business Modeler contains a variety of editors to help you create your business models.

Process editor

The Process editor is a feature you use to graphically compose the details of a process flow.

The following screen capture shows the Process editor with process diagram open in BPMN style.



When you create a process in the Project Tree view, the tool provides a process diagram that you can use to visually compose the process flow. The process diagram is accompanied by a palette that contains the following elements that you can add to the process diagram:

- Tasks
- Processes
- Notification broadcasters
- Notification receivers
- Loops
- Decisions
- Joins
- Forks
- Merges

- Repositories
- Start, end, and terminate nodes
- Connections
- Annotations

You can also add the existing reusable elements to a process diagram by dragging them from the Project Tree view, including the following types of elements:

- Tasks, processes, repositories, services (can be dragged to the drawing surface)
- Resources, roles, organization units, locations (can be dragged onto local tasks and subprocesses)
- Business items (can be dragged onto connections and local repositories)

The process diagram defines a process flow. To define overall attributes of the process, such as its inputs and outputs, you can switch to the Specification tab for the process. To add labels to the activities in your diagram, you can switch to the Visual Attributes tab.

Process editor layouts

A process diagram can be created or opened in the free-form layout or in a swimlane layout. The free-form layout provides no restrictions on where you can place elements, although a general left to right flow is recommended. The swimlane layout sorts elements into swimlanes; each swimlane represents a certain category that you select. For example, if you choose to arrange the swimlane layout according to role, any activity that you have associated with a certain role will appear in that role's swimlane. You can arrange the swimlane layout according to any of the following elements:

- Individual resource definitions
- Bulk resource definitions
- Roles
- Classifiers
- Organization units
- Locations

Both Process editor layouts are useful for constructing and revising your process diagrams. The free-form layout provides maximum flexibility in arranging your diagram, while the swimlane editor enables you to quickly visualize your activities according to a selected category. You can switch between the process editor layouts at any time, depending on your needs. Simply right-click in the process diagram and select either **Switch to Free-Form Layout** or **Switch to Swimlane Layout By [category]**.

Definition editor

The definition editor provides the location where you can specify the attributes for most items that you create in the Project Tree view.

Instance of

Resource attributes

Attributes of the resource definition. If the resource definition is updated, refresh the table to synchronize this resource with the resource definition.

Name	Type	Minimum
profile	String	0
email	String	0
phone	String	0
employeeID	String	0
taxPayerID	String	0
fax	String	0
timezone	String	0
secretary	Staff template	0
assistant	Staff template	0
manager	Staff template	0
company	Organization te...	0
department	Organization te...	0
personId	String	1
lastName	String	1
firstName	String	0
middleName	String	0
preferredName	String	0
gender	String	0
preferredLanguage	String	0

Selected attribute values

Use this section to edit values for an attribute with a maximum occurrence greater than 1.

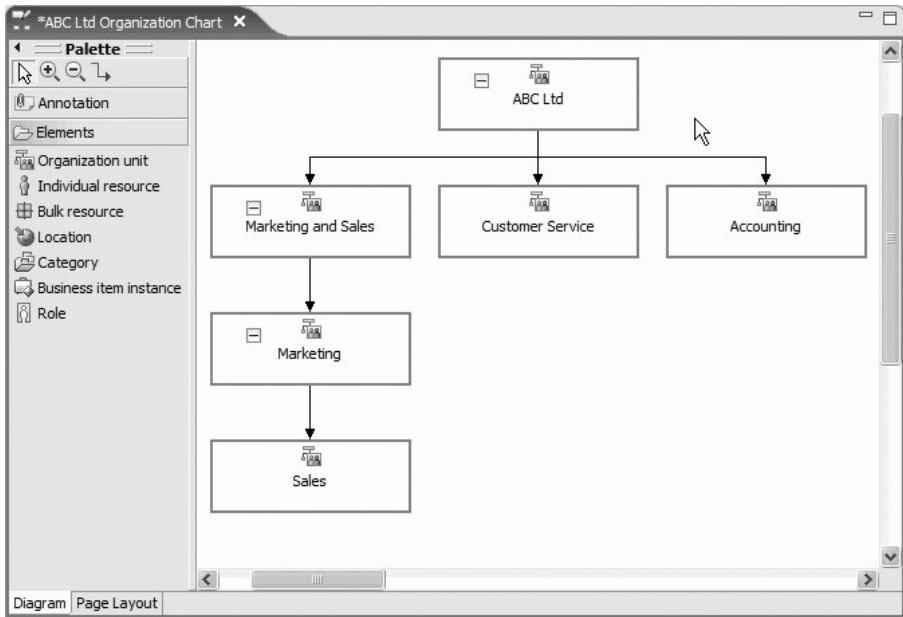
Costs | Availability | Qualifications | **Attributes** | Documentation

The set of attributes displayed by the definition editor depends on the type of element that you are creating or modifying. A definition editor is provided for each of the following elements:

- Business items, business item templates, and business item instances
- Notifications and notification templates
- Global tasks
- Global processes (on the **Specification** tab)
- Global repositories
- Services
- Resources, resource definitions, and resource definition templates
- Roles
- Timetables
- Organization units, organization definitions, and organization definition templates
- Locations, location definitions, and location definition templates

Structure editor

The structure editor is a graphical editor that you can use to model organizational structures and relationships.



You can use this editor to create structures, which define relationships between actual organizational entities. You can also use this editor to create structure definitions, which are abstract representations of relationships between different types of entities.

To open the structure editor, open a structure from the project tree, or create a new structure.

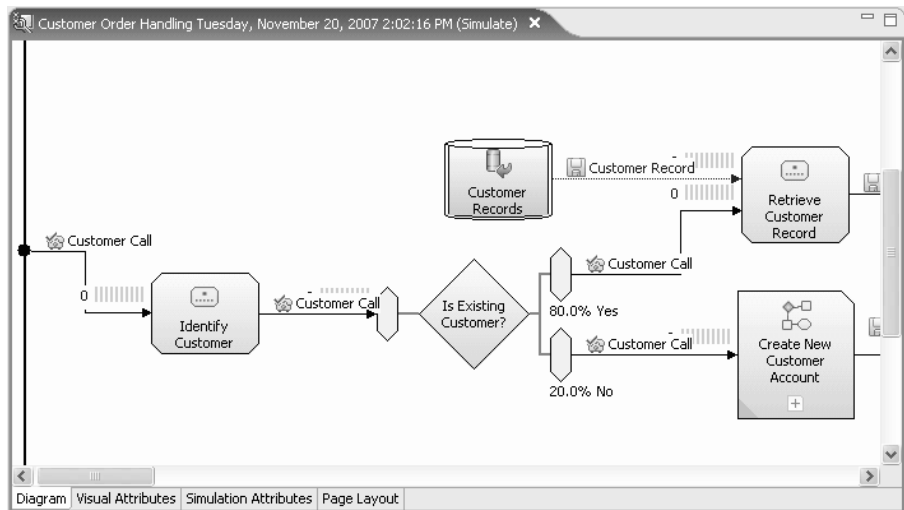
A structure diagram defines the relationship between actual entities in an organization. The structure diagram has its own palette which you can use to add the following types of elements to the diagram:

- For structures:
 - Organization unit
 - Individual resource
 - Bulk resource
 - Location
 - Category
 - Business item instance
 - Role

- Annotation
- Links
- For structure definitions:
 - Organization definition
 - Individual resource definition
 - Bulk resource definition
 - Location definition
 - Category
 - Business item
 - Annotation
 - Links

Simulation editor

You can run simulations of the processes that you model. By simulating processes you can identify weaknesses and potential improvements.



You can create one or multiple simulation profiles for each process that you create. You can then use the Simulation editor to specify attributes of the simulation profile, such as the quantity of available resources, or the number, rate, and composition of inputs to the process.

To open the Simulation editor, double-click on a simulation profile in the Project Tree view.

You can also set specific conditions such as cumulative costs for the process or an activity within it that you want to observe when the process simulation process is running.

When you have completed setting the attributes of the simulation profile, you can run, pause, and stop the simulation by clicking buttons provided in the simulation control panel. The Simulation editor now shows you an animation of how the business process actually will function. The control panel displays the process results.

By changing attributes of the simulation, you can see what effect this will have on the execution of the process. Simulations therefore provide the basis for comparative analysis of existing and proposed business processes. After you have run your simulation, you can analyze and report on the simulation results.

Chapter 3. Examining models

Become more familiar with the features and components of WebSphere Business Modeler by examining aspects of the samples that ship with the product.

Introduction to the sample projects

WebSphere Business Modeler includes three sample projects: ABC Project, ECAM (External Claims Assessor Management) Project, and Quickstart Finance.

ABC Project contains the business items, resources, and processes that might be used by any retail company accepting telephone orders from customers. It represents the activities involved in registering new customers, creating and modifying orders, applying special discounts and performing credit-based approvals. For a description of how this model was built as part of a documentation project see the ABC Company simple documentation project.

ECAM Project contains the following models of business processes that might be used by an automobile insurance company:

- Auto Claims Submission: This process identifies the activities for the reporting and submission of an automobile insurance claim.
- Auto Claims Handling: This process identifies the activities required to process an automobile insurance claim.
- Assessor Determination: This is a subprocess within the Auto Claims Handling process to identify and select an external assessor, who will be assigned to perform a damage assessment on the vehicle.
- Auto Claims Process: This process contains the Auto Claims Submission and Auto Claims Handling processes and represents the top-level process for automobile insurance claims.

Quickstart Finance is a version of the model that you will create if you complete each exercise in the Quickstart tutorial. It contains simplified processes and elements for a fictional financial services company, and is designed to introduce you to elements and methods that you will use for business process modeling. It contains the following processes:


- Loan Application (As Is): This process shows the current activities for processing a customer's application to borrow funds.
- Loan Application (To Be): Based on the as-is diagram, this process shows proposed changes to the loan application process.

To model these processes, the sample projects contains many tasks, repositories, business items, resources, and organizations.

Importing the ABC Project sample

If you have not yet imported ABC Project, you must do so before you can try any of the other steps in this section.

To import the WebSphere Business Modeler sample files, complete the following steps:

1. Open WebSphere Business Modeler. If you cannot see the Project Tree view, click the  button in the toolbar.
2. Right-click in the Project Tree view, and select **Import**.
3. Select **WebSphere Business Modeler project (.mar, .zip)**, and click **Next**.
4. Click **Browse**. The Browse for Folder window opens.
5. Navigate to the samples folder, and click **OK**.
 - On the product installation DVD or in a file set downloaded from the Internet, the samples folder is at the root of the installation DVD or file set.
 - After you install the product, the samples folder is in the directory in which WebSphere Business Modeler is installed.
6. Select the project that you want to import:
 - To import the ABC project, select the ABCProject.mar file.
 - To import the ECAM project, select the ECAMProject.mar file.
 - To import the Quickstart Finance project, select the QuickstartFinance.mar file.
7. Leave the **Include simulation snapshots** check box selected.
8. Select the **Overwrite existing objects** check box. If you leave this check box clear, you will be prompted to overwrite files during the import process.
9. Click **Finish**.
10. When the import operation completes, click **OK** in the confirmation box that appears.


The sample project that you selected is now available in the Project Tree view.

You can also download and import more advanced samples from the WebSphere Business Modeler Product Library Tutorials and Samples page.

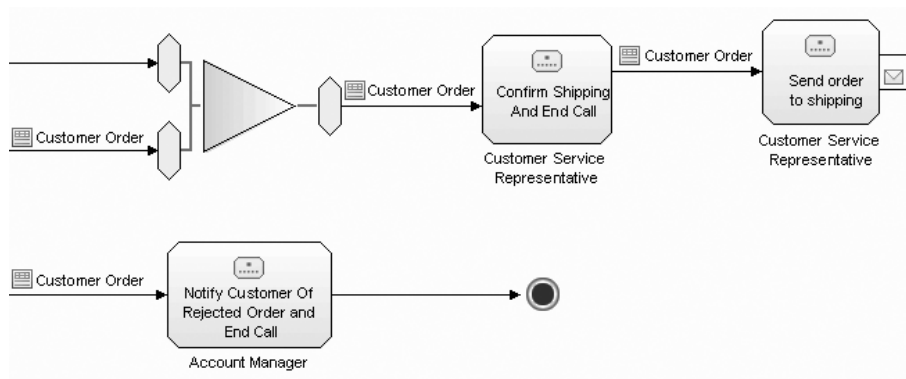
Viewing a process

You can take a closer look at one of the processes of ABC Project.

You must first have imported the ABC Project sample.

If you have not already done so, click the **Apply 4-pane layout**  button on the main toolbar to see all four panes. In the Project Tree view, double-click the Customer Order Handling process.

You will see the process diagram for Customer Order Handling. The following screen capture shows part of the process diagram:



You can see how the process works by studying the diagram. The flow of control moves through each task (such as Confirm Shipping And End Call) in turn. A Customer Order also moves from task to task through the process. A decision (Is Existing Customer?) is used to divide the flow into two different paths, depending on whether the customer is a new or returning customer. Whichever path is taken, the flow continues, and a merge is used to recombine the alternate flows.

Examining the details of an element

If you select an element in the process diagram, such as a task or decision, you can examine the details of that element.

You must first have imported the ABC Project sample and opened the diagram for the Customer Order Handling process.

In the Customer Order Handling diagram, click the Review Final Order task.

The details of the task are displayed in the Attributes view, as shown in the following image:

Attributes - Review Final Order X Business Measures Errors (Filter matched 0 of 0 items)

General Cost and Revenue Duration Inputs Outputs Resources

General information

This section provides general information about this task.

Name

Review Final Order

Description

Review order details with the customer.

You can click the tabs at the top of the Attributes view (such as **General**, **Inputs**, and **Outputs**) to view or change the details of the task.

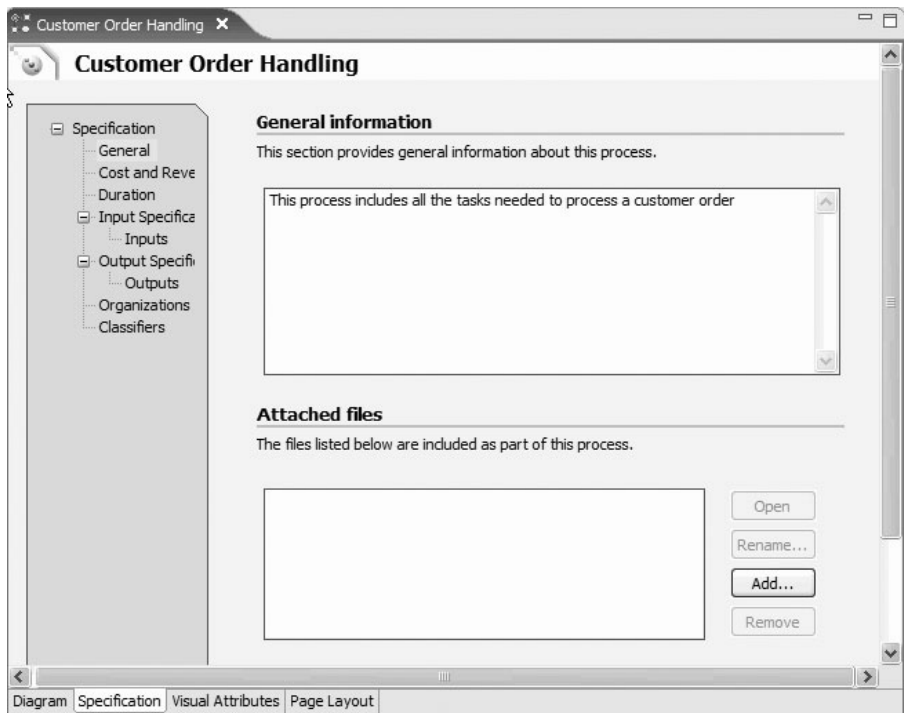
If an element exists only in the diagram (such as a decision, connection, or local task like Review Final Order), you can edit its details in the Attributes view. If the element also exists in the Project Tree view and can be used in other diagrams, you can look at its details but you cannot edit them. To edit them, you would go to the Project Tree view

Studying the process specification

You can take a closer look at how the Customer Order Handling process was specified.

You must first have imported the ABC Project sample and opened the diagram for the Customer Order Handling process.

Click the **Specification** tab (located below the diagram) to open the following Definition editor for the Customer Order Handling process:




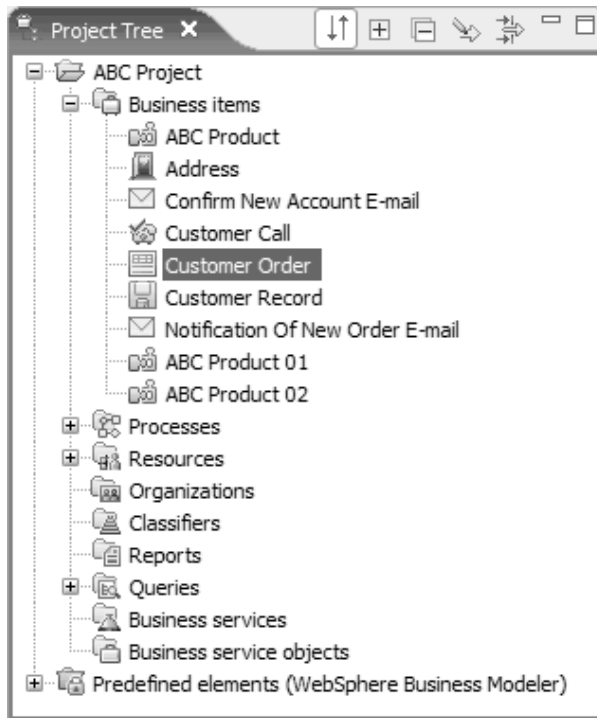
Click each of the items in the tree (such as **Inputs**) to see the details of the specification.

Viewing a business item

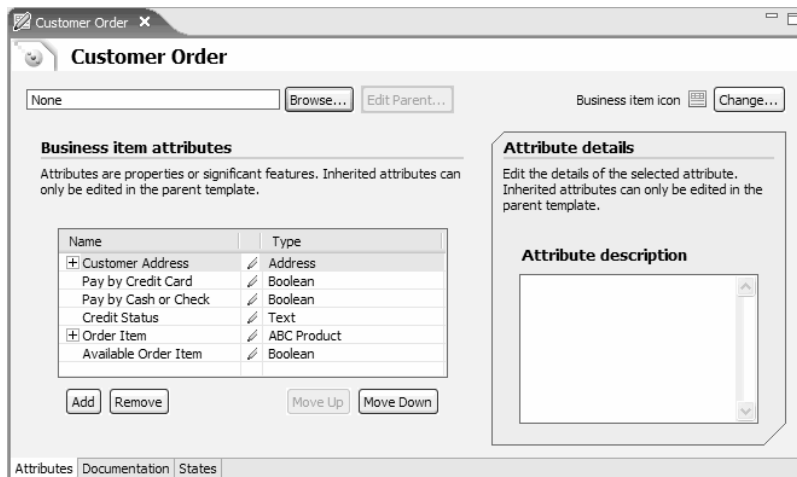
In ABC Project, the piece of data called Customer Order is being passed from one task in the process diagram to the next. This section describes how business items like Customer Order are specified.

You must first have imported the ABC Project sample.

If you have not already done so, click the **Apply 4-pane layout**  button on the main toolbar to see all four panes. In the Project Tree view, double-click Customer Order, as shown in the following image:



You will see the Definition editor for Customer Order, as shown in the following image:



You can see the attributes that define the Customer Order business item.

Chapter 4. Modeling your own process

In just a few steps, you can start modeling your own processes.

Changing modeling modes

You may want to change modeling modes based the amount of detail you want in the diagrams, element attributes, and wizards or on whether you intend to export the model to a particular format.


To change modes, complete the following steps:

1. Select **Modeling** → **Mode** on the menu bar.
2. Select the mode from the drop-down list.

You have switched to another business modeling mode. If you have switched to a less detailed mode such as Basic or switched to a more restrictive mode such as WebSphere Business Integration Server Foundation, WebSphere MQ Workflow, or WebSphere Process Server, you may notice that some options and notational elements have been disabled. For the more restrictive modes, you may also see new validation errors in the Errors view.

Using the Start Process Modeling wizard

The Start Process Modeling wizard enables you to quickly create a modeling project. When you open WebSphere Business Modeler for the first time, you see the Start Process Modeling wizard.

To open the Start Process Modeling wizard if it is not already open, click **Help** → **Start Process Modeling** on the main menu bar or click the  button on the main toolbar. This wizard helps you begin modeling by creating a project containing a process and a business item.

A project is a grouping of information related to a single work effort. Projects are shown in the Project Tree view. Projects contain the following folders to organize the models:

- Data catalogs, to hold data (business items) such as orders and invoices
- Process catalogs, to hold processes, which are representations of the activities performed in a business
- Resource catalogs, to hold resources such as employees and equipment
- Organization catalogs, to hold organization data such as organization charts and company locations


- Classifier catalogs, to hold classifiers and classifier values, which enable you to color-code your process diagram according to selected characteristics
- Report catalogs, to hold predefined reports for viewing or printing information about the project
- Query catalogs, to hold predefined queries for extracting and viewing information about the project

Creating a process


This is where you can start using WebSphere Business Modeler to model the processes that are used within a business.

Processes in WebSphere Business Modeler are representations of real-time business processes. Processes are composed of individual steps or activities, the conditions that dictate when these steps and activities occur, and the resources required for the performance or execution of the process. For example, the ABC Project sample has one main process, called Customer Order Handling, that represents the activities and resources involved in the ABC Company's customer order handling process.

To create a process, complete the following steps:

1. Click the  button on the main toolbar to open the Start Process Modeling wizard.
2. Enter the name of a project. If you have already created a project, you can use the existing name. For a new project, you may want to use the name of the company whose processes you are modeling.
3. Enter the name of a process catalog to contain the new process. If you have already created a project, you can use the name of a process catalog from that project. Some possible new names would be Customer Operations, ABC Company Processes, or CMO (current method of operation).
4. Enter a name for the new process. The name should describe what the process does, such as Invoicing, Delivery, or Customer Support.
5. Click **Next**.
6. Enter the name of a data catalog to contain business items. Possible names would be Business items or Data.
7. Enter a business item associated with the process, such as Invoice, Product, or Order. Business items are passed from one step in the process to the next, as described in "Adding data or objects to the diagram."
8. Click **Next**.

9. Select a layout for your process diagram. Free-form layout gives you the flexibility to arrange your diagram in any manner you choose. Swimlane layout organizes your diagram according to characteristics that you specify, such as Classifier or Role.
10. Click **Finish** to create the process.

If you have not already done so, click the **Apply 4-pane layout**  button on the main toolbar to see all four panes. You will see your new process in the Project Tree view.

Adding tasks to the process

After you have created a process, you can model the tasks that are part of the process.

Tasks are the basic building blocks representing activities in a process model. Each task performs some function. Visually, a task represents the lowest level of work shown in the process.

Tasks are atomic activities, in contrast to processes, which can be decomposed into another flow. For example, in the ABC Project sample, the process for creating a new customer account (represented by the local subprocess Create New Customer Account), consists of three tasks:

- Create Customer Record
- Ask Customer Security Questions
- Send E-mail To Customer Verifying Account And Security Information

To add a task to the process diagram, complete the following steps:

1. Add the task in one of the following ways:
 - Click the **Task** icon on the palette and then drag it to the process diagram.
 - Right-click the drawing surface and then click **New** → **Local Task**.

The task appears on the process diagram at the position you chose.

2. Type a name for the task and press the Enter key. Possible task names are Take Customer Call, Take Customer Order, Package Shipment, and Load Truck.

You have added a new task to the process diagram.

Add more tasks until you have added all the tasks in your process.

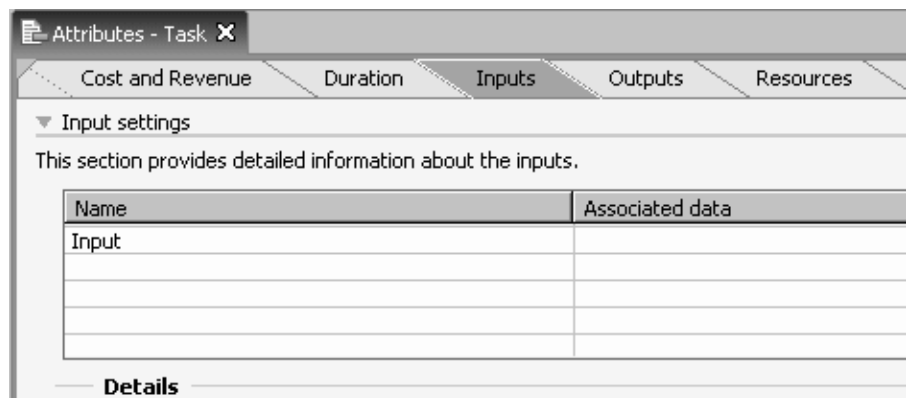
Modeling task flow through the process

You can connect tasks, subprocesses, and other elements together to model the flow of control and data through the process.

To connect tasks in the process diagram, complete the following steps:

1. On the palette, click the **Create connection** button in the palette toolbar.
2. On the diagram, click the start node.
3. Click the first task. A connection appears between the start node and the task.
4. Click the first task again. Click the second task. A connection appears between the first and second tasks.
5. Continue to connect tasks together.
6. When you are finished, press Esc to make the mouse pointer back into a selector.

If you click a task that has connections, you can inspect it in the Attributes view. For example, if you click the **Inputs** tab, you will see something like the following:



Attributes - Task X

Cost and Revenue Duration **Inputs** Outputs Resources

▼ Input settings

This section provides detailed information about the inputs.

Name	Associated data
Input	

Details

This input passes control from one task to the next. In "Adding data or objects to the diagram," you will see how to pass information from task to task.

Adding data or objects to the project


You can model any data or real objects that fit within the process. Data includes such things as information about a customer or order. Objects include such things as customer orders, products, and invoices.

In WebSphere Business Modeler, data and objects are represented with *business items*. A business item represents anything that is created, assembled,

inspected, tested, modified, or worked upon. Business items undergo changes and are passed from one process step to the next.

The ABC Project sample includes business items such as Customer Record, which holds data about a customer, and Confirm New Account E-mail, which is an e-mail message sent to a customer after they open a new account.

To add a new business item, complete the following steps:

1. If you have not already done so, click the **Apply 4-pane layout**  button on the main toolbar to see all four panes.
2. Right-click your data catalog in the Project Tree view and select **New > Business Item**. A wizard opens.
3. Enter a name for the business item, such as Order or Invoice.
4. Enter a description for the business item if you want to clarify or expand upon the name.
5. Click **Finish**. The Definition editor appears. You can now define this business item.
6. Click **Change**. Click **Select custom icon** and expand the Predefined node. When you find an icon that you like, select it and click **OK**. The icon that you chose will be associated with this business item, both in the Project Tree view and in the diagram.
7. In the Definition editor, click **Add** to add an attribute to the new business item. A new attribute appears in the table.
8. Click the **Name** field and enter a name for the attribute. Often the first attribute you enter will be called Name or ID and will be used to identify the specific instance of the business item.
9. Click the **Type** field and click the button to select the type. For this first attribute, select **Text** to make it a text attribute.

Now you have created a business item with one attribute.

See "Adding data or objects to the diagram" for instructions on adding your business item to the process flow.

Adding data or objects to the diagram

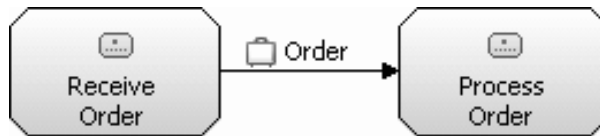
After you model data or objects as business items, you can add them to the process diagram.

By associating business items with connections, you model the passing of data or objects from one activity or task to another. For example, in the ABC Project sample, the Customer Order business item is passed between different tasks so that it can be modified, reviewed and sent to shipping.

To add a business item to the diagram, complete the following steps:

1. Right-click the connection where you want to add a business item, and click **Associate Data** on the pop-up menu. A window opens.
2. Click **Complex type**.
3. Open the project tree and the data catalog. Select the business item you created. Click **OK**.

The following image shows a business item called Order associated with a connection:



If you click one of the tasks and look at the details of its input or output in the Attributes view, you will see that the Attributes view has also changed. For example, if you click the Process order task and then click the **Inputs** tab, you will see the following:

Name	Associated data
Input	Order

The input is now associated with a business item (Order).

Next steps

Now that you have created a process, you have many options open to you.

For more detailed information about modeling, see the Quickstart Tutorial.

- You can add resources, costs, roles, and timetables, as described in the "Creating resources" module.
- You can create business items and business item instances, as described in the "Creating business items" module.
- You can add decisions and merges to your process, as described in the "Creating a simple process diagram" tutorial.

Depending on your modeling goals, you may also be interested in the following:

- Simulating the run-time process that you have modeled, to see an animated view of the process in action. For more information, see the Simulation module in the Quickstart Tutorial, or "Simulating process flows" in the online help system.
- Performing analysis of business models. See "Analyzing models" in the online help system.
- Generating reports based on simulation or analysis. See "Creating reports" in the online help system.
- Exporting business models as a basis for creating applications. See "Exporting models" in the online help system.

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Business Modeler Advanced Version 6.1.2 Getting Started

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