Notices

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Please refer to the Release Notes applicable to the particular Progress product release for any third-party acknowledgements required to be provided in the documentation associated with the Progress product.

The Release Notes can be found in the OpenEdge installation directory and online at:

For the latest documentation updates see OpenEdge Product Documentation on Progress Communities: (https://community.progress.com/technicalusers/w/openedgegeneral/1329.openedge-product-documentation-overview.aspx).

December 2014

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Preface

For details, see the following topics:

- About this documentation
- User types
- Information on documentation
- Conventions used in this manual
- Product support contact information

About this documentation

This guide is part of the documentation set for Progress OpenEdge Business Process Server.

User types

Progress OpenEdge Business Process Server is a business process management system that can be used by the following types of users:

<table>
<thead>
<tr>
<th>User type</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>User type</td>
<td>Responsibilities</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Manager</td>
<td>Responsible for automating business processes in a particular business domain. Business Process Portal's Management module serves as the primary interface to Business Process Server for the Manager, enabling the manager to monitor, analyze, and control business processes. Also uses the Business Process Modeler for modeling and simulation.</td>
</tr>
<tr>
<td>Application Developer</td>
<td>Responsible for creating customized applications for implementing business processes and developing interfaces associated with tasks. Application developers may work closely with Managers to define the requirements of an application, and determine the business processes.</td>
</tr>
</tbody>
</table>

### Information on documentation

This documentation includes information for the entire range of Progress OpenEdge Business Process Server users. In the following table, we recommend the guides that are most relevant to each type of user.

<table>
<thead>
<tr>
<th>If you are the ...</th>
<th>Read the ...</th>
</tr>
</thead>
</table>
|                    | *First Steps Guide*  
|                    | *Terminology Guide* |
| Manager            | *Business Process Portal Manager's Guide*  
|                    | *Business Process Portal User's Guide*  
|                    | *Terminology Guide* |
If you are the ... | Read the ...
--- | ---
Application Developer | Application Developer's Guide  
BP Server Developer's Guide  
BPM Events User's Guide  
Business Process Portal Manager's Guide  
OpenEdge Getting Started: Developing BPM Applications with Developer Studio  
Customization Guide  
Managed Adapters Guide  
First Steps Guide  
Terminology Guide  
Server Administrator's Guide  
Web services Developer's Guide

Business Process Server Administrator | BPM Events User's Guide  
Business Process Portal Administrator's Guide  
Business Process Portal Manager's Guide  
OpenEdge Getting Started: Installation and Configuration Guide  
Managed Adapters Guide  
Terminology Guide  
Server Administrator's Guide  
Troubleshooting Guide for Administrators

For the latest Business Process Server documentation updates, see OpenEdge Product Documentation on PSDN (http://communities.progress.com/pcom/docs/DOC-16074).

**Conventions used in this manual**

This document uses the following conventions and terminology notations.

<table>
<thead>
<tr>
<th>Convention (styles and terms)</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>bold</strong></td>
<td>Indicates titles of command buttons, check boxes, options, lists, dialog boxes, and portal page names.</td>
</tr>
<tr>
<td>file path</td>
<td>Indicates folder paths and file names.</td>
</tr>
</tbody>
</table>
### Product support contact information

If the product documentation does not provide a solution to your specific issue, or if you need clarification on the issue, then contact our Product Support team. You can contact the team through the Internet, telephone, or postal mail, as per the details provided in Table 1 on page 12.

#### Table 1: Product Support Contact Information

<table>
<thead>
<tr>
<th>To contact by</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Web site</strong></td>
<td><a href="http://progresslink.progress.com/supportlink">http://progresslink.progress.com/supportlink</a></td>
</tr>
<tr>
<td></td>
<td>If you are an existing customer, then you can log in to the above site for product support. If you are a first time user, then you need to create an account first.</td>
</tr>
<tr>
<td><strong>Telephone</strong>1</td>
<td>1-781-280-4999 for US, Latin America and Canada</td>
</tr>
<tr>
<td></td>
<td>1-781-280-4543 for the Product Support Fax Line</td>
</tr>
<tr>
<td><strong>Postal Address</strong>1</td>
<td>Progress Software Corporation</td>
</tr>
<tr>
<td></td>
<td>14 Oak Park Drive</td>
</tr>
<tr>
<td></td>
<td>Bedford, MA 01730, USA.</td>
</tr>
</tbody>
</table>

To enable us to quickly answer your questions, please provide the following information:

- Your name, installation site address and the license key for Business Process Server software.
- Your Business Process Server version and build number.

---

1 For support telephone numbers and offices in your region, visit the support web site above. This contact information is for customer support only.
• Your operating system, application server and browser, with version and service pack details, if any.

• Your database management system and version, and information on JVM and JDBC used.
First Steps Console

After installing Business Process Server, you can launch the First Steps Console and perform the initial tasks for Business Process Server. This chapter helps you to create Business Process Server Repository from First Steps Console, and also describes how to start / stop the servers, start admin consoles, and launch Business Process Server Portal from it.

For details, see the following topics:

• Launching First Steps Console
• Accessing help for First Step Console
• Preparing Business Process Server repository
• Starting servers for JBoss
• Starting Admin Consoles
• Launching Business Process Server Portal
• Stopping servers for JBoss

Launching First Steps Console

The following sections explain launching First Step Console for Windows and Unix
Launching First Steps Console for Windows

To launch First Steps Console for Windows:

1. Click **Start**.
2. Select **Programs > Progress > OpenEdge > BP Server > First Steps Console**.

The First Steps Console window appears as shown in Step Figure 1 on page 16.

Launching First Steps Console for Unix

To launch First Steps Console for Windows and Unix:

1. Go to `<OEBPS_HOME>/bin` location.
2. Run `firststeps.cmd/sh` file.

The First Steps Console window appears.

Note that the following console in Step Figure 1 on page 16 is for Embedded JBoss server. For other servers, the console content will vary.

Figure 1: First Steps Console

Accessing help for First Step Console

You can access online help by clicking the help icon. This launches the First Steps Guide in a separate window.
Preparing Business Process Server repository

You can prepare Business Process Server Repository using this option. It deletes the existing Business Process Server’s tables and recreates them. While using this option, a Business Process Server Admin User is also created.

To prepare Business Process Server repository:

1. Click Prepare Repository on the First Steps Console dialog box.

   The Prepare Business Process Server Repository dialog box appears as in Figure 2 on page 17.

   Figure 2: Prepare Business Process Server Repository

   ![Prepare Business Process Server Repository dialog box](image)

2. Click OK.


3. Click OK.

   The Successful Business Process Server Repository Preparation message box appears.

4. Click OK.

   The Business Process Server repository is created.

Starting servers for JBoss

To start Business Process Server for JBoss, you must first start the servers that are associated with your JBoss server.

Refer to Launching First Steps Console on page 15 to launch JBoss First Steps Console and refer to Preparing Business Process Server repository on page 17 to prepare repository. The First Steps Console for JBoss appears as in Step Figure 1 on page 16.

To start servers:

1. Click Start JBoss Servers in the First Steps Console.

   Confirm Starting JBoss Servers message box appears.

2. Click OK.
The JBoss, EJB and Portal servers are started.

Note: By default, BP Server and BPM Events auto startup is enabled. Therefore, Business Process Servers are started automatically along with the application servers.

3. If BP Server and BPM Events auto startup is disabled, then click **Start Business Process Servers**.
   Confirm Starting Business Process Servers message box appears.

4. Click **OK**.
   The BP Server and BPM Events server are started.

Starting Admin Consoles

Using this option for JBoss, you can start EJB Server Admin Console, Portal Server Admin Console, and BP Server Admin Console.

Starting BP Server Admin Console

To start BP Server Admin Console:

   Click **Start BP Server Admin Console**.
   The BP Server Admin Console is started.

Operations using BP Server Admin Console

Using BP Server Admin Console you can perform the following operations:

• Install applications.
• Create instances.
• Complete the tasks.
• Update the process instance data.

Starting JBoss EJB Server Admin Console

To start JBoss EJB Server Admin Console:

   Click **Start EJB Server Admin Console**.
   The **JBoss EJB Server Management Console** opens in your web browser as in Figure 3 on page 19.
Operations using EJB server Admin Console for JBoss

Using EJB Server Admin Console you can perform the following operations:

- Monitor the running server.
- Monitor resources.
- Monitor published applications.

Starting JBoss Portal Server Admin Console

To start JBoss Portal Server Admin Console:

Click Start Portal Server Admin Console.

The JBoss Portal Server Management Console opens in your web browser.

The JBoss Portal Server Management Console appears as in Figure 4 on page 20.
Operations using Portal server Management Console for JBoss

Using Portal Server Admin Console you can perform the following operations:

- Monitor the running server.
- Monitor resources.
- Monitor published applications.

Launching Business Process Server Portal

To launch Business Process Server portal:

   - Business Process Portal Login page appears.
2. Enter the User Name and Password.
3. Click Login.
   - The Home page of Business Process Portal appears.

Stopping servers for JBoss

You can stop the servers from the First Steps Console.

To stop the servers:
1. Click **Stop Business Process Servers**.
   Confirm Stopping Business Process Servers message box appears.
2. Click **OK**.
   The BP Server and BPM Events server are stopped.
3. Click **Stop JBoss Servers**.
   Confirm Stopping JBoss Servers message box appears.
4. Click **OK**.
   The JBoss, EJB and Portal servers are stopped.
Getting started

Business Process Server provides primary Web-based user interface in the form of Business Process Portal. It is a complete portal through which you can interact with Business Process Server applications.

When you log into Business Process Portal, it displays the Home module tab for all users, irrespective of your user type and your user permissions. As an application user, you can display and modify tasks assigned to you, and manage your preferences. Depending on your user type and permissions, you can view and access other module tabs namely, Management and Administration.

If you have Manager rights, then the Management module is also available to you, where you can query, report, and control processes and resources for users.

If you also have administrative rights, in the Administration module, then you can modify configuration parameters controlling Business Process Server operations, manage components, and install/uninstall applications.

Note: Though all modules are shown to you in the figures in this guide, you can view and access only those modules for which you have access rights.

Table 2: Business Process Portal modules

<table>
<thead>
<tr>
<th>Module name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>As an application User, view you tasks and instance.</td>
</tr>
</tbody>
</table>
This chapter describes how to log into and out of Business Process Portal, the screen layout, and how to explore the Home module’s interface. As the interface is uniform for all modules, this information is helpful for other modules also.

For details, see the following topics:

- Logging in to Business Process Portal
- Enabling multi-tab support
- Using themes
- Exploring Business Process Portal
- Getting support
- Accessing help
- Finding Business Process Server details
- Logging out of Business Process Portal

## Logging in to Business Process Portal

To access Business Process Portal and use it, you need to log in to it. Your Business Process Server administrator typically adds you as a new Application User, and assigns you a User Name and Password. To log in to Business Process Portal, you need to use this User Name and Password.

### To log in to Business Process Portal:

1. Start the Login page according to your platform:

<table>
<thead>
<tr>
<th>Using. . .</th>
<th>Perform the following. . .</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows 2003/XP</td>
<td>From the Start menu, choose Programs &gt; Progress &gt; OpenEdge &gt; BP Server &gt; BP Servers &gt; Start Business Process Server if you are using the installation machine (For windows only). Otherwise enter <a href="http://machine_name.domain.com:port_number/sbm/bpmportal/login.jsp">http://machine_name.domain.com:port_number/sbm/bpmportal/login.jsp</a> in your browser.</td>
</tr>
<tr>
<td>UNIX</td>
<td></td>
</tr>
</tbody>
</table>

The Login page is displayed as shown in Figure 5 on page 25.

---

### Module name | Description
---|---
**Management** | As a Manager, control your processes and resources
**Administration** | As an Administrator, configure and manage components and users.
2. Type your **User Name** and **Password**

3. Click **Login**.

Business Process Portal displays the **Task List** page. As a typical Application User, you will have access only to the Home module. Other modules to which you may have access are displayed along with Home, as additional tabs depending on your user type and user permissions.

**Tip:** You can change your password any time by using **Home > Profile**.

---

**Enabling multi-tab support**

By default, Business Process Portal does not support multi-tab browsing. So, after having logged into the Portal, if you try to login again from another tab in the browser, the first instance of the Portal becomes invalid. This might causes several unexpected issues.

To avoid any such issues, you must enable the multi-tab support for Business Process Portal by adding the following line of code to the `bpmportal.conf` file at `$DLC/oebpm/server/conf` location:

```
bpmportal.relogin.or.continue = true
```

This ensures that whenever you try to open the Business Process Portal, you are directed to any active session of the Portal, if available.

---

**Using themes**

Business Process Server provides five predefined themes for Business Process Portal and for applications in the portal. Your Business Process Server administrator can select one of them. For more details, see *Customization Guide*. 
Exploring Business Process Portal

When you log in to Business Process Portal for the first time, you can see the default Home tab, with the My Task page listing tasks assigned to you.

**Note:** Use the Profile menu to select the language you prefer and use the Preferences menu to select a filter that sets the page’s display. After configuring the Home tab, your selections are displayed the next time you log in to Business Process Portal.

Business Process Portal page layout

The terminology used for a typical Business Process Portal page is explained below. The following table describes the screen terminology used for Business Process portal.

**Table 3: Business Process Portal page terminology**

<table>
<thead>
<tr>
<th>User interface elements</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global links</td>
<td>Located at the top right corner of every page such as Support or Help, these links are available at all times during the session. It also displays the welcome message for the user who has logged in.</td>
</tr>
<tr>
<td>Module tabs</td>
<td>For your convenience, features of different modules are grouped in sections. All features of a particular group are located in its own Module tab.</td>
</tr>
<tr>
<td>Module menus</td>
<td>Each tab has a set of specific menus. At the right side, a welcome message is displayed to the user.</td>
</tr>
<tr>
<td>Page name</td>
<td>This shows the current page name.</td>
</tr>
<tr>
<td>Link trail</td>
<td>This shows the pages you navigated through to reach the current page. You can click any link in the link trail and go back to that page. If you click a link in the link trail without first saving contents of the current page, then the data in the current page is not saved.</td>
</tr>
</tbody>
</table>
User interface elements | Description
--- | ---
Workspace | Your data is displayed in this area. Generally it is displayed in one of the following ways:
• **Form**: This lets you interact with the portal. Typically, forms contain text boxes, check boxes, and options that help you enter data. Forms can be in read-only or editable mode depending upon the contents and access privileges.
• **List**: This lets you view your data in a tabular format. Typically, lists contain filter bars, search options, and page controls that manage which data is displayed and how it should be displayed.

Command buttons and Links: | The commands that help you interact with the data are represented by buttons. Buttons that help you accomplish some task but do not change the data values are typically located below the link trail. The links (for instance, My Collaborative Tasks and Next Available Task) are located above the workspace, on the right side. Buttons that operate on the data (for instance, Complete and Reassign) shown in the current page and change their values, are located below the workspace.

**Business Process Portal keyboard shortcuts**

Business Process Portal provides the following keyboard shortcuts to access its various module menus and menu options.

**Shortcuts**
The following table lists the keyboard shortcuts available in Business Process Portal.

**Table 4: Keyboard shortcuts**

<table>
<thead>
<tr>
<th>Module</th>
<th>Keys</th>
<th>Menu / Menu option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>CTRL+SHIFT+T</td>
<td>My Tasks</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+M</td>
<td>My Instances</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+S</td>
<td>Applications</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+D</td>
<td>Dashboard</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+O</td>
<td>Profile</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+F</td>
<td>Preferences &gt; Filters</td>
</tr>
<tr>
<td>Management</td>
<td>CTRL+SHIFT+I</td>
<td>Overview &gt; Instances</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+A</td>
<td>Overview &gt; Applications</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+R</td>
<td>Reports &gt; My Reports</td>
</tr>
</tbody>
</table>
### Module | Keys | Menu / Menu option
--- | --- | ---
Instance Manager > Instances | CTRL+SHIFT+N | 
Instance Manager > Tasks | CTRL+SHIFT+K | 
Instance Manager > Worksteps | CTRL+SHIFT+W | 
Balanced Scorecard > Console | CTRL+SHIFT+C | 
System > Log Viewer | CTRL+SHIFT+V | 
User Management > Users | CTRL+SHIFT+U | 
User Management > Groups | CTRL+SHIFT+G | 
User Management > Queues | CTRL+SHIFT+Q | 
User Management > Permissions | CTRL+SHIFT+P | 
User Management > Delegate Settings | CTRL+SHIFT+E | 
Applications > BP Server | CTRL+SHIFT+L | 
Applications > BPM Webflow | CTRL+SHIFT+Z |

You can customize these shortcuts by adding a new one or changing an existing one as per your requirement. For more details, see the *Customization Guide*.

### Using filter bars

A filter allows you to reduce clutter and focus on the relevant data by displaying only selected data in the workspace.

**To apply a filter using the Filter bar:**

1. Specify values by either entering text in the provided text boxes or selecting them from the lists. Figure 6 on page 28.
2. Click **Search**.

The combination of these values forms a filter.

**Figure 6: Filter bar**
Global filters
Business Process Server now provides global filters for most common filtering conditions. They are:

Filter names

• Overdue Tasks
• Tasks Due Today
• Tasks Due This Week
• Tasks Due This Month
• Tasks Due This Quarter
• Tasks Due This Year
• Critical Priority Tasks
• High Priority Tasks

*Note:* You can select a global filter as your default filter from the Home > Profile menu. Alternately, you can use it as required.

Sorting a column

In the Home module, a downward pointing triangle beside the column header indicates that the listed items can be sorted on that column header.

**To sort a column:**

1. Click the column to display the sorting options.
   Refer Figure 7 on page 29.
   **Figure 7: Sorting options - Task list page**

   ![Sorting options](image)

2. Choose the required sorting option.
   
   • A downward pointing triangle beside the column header indicates that the items are sorted in descending order. To sort them in ascending order, click the column header again.
   • An upward pointing triangle beside the column header indicates that the items are sorted in ascending order.
Note: From the Sorting options, you can choose only the required columns to be displayed and thus you can reduce the screen clutter.

The column sorting operation is performed differently in the Management and Administration modules.

- A column header is underlined only when you move the mouse over the column name.
- In the Management and Administration modules, if a column header is underlined, then you can click it to sort the listed items on that column header.

Refer Figure 8 on page 30.

Figure 8: Column sorting

Grid Search

The Grid Search Text toolbar will allow you to search and highlight the given text in the current page of the grid. And this is enabled for all portal grids.

Figure 9: Grid Search Text

- The grid searching is done locally and there will not be any remote call for it.
- The ‘Grid Search Text’ toolbar is available next to the paging toolbar of the grid by default.
- The ‘Grid Search Text’ toolbar will be refreshed on the following actions.
  - Reloading or refreshing the page.
  - While paging the grid.

Grid Toolbar Fields

- Text box
  You can enter the search text in this field. The search functionality is executed on every change of this text box, so that it is not required to click search for start the searching process. All the occurrences of the given text are highlighted and the row containing the first occurrence is selected by default. A ‘clear’ button is displayed beside the text box which enables you to clear the text box. By default, this text box supports regular expressions. Therefore, if your search conforms with the regular expression syntax, then Business Process Portal considers it as a regular expression, and searches accordingly.
- Previous Row and Next Row Buttons
These buttons are enabled only when given text is found in the grid, otherwise they are disabled. These buttons help you to navigate and select one of rows which is highlighted. Tool tips are configured to indicate the use case of these buttons.

- **Match Case check box**
  You can use the ‘Match Case’ check box to enable case-sensitive search. By default, this check box is unchecked.

- **Status Bar**
  The ‘Status Bar’ displays the number of occurrences or matches found. The icons ‘status OK’ and ‘error status’ indicate the status of the search.

**Rearranging column order**

You can change the order in which the columns are displayed as per your requirement.

**To change the order of columns:**

Drag the column header and drop it on the column header which should succeed the selected column.

The new position of the selected column is indicated by two arrows.

Whether a particular position is permissible or not is indicated by green check mark on the selected column.

Refer Figure 10 on page 31.

**Figure 10: Rearranging column order**

![Figure 10: Rearranging column order](image)

**Note:** You can change the order of columns in this way only in the Home module.

**Navigating through the list**

The paging controls allow you to navigate through pages of the current list. These controls are located immediately above and below the list.

The number of items to be displayed per page is specified by the Business Process Server administrator in the Administration module. For more details, refer to the "Using the Portal Configuration Interface" section of the *Business Process Portal Administrator’s Guide*. If the total number of items cannot be displayed in a page, then the exceeded items are displayed on the subsequent pages.

Refer Figure 11 on page 32.
Figure 11: Paging control - Task list page

Navigating through the pages in Home Module:

- **First Page** control displays the first page
- **Previous Page** control displays the previous page
- **Next Page** displays the next page
- **Last Page** displays the last page
- You can directly display a particular page by specifying its page number in the Page text box and pressing the Enter key.

You can click the **Refresh** control to reload the current page.

The top right corner of the list shows the item numbers displayed on the current page out of the total number of items.

The paging controls in the Management and Administration modules are different.
Refer [Figure 12 on page 32](#).

**Figure 12: Paging control**

In the Management and Administration modules, if the number of pages are 10 or less, then all page numbers up to the last page are displayed below the list.

Navigating through the pages in Management and Administration modules:

- You can click a page number to display the corresponding page.
- If the number of pages is more than 10, then, click
  - **Next>** helps to access the set of next 10 pages.
  - **<Previous** helps to access the set of previous 10 pages.
- The total at the far right of the paging controls represents the total number of items in the list across all pages.

**Drilling down**

If more information is available about an item in the list, then such an item is displayed with a hyperlink.

You can click the hyperlink to drill down to the next level of data and view details of that item.
Refer [Figure 13 on page 33](#).
Selecting and clearing rows

To select and clear rows:

1. Perform either of the following to select rows:
   - You can select one or more rows of items from the list of items displayed on the current page by clicking their respective check boxes in the first column.
   - To select all rows in the current page, select the check box in the header row.

   Selected rows are indicated by different color.

   Refer Figure 14 on page 33.

   Figure 14: Rows

2. Perform either of the following to clear rows:
   - To clear a particular row, click its check box again.
   - To clear all rows uncheck the header row, all selected rows in the page are cleared.
Printing

The Print icon ( ≡) displays the contents of the current page in a printable format. You can use your browser’s print feature to print it.

Getting support

If you do not find the solution to your problem in the product documentation, then you can contact the support team.

To contact Progress OpenEdge support team:

1. Click **Support** from the global links.
   
   Your default mail tool is launched to send a mail to the support team.

2. Add your query and send the mail.

Accessing help

You can access online help from the global links.

To access online help:

1. Click **Help** from the global links.
   
   The help is launched in a separate browser window.

   Business Process Portal provides context-sensitive help, displaying the help topic that is relevant to the current module.

Finding Business Process Server details

You can find out details about the Business Process Server using, **About** from the global links.

To view Business Process Server details:

1. Click **About** from the Global links.
   
   It displays the following details about Application Server, Database Type, Database Version, Business Process Server Version, and Build number in a pop-up window.

   You need this information while contacting our support team.

Logging out of Business Process Portal

You can log out of the Business Process Server using the global links.
To quit Business Process Portal:

- Click **Logout** on the global links.

After a successful logout, Business Process Portal automatically displays Business Process Portal **Login** page.
Managing Business Process Server applications

This chapter explains how to use the Administration module of Business Process Portal to manage BP Server applications, and to publish and unpublish BP Server applications as Web services.

Business Process Server provides a series of user interfaces in the Applications menu under the Administration module of Business Process Portal that enables you to manage applications.

Note: You may also publish and install Business Process Server applications using BP Server Admin, a command-oriented interface. Refer to the BP Server Developer’s Guide for a description of the most commonly used BP Server Admin commands.

Once a User or Application Developer defines a process template in Progress Developer Studio for OpenEdge, you, as a Business Process Server administrator, can publish and install the process template in the BP Server and load any associated rules into BPM Events.

When you uninstall an application, Business Process Server removes the process template from the BP Server and unloads the rules from BPM Events.

For details, see the following topics:

• BP Server applications
• Suspending and resuming applications
• Publishing BP Server applications as Web Services
• Versioning of BP Server applications
BP Server applications

At run time when an application is installed, Business Process Server copies the `<Application Server>/ebmsapps` folder to the Web application directory to make its Web pages, JSPs, images, etc. available for an application server to use (paths to the `ebmsapps` folder vary according to the application server you are using; in Embedded JBoss, for example, the path is `%OEBPS_HOME%/webapps/deploy/sbm/ebmsapps`). Once an application is uninstalled, this directory is removed.

**Note:** Before you install an application available to a specified group, ensure that the group exists in the current Business Process Server user management system.

Installing BP Server applications

To install one or more BP Server applications:

1. In the Administration module, click **Applications > BP Server**.

   The **BP Server Application** page displays current BP Server applications, as shown in Figure 15 on page 38.

   **Figure 15: Installing BP Server applications**

   ![BP Server Application page]

   2. Select a status from the Status drop-down list and click **Go**.

   This displays the applications having the selected status.

   The **BP Server Applications** page contains the following information about each application:

   - **Status**, indicating the current status of the application. Options include All, Installed, Uninstalled, Suspended, Resumed, Published, Unpublished or Deprecated.

   - **Process Template Name**, or the name assigned by the developer when defining the process template in Progress Developer Studio for OpenEdge.
• **Label**, or the name users see in Business Process Portal. The developer defines this name as the Label when designing the process template in Progress Developer Studio for OpenEdge.

• **Rule**, indicating whether the application includes rules (Yes) or has none (No). If BPM Events is not running, then Business Process Server allows you to install or uninstall applications without rules, but BPM Events must be running if you want to install/uninstall applications that contain rules.

• **Application Name**, the name of the application. Business Process Server supports versioning for applications, where a new version can be installed on an existing application. In the case of a versioned application, this displays the name of the application of which the current process template is a version.

• **Description**, providing a brief description of the application. If required, then you can define the description as a text link to a lengthier, more detailed description.

• **Migrate ACL**, select this check box, if the permissions created for other versions of this application must be migrated to the current version of the application.

3. Select the BP Server application you must install from the list, and click **Install**.

   The selected application is installed.

   You select a parent name when you install a new version over an existing version. For example, installing new template, Hiring-2 over an existing template, Hiring-1.

   **Note:** You may also install and uninstall applications in Business Process Portal. For more information, see the *Business Process Portal Administrator's Guide*.

### Uninstalling BP Server applications

**To uninstall one or more BP Server applications:**

1. Perform steps 1 and 2 outlined in **BP Server applications** on page 38.

2. Optionally, select the **Force Uninstall** check box while uninstalling a BP Server application to remove any active process instances.

3. Select the BP Server application you must uninstall from the list, and click **Uninstall**.

   Business Process Server uninstalls the selected application(s).

### Suspending and resuming applications

You may want to suspend an application if, for example, you are phasing out an outdated application, Hiring1, and installing a new application, Hiring2. By suspending Hiring1, you enable its existing process instances to remain for users to complete uninterrupted, while only new process instances may be started in Hiring2. You may also resume a suspended application if, for example, you made changes to the template of Hiring1 and you would like to resume the application.

You may also suspend and resume applications (also referred to as process templates) in BP Server Admin. Refer to the *BP Server Developer's Guide* for a description of these BP Server commands.
Suspending installed BP Server applications

You can suspend and resume installed applications only.

**To suspend one or more BP Server applications:**

1. Perform steps 1 and 2 outlined in Installing BP Server applications on page 38.
2. Select the BP Server application you must suspend from the list, and click **Suspend**.

   Business Process Server suspends the selected application(s).

Resuming suspended applications

Only suspended applications can be resumed.

**To resume one or more suspended applications, complete the following steps:**

1. Perform steps 1 and 2 outlined in Installing BP Server applications on page 38.
2. Select the suspended BP Server application you must resume from the list and click **Resume**.

   Business Process Server resumes the suspended application(s).

Publishing BP Server applications as Web Services

The Administration module of Business Process Portal enables you to publish/un publish BP Server applications as Web Services. Business Process Server Web Services also allows you to find and integrate other Web services available on the Internet into BP Server applications. Refer to the *Web Services Developer’s Guide* for more information.

**Note:** You can publish only one application at a time.

**To publish BP Server applications as Web Services:**

1. Perform steps 1 and 2 outlined in Installing BP Server applications on page 38.
2. Select the BP Server application you must publish as a Web service from the list and click **Publish**.

   The **Publish Application** page appears as shown in Figure 16 on page 41.
3. Select the methods (service operations) you want to publish from the Select Methods table.
4. Select the UDDI servers from the Select where to Publish table.

**Note:** By default only one UDDI registry is displayed. For more information about adding more registries, refer to the *Web Services Developer’s Guide*.

5. Optionally, enter a service description.
6. Click **Publish**.

Business Process Server publishes the selected application as a Web Service.

### Unpublishing BP Server application Web Services

To unpublish a BP Server Web Services application, complete the following steps:

1. Perform steps 1 and 2 outlined in *Installing BP Server applications* on page 38.
2. Select the published BP Server application you wish to unpublish from the list.
3. Click **UnPublish**.

Business Process Server unpublishes the selected published application(s).

### Versioning of BP Server applications

Versioning is helpful where your existing process template is deprecated, and the modified process template is installed with the same application name.

**Note:** You can create a new version of an existing BP Server application using Progress Developer Studio for OpenEdge.
While installing a new version of a process template from the BP Server Applications page in Business Process Portal, you can select the Migrate ACL checkbox to migrate the permissions of the existing process template to the new process template. If a similar change is required again, then you can install another new version, and deprecate all the other versions.

Whenever you need to work on any deprecated version, you must uninstall the versions created after that.

For more information about creating versions, see the OpenEdge Getting Started: Developing BPM Applications with Developer Studio.

You can remove the previous version, which is deprecated, only when all the existing instances of the deprecated application are completed. If you remove the latest (active) version, then the process template deprecated immediately before the latest version is installed automatically, and it is active.

**Note:** Versioning does not allow you to activate multiple versions simultaneously.
Using BP Server applications

In Business Process Portal, you can view the Business Process Server applications installed by your administrator and currently available to you.

For details, see the following topics:

• Viewing Business Process Server applications
• Viewing the application details
• Creating an application instance

Viewing Business Process Server applications

To view Business Process Server applications:

Click the Applications menu.

The Application page appears as shown in Figure 17 on page 44.
This page displays information about the installed Business Process Server applications that are available to you. By default, it displays all available Applications and the details of each application as listed in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application</td>
<td>Installed applications such as Approval, Hiring, and Assignment.</td>
</tr>
<tr>
<td>Description</td>
<td>Brief description of the application or a link to a page describing the application.</td>
</tr>
<tr>
<td>Information</td>
<td>Additional information or instructions, as provided in the Application Overview page in the Management module (Management &gt; Overview &gt; Applications).</td>
</tr>
</tbody>
</table>

To manage the contents of the list, you can sort the columns. To navigate through the pages, you can use the paging controls. For more details about these operations, see Exploring Business Process Portal on page 26.

### Viewing the application details

To view application details:

1. Click Applications menu.
   - The Applications page appears as shown in Figure 17 on page 44.
2. Click the application name link in the Application column, for the details you want to view.
   - The Application Details page appears as shown in Figure 18 on page 45.
Creating an application instance

To create an instance of an application:

1. In the Applications page, click the application name hyper link in the Application column, that you want to launch.
   
   The Application Details page appears as shown in the Figure 18 on page 45.

2. Enter or change the data as necessary.
   
   Depending upon the application, you can also attach, update, or remove documents associated with the application. For more details, see Business Process Portal User's Guide.

   **Note:** You can also attach a document later while working on a task of an application. For more information, see Updating tasks on page 52.

3. Click Create.
   
   This creates an instance of the current application.

   The created instances are considered as instances owned by you and are displayed in the My Instances page.

   The next chapter details how to work with application instances.
Managing your tasks

This chapter guides you to manage and work with different types of tasks. For details, see the following topics:

- Home page of Business Process Portal
- Exploring the home page
- Managing tasks
- Managing Assigned tasks
- Managing Available tasks
- Getting the Next Available task

Home page of Business Process Portal

When you log in to Business Process Portal for the first time, you will see the Tasks List page. By default, the Task Status list displays Assigned option, and the Tasks List page lists all the assigned tasks. Other options from the Task Status list display tasks that are:

- Available to you.
- Delegated and assigned to you.
- Delegated and available to you.
- Collaborated with you.
• Completed by you.

The following figure shows the Task List page listing the assigned tasks as in Figure 19 on page 48.

Figure 19: Task List page

Exploring the home page

The main menus in this page are:

• My Tasks
• My Collaborations
• My Instances
• My Alerts
• Applications
• Dashboard
• Models
• Profile
• Preferences
• Favorites

The Task List page displays the following information about your tasks (irrespective of the type) as in Table 5 on page 49.
### Table 5: Task list information

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check box</td>
<td>You can use checkbox to select a task to be completed or reassigned. The check box is displayed for all tasks.</td>
</tr>
<tr>
<td>No.</td>
<td>Displays the running number of the item in the list.</td>
</tr>
<tr>
<td>Make Re-available</td>
<td>An asterix in this column denotes that the task was originally available to the group you belong to, was assigned to you, and can be made re-available to the original group.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> This column is displayed for assigned tasks only.</td>
</tr>
<tr>
<td>Application</td>
<td>The name of the application to which the task belongs to.</td>
</tr>
<tr>
<td>Instance</td>
<td>The specific instance of the application to which the task belongs to.</td>
</tr>
<tr>
<td>Task</td>
<td>The name of the current active task, assigned to you or available to your group. This task name corresponds to the workstep name of the current application. Click the task name link to view the task details, from where you can proceed to complete or reassign the task.</td>
</tr>
<tr>
<td>Creator</td>
<td>The name of the application user who created the instance of the application.</td>
</tr>
<tr>
<td>Priority</td>
<td>The priority of the task: Low, Medium, High, or Critical.</td>
</tr>
<tr>
<td>Assigned Date</td>
<td>The date the task was assigned.</td>
</tr>
<tr>
<td>Due Date</td>
<td>The date the task is due for completion. If a task is over due, then its details are displayed in red. Additionally, a flashing red dot is shown in this column.</td>
</tr>
</tbody>
</table>

### Dataslot columns

In addition to the default columns, you can add dataslots as columns by selecting the **Tasks Column** checkbox in the Access tab of the **Dataslot properties** dialog box in Progress Developer Studio for OpenEdge. For more information, refer to the “Setting the Dataslot Access” section of the *OpenEdge Getting Started: Developing BPM Applications with Developer Studio*.

These dataslot columns are sortable; that means, you can sort the contents of this page based on this column header. For more information, see *Business Process Portal User’s Guide*. This helps to quickly locate instances based on the application-specific dataslot values.

### Viewing tasks for an application

**To view the tasks for specific application:**

1. Select the application from the **Application** drop down list.
2. Click **Search**.
Displays the tasks for that application.

Note: The Application column is not displayed when you select a specific application.

Sorting and filtering in a list

To manage the contents of the list, you can either filter or sort them. Business Process Server now provides global filters and you can make any of these filters as your default filter. For more information, see Business Process Portal User's Guide.

You can perform the following operations:

• You can use filters to list the tasks of a particular application or status or any combination of these.
• You may also apply a common or application-specific filter.

Note: Application-specific filters are displayed as options in the Filter list when you select the corresponding application in the Application list. For more information on application-specific filters, see Business Process Portal User's Guide.

Managing tasks

Business Process Server provides five types of tasks, namely:

• Assigned tasks
• Available tasks
• Delegated tasks
• Collaborative tasks
• Completed tasks

To understand the difference between these tasks, refer to Business Process Portal User's Guide.

From the Task List page, you can perform the following operations:

• View task details, as described in Viewing Assigned task details on page 51.
• Reassign the tasks to another user, as described in Reassigning tasks on page 52.
• Mark tasks completed, as described in Completing tasks on page 53.
• Make tasks re-available to the original group, as described in Making tasks re-available on page 56.
• Get the next available task as described in Getting the Next Available task on page 58.
Managing Assigned tasks

This section describes how to manage assigned tasks. You can view the details of the assigned tasks, update them, reassign them, or mark them complete.

Viewing Assigned task details

To view the Assigned task details:

1. In the Task List page, from the Task Status list, select Assigned.
2. Click Search.
   
   This displays all the tasks assigned to you as shown in Figure 19 on page 48.
3. In the Task List page, click the task name link in the Task column.
   
   The Task Details page is displayed as shown in Figure 20 on page 51.

Figure 20: Assigned Task Details Page

This page has the following command buttons:

- **Complete**: Allows you to mark the current task completed.
- **Save**: Allows you to save the changes in the current task details.
- **Reset**: Allows you to discard the changes you made in the current task details.
- **Cancel**: Allows you to discard the changes you made in the current task details and go back to the previous page.

Additionally, the Task Details page displays the following buttons, if the activity workstep (associated with this assigned task) is enabled with the associated feature in Progress Developer Studio for OpenEdge:

- **Reassign**, if enabled with reassign feature.
- **Create Collaboration** and **View Collaboration**, if enabled with collaboration feature.
- **Skip**, if enabled with skippable feature.
Updating tasks

You can modify the task and save the task details and complete it at a later time.

1. In the **Task Details** page shown in the **Figure 20** on page 51, enter or change the data as necessary.

   You can attach, update, and remove documents associated with tasks. For more details, see **Business Process Portal User’s Guide**.

   **Note:** You can also attach a document while starting an application. For more information, see **Business Process Portal User’s Guide**.

2. Click **Save**.

   Business Process Portal updates the task details, but does not mark the task as completed. The task remains in your Task List.

   **Tip:** Once a task is saved, other users with access privileges can also view the changes.

Reassigning tasks

You can reassign the task which is assigned or available to you to another person. You can do this either in the **Task List** page or in the **Task Details** page.

If you reassign an assigned task to an invalid user, then it remains assigned to you. Similarly, if you reassign an available task to an invalid user, then it remains in available state.

**Note:** You cannot reassign a task to a group.

From the Task List page

**To reassign a task from the Task List page:**

1. In the **Task List** page, select the task that you want to reassign to another user.

   If you want to reassign many tasks to the same person, then you can also choose multiple tasks.

2. Specify a user name in the **Reassign** text box.

   Alternatively, you can search for a user to whom you can assign, by clicking the Search Creator icon to locate and assign the task to another user.

   **Note:** You can reassign a task only to a single user.

3. Click **Reassign**.

   Business Process Portal reassigns the current task to the new user, but does not mark the task as completed.
The task is removed from your Task List and added in the assigned user’s Task List.

**From the Task Details page**

From the **Task Details** page, you can reassign the task only if the corresponding workstep is enabled with the reassigning feature in Progress Developer Studio for OpenEdge.

**To reassign a task from the Task Details page:**

1. In the **Task Details** page shown in the Figure 20 on page 51, enter or change the data as necessary.
2. Specify a user name in the **Reassign** text box and then click **Reassign**, as described in Step 2 and Step 3 of the previous section.

**Skipping tasks**

You can skip an assigned task, if you do not want to perform the task. This feature is available, only if the Skippable option is enabled for the corresponding workstep in Progress Developer Studio for OpenEdge. For details, refer to the “Defining Properties for Activity Workstep” section of the OpenEdge Getting Started: Developing BPM Applications with Developer Studio.

**Note:** Once you skip the task, the next task in the current process is activated.

**To skip a task:**

1. In the **Task List** page, click the task name link in the **Task** column.
   
   The **Task Details** page is displayed.
2. Review the provided task details.

**Tip:** You need not enter (or modify) any values on this page, as these updates are not available, once you skip the task.

3. Click **Skip**.

The task is removed from your Task List.

**Note:** When a skippable task is assigned to a group with the **All** option, any (or all) the group members can choose to either skip or complete the task.

**Completing tasks**

After you have finished working on a task assigned to you, you can mark it as completed. You can mark a task completed either in the **Task List** page or in the **Task Details** page.

Normally, a task assigned to a group appears as an **Available** task in the task list of all team members. The actual team member to complete the task is marked as the performer.

While this is a transparent operation, this task may still appear on the Task List of other team members until they refresh their displays. Other team members attempting to complete the same task will receive a message informing them that the task has already been completed.
Team members who open their Task List after the original user has completed the task, cannot see the task in their Task List.

**Completing tasks from the Task List page**

To mark a task completed from the Task List page:

1. In the **Task List** page, select the task that you want to mark completed. You can also choose multiple tasks.
2. Click **Complete**.

Business Process Portal marks the selected task(s) as completed. The task is removed from your Task List.

**Note:** When you mark a task as completed from the **Task List** page, you cannot update the task details.

**Completing tasks from the Task Details page**

To mark a task completed from the Task Details page:

1. In the **Task List** page, click the task name link in the **Task** column.

   The **Task Details** page is displayed.
2. Enter or change the data as necessary.
3. Click **Complete**.

Business Process Portal marks the task as completed. The task is removed from your Task List.

**Note:** For some applications, collecting runtime resource data is enabled. At run time, the resource data is included in the **Task Details** page. While completing the task, you must provide the actual time required to perform the task as the Work Time. This real-time data can then be compared to data generated during simulations.

**Collaborating tasks**

You can create collaboration for your assigned task, provided the activity workstep, associated with your task, is enabled with collaboration support at design-time in Progress Developer Studio for OpenEdge.

You can also communicate with your collaborator using E-mail or chat, provided these options are enabled in OpenEdge. For information on how to enable collaboration in worksteps, refer to the "Using Collaboration Tab" section of the **OpenEdge Getting Started: Developing BPM Applications with Developer Studio**.

The status of collaborative task varies according to any change in status of the assigned activity workstep. The following Table 6 on page 55 describes the dependency.
### Table 6: Collaborative Task Status

<table>
<thead>
<tr>
<th>Assigned Activity Workstep status</th>
<th>Collaborative Task status</th>
<th>Additional information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td>Active or Suspended or Completed or Terminated</td>
<td></td>
</tr>
<tr>
<td>Suspend</td>
<td>Suspended if active</td>
<td></td>
</tr>
<tr>
<td>Resume to activate</td>
<td>Activated if suspended</td>
<td></td>
</tr>
<tr>
<td>Complete</td>
<td>Completed if active</td>
<td>Collaborative task information is saved for reporting in Business Process Portal.</td>
</tr>
<tr>
<td>Terminate</td>
<td>Terminated if active</td>
<td>Collaborative task information is saved for reporting in Business Process Portal.</td>
</tr>
</tbody>
</table>

**Note:** Changes made to the collaboration properties of the workstep in OpenEdge are effective only to new collaboration tasks and not to existing tasks.

In the **Task List** page, all collaboration-supported tasks are marked with the 📅 icon, as shown in **Figure 21** on page 55.

**Figure 21: Assigned Task List page with Collaboration-supported tasks**

If you enable your activity workstep with all the collaboration options in OpenEdge, then the corresponding assigned task displays the following additional command buttons in the **Task Details** page as in **Figure 22** on page 56.
Making tasks re-available

Tasks available to your group with Any option, can be assigned to you by yourself or your manager. After the task is assigned to you, if you want to reassign it, you can:

- Assign the task to a particular member of your group. To reassign a task, refer Reassigning tasks on page 52.
- Make the task available to all the members of that group.

To make tasks re-available:

1. Select the tasks you want to make re-available.

   **Important:** In the Task List page, the tasks that can be made re-available are marked with an asterix in the Make Re-available column.

2. Click Make Available.

   Business Process Portal makes the task available again to the original group. It appears in the Available Tasks list for the group. The task is removed from your Task List.

Managing Available tasks

This section describes how to manage available tasks. You can view the available tasks, update them, and assign them to yourself.

To view Available tasks:

- In the Task List page, from the Task Status drop-down list, select Available.

   This displays all the tasks available to you as shown in Figure 23 on page 57.
Managing Available tasks

Figure 23: Available Tasks List Page

To view Available tasks for an application:

1. Select a specific application from the **Application** list in the Filter bar.
2. Click **Search**.

   The Available tasks for that application appears.

Viewing Available task details

To view available tasks:

In the **Task List** page, click the task name link in the **Task** column.

The **Task Details** page is displayed as shown in the following figure.

Figure 24: Available Task Details page

For information about updating and reassigning an available task, see **Updating tasks** on page 52 and **Reassigning tasks** on page 52.
Assigning tasks to self

When a task is assigned to a group with the Any option, it is available to all the members of the group. If you belong to the group, then it is available to you.

To assign the task to yourself:

1. In the Task List page, click the task name link in the Task column.
   The Task Details page is displayed as shown in the above figure.
2. Enter or change the data as necessary.
3. Click Assign to me.

   The task is assigned to you, and removed from the Available Tasks List.

Getting the Next Available task

In some special scenarios, the number of available tasks can be large, and the group size can also be very large. Since all the group members see the same list of Available tasks, there could be many conflicts when they try to choose the same task.

To manage such situations, Business Process Portal provides Next Available Task feature. When a group member chooses this option, the next available task from the list of all available tasks is assigned to this user, and removed from the Available Tasks list.

To get the Next Available Task:

   In the Task List page, click the Next Available Task link.

   The task is assigned to you and removed from the Available Tasks list.

   The Task Details page is displayed as shown in Figure 25 on page 58.

Figure 25: Next Available Task Details Page

If you do not want to work on an assigned task, then you must make this task re-available, for that you need to carry out the procedure described in Making tasks re-available on page 56.

Getting Next Available Task of an application

You can get the next available task of a specific application.
To get the Next Available Task of an application:

1. Select a specific application from the Application list in the Filter bar.
2. Click **Search**.
   
   It displays the tasks for that application.

   **Note:** The Status selection need not be Available.

3. Click **Next Available Task**.
   
   The next available task for that specific application is assigned to you and removed from the Available Tasks list.