# Table of Contents

**Preface** ......................................................................................................................... 9  
  - About this documentation ............................................................................................ 9  
  - User types .................................................................................................................... 9  
  - Information on documentation ....................................................................................... 10  
  - Conventions used in this manual .................................................................................... 11  
  - Product support contact information ............................................................................. 12  

**Chapter 1: OpenEdge Business Process Server overview** ................. 15  
  - Business Process Server components ........................................................................ 17  
  - How Business Process Server works .......................................................................... 19  
  - Business Process Server user types ............................................................................ 20  

**Chapter 2: Getting started** ................................................................. 23  
  - Logging in to Business Process Portal ......................................................................... 24  
  - Enabling multi-tab support ......................................................................................... 25  
  - Using themes ............................................................................................................... 25  
  - Exploring Business Process Portal ............................................................................. 25  
    - Business Process Portal page layout ....................................................................... 25  
    - Business Process Portal keyboard shortcuts ......................................................... 26  
    - Using filter bars ....................................................................................................... 27  
    - Sorting a column ...................................................................................................... 28  
    - Grid Search ............................................................................................................. 28  
    - Rearranging column order ...................................................................................... 29  
    - Navigating through the list ..................................................................................... 29  
    - Drilling down .......................................................................................................... 30  
    - Selecting and clearing rows .................................................................................... 30  
    - Printing .................................................................................................................. 30  
  - Getting support ........................................................................................................... 31  
  - Accessing help ............................................................................................................ 31  
  - Finding Business Process Server details ................................................................... 31  
  - Logging out of Business Process Portal ..................................................................... 31  

**Chapter 3: Basic Operations** ........................................................... 33  
  - Specifying a Date ....................................................................................................... 33  
  - Searching Users ........................................................................................................ 34  
  - Searching Group ....................................................................................................... 35  
  - Working with attachments ......................................................................................... 35
**Contents**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deleting My Filters</td>
<td>97</td>
</tr>
<tr>
<td>Delegate tasks</td>
<td>98</td>
</tr>
<tr>
<td>Delegating tasks</td>
<td>98</td>
</tr>
<tr>
<td>Managing your calendar</td>
<td>99</td>
</tr>
<tr>
<td>Selecting your calendar</td>
<td>99</td>
</tr>
<tr>
<td>Viewing your calendar</td>
<td>99</td>
</tr>
<tr>
<td>Editing your calendar</td>
<td>100</td>
</tr>
<tr>
<td>From the Calendar View page</td>
<td>100</td>
</tr>
<tr>
<td>From the Calendar Details page</td>
<td>101</td>
</tr>
</tbody>
</table>

**Glossary**

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>105</td>
</tr>
</tbody>
</table>
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>
## 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><em>file path</em></td>
<td>Indicates folder paths and file names.</td>
</tr>
</tbody>
</table>

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

---

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

---
<table>
<thead>
<tr>
<th>Convention (styles and terms)</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>italic</em></td>
<td>Indicates book titles.</td>
</tr>
<tr>
<td>monospace</td>
<td>Represents code segments or examples.</td>
</tr>
<tr>
<td>backward slash &quot;&quot;</td>
<td>Indicates the path in Windows environment. For UNIX environment, replace with forward slash &quot;/&quot;</td>
</tr>
<tr>
<td>OEBPS_HOME or %OEBPS_HOME%</td>
<td>Represents the installation folder of Business Process Server, C:\Progress\OpenEdge\oebpm\server.</td>
</tr>
<tr>
<td>STUDIO_HOME or %STUDIO_HOME%</td>
<td>Represents the installation folder of OpenEdge BPM components, C:\Progress\OpenEdge\oebpm\studio.</td>
</tr>
<tr>
<td>JBOSS_HOME or %JBOSS_HOME%</td>
<td>Represents the installation folder of JBOSS server, C:\Progress\OpenEdge\oebpm\jboss.</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 the following table.

**Table 1: Product Support Contact Information**

<table>
<thead>
<tr>
<th>To contact by</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web site</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>Telephone¹</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>Postal Address¹</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.
Progress Software Corporation is a leading global provider of automated business process management solutions. The company's product, Progress OpenEdge Business Process Server (henceforth referred to as Business Process Server or BP Server), is a comprehensive business process management platform, which enables companies to quickly transform their business processes into flexible and manageable Web applications, distributed over intranets, extranets, and the Internet.
Business Process Server addresses every stage in the business life cycle: define, integrate, publish, monitor, analyze, improve, and control. By adopting an end-to-end approach, Business Process Server incorporates all the key elements required to meet the ever-changing demands of e-business while ensuring e-business success. By providing integrated management tools, Business Process Server lets you monitor operations proactively, modifying automated processes dynamically based on changing external operations online. An overview of a typical automated business process management solutions is shown in Figure 1: Business Process Server overview on page 16.

**Figure 1: Business Process Server overview**

For details, see the following topics:

- Business Process Server components
- How Business Process Server works
- Business Process Server user types
Business Process Server components

Business Process Server is a suite of integrated components that enables you to easily build intranet, extranet, and Internet applications and manage your e-business. Business Process Server consists of the following components as in Figure 2: Business Process Server components on page 17:

Figure 2: Business Process Server components

Table 2: Business Process Server components

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Process Portal Home</td>
<td>The Home module of Business Process Portal is the primary interface for application users, enabling them to interact with Business Process Server applications. Users can complete entries to various tasks and applications, and link to the support infrastructure required to complete these tasks.</td>
</tr>
<tr>
<td>Business Process Portal</td>
<td>The Management module enables managers to query, report on, and control processes and resources, visible only to the managers.</td>
</tr>
<tr>
<td>Administration</td>
<td>The Administration module enables Business Process Server Administrators to modify configuration parameters, manage user or group access control, and install or uninstall Business Process Server applications.</td>
</tr>
<tr>
<td>Component</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Web services</td>
<td>This component allows application developers to: publish their applications as Web services, and find and convert other available Web services on the Internet into Business Process Server applications.</td>
</tr>
<tr>
<td>BPM Webflow</td>
<td>This component provides a framework for developing and implementing Web-enabled workflow applications.</td>
</tr>
<tr>
<td>Progress Developer Studio for OpenEdge</td>
<td>This is the primary application development tool for Business Process Server, which provides an Eclipse-based integrated development environment in which users can create BPM projects, processes, Web applications, and rule files.</td>
</tr>
<tr>
<td>Business Process Modeler</td>
<td>This tool is used to design templates for basic business processes, and to run simulations of processes and individual worksteps.</td>
</tr>
<tr>
<td>BP Server</td>
<td>This is a flexible, lightweight, scalable workflow process engine for intranets, extranets, and the Internet.</td>
</tr>
<tr>
<td>BPM Events</td>
<td>This open, event-driven rule engine is used to formulate and enforce policies in business applications.</td>
</tr>
</tbody>
</table>
How Business Process Server works

The following figure provides an overview of the interaction between Business Process Server components.

**Figure 3: How Business Process Server works**

The following explanations correspond to the labels shown in the above figure, and describe how the components operate.

1. Progress Developer Studio for OpenEdge and Business Process Modeler provide an integrated development environment (IDE) for Business Process Server, where you can design and publish business processes. The application developer designs a process template (with the ".spt" or ".swt" extension) in the IDE that reflects the business flow and other business process requirements. Business rules for the process template can be defined using the Rule Editor, a BPM Events component that is launched with Progress Developer Studio for OpenEdge.


3. Once the process template is defined, Business Process Server Administrators use the Administration module to install the business process on the BP Server. Administrators can also configure Business Process Server components, manage user or group access control, and publish Business Process Server applications as Web services. Once installed, users access applications through servlets that pass the requests over an RMI/IIOP connection to the BP Server within an EJB Container.
4. The EJB Container provides a runtime environment that executes and manages Java-based program components that run on the server side of a client/server network. Within the EJB Container are the BP Server and BPM Events server.

5. The BP Server writes events to event tables in the database. Each Business Process uses JDBC to connect to database server as well as store events in the database. Within the BP Server, BPM Process Store uses JDBC to connect to the database server process and retrieve the events deposited by the BP Server process. BPM Process Store interprets the events and populates the process tables. These populated tables are used by Business Process Portal modules.

6. Once the process template is installed as a Business Process Server application, application users can use the Home module to do the following:
   - Access applications
   - Obtain information to perform their tasks
   - Launch the application to start process instances from the BP Server

7. Once the process template is installed as a Business Process Server application, managers can use the Management module (if they have access privileges) to monitor execution of process instances and create reports. Servlets receive requests from managers and pass them onto the BP Server over an RMI/IIOP connection. Managers use the Report Builder to define management reports that retrieve information through JDBC to the database server.

8. BPM Events is a rule-based event or message processing server that loads application rules and executes them against the BP Server and/or external events or messages. This server persists data in the database for recovery and with the help of JDBC connects to the database.

9. Managed Adapters exchange information between Business Process Server applications and external applications by converting Business Process Server-specific protocol to the protocol of an external system such as a database or ERP system. When users add a Managed Adapter to a work step, they can define complex mapping between Business Process Server dataslots and adapter inputs or outputs of the external application. At runtime when the work step is executed, the Managed Adapter sets the adapter inputs and configuration, and maps the outputs to the appropriate output dataslots.

10. BPM Webflow is a run-time component that executes the presentation flows. This component provides a Model, View, Controller (MVC) paradigm for developing presentation flow-based applications and executing them in a Web container.

11. Business Process Servers Web services component allows BP Server applications to be published as Web services.


---

**Business Process Server user types**

There are four user types within Business Process Server, Application users, Managers, Application developers, Business Process Server administrators.

**User types**

Each Business Process Server user type is defined below:

- **Application users** — Application Users use Business Process Server applications to coordinate specific business tasks with another department within their company, with another company within their organization,
and/or with a business partner in another organization. The Home module in Business Process Portal serves as the primary interface in which Application Users run Business Process Server applications.

- **Managers** — Managers are typically experts in a particular business domain, such as quality assurance or human resources. They might need to work with managers from other groups in automating some of the business procedures that these groups share. The Management module in Business Process Portal serves as the primary Business Process Server interface for business managers to coordinate and integrate business processes, enabling them to exchange information with one another, and to share functionality over such standard communication channels as the Internet or e-mail.

- **Application developers** — Application developers are responsible for analyzing business processes and developing interfaces associated with creating tasks or processes. Application developers are often not domain experts themselves, but work closely with Managers to define business processes and determine the requirements of an application. Application developers use Progress Developer Studio for OpenEdge or Business Process Modeler to define the business process; the resulting process template file is tested, simulated, published, and run as a Business Process Server application.

- **Business Process Server administrators** — Business Process Server administrators are responsible for configuring Business Process Server components, managing user or group profiles and access control, and installing or uninstalling Business Process Server applications. The Administration module in Business Process Portal serves as the primary interface for Business Process Server Administrators to administer applications.

All Business Process Server user types can communicate by using one or more Business Process Server applications. They can also communicate with external applications.
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 3: 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 your tasks and instance.</td>
</tr>
<tr>
<td>Management</td>
<td>As a Manager, control your processes and resources</td>
</tr>
<tr>
<td>Administration</td>
<td>As an Administrator, configure and manage components and users.</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/VISTA/7/8 or 10 UNIX</td>
<td>From the Start menu, choose Programs &gt; Progress &gt; OpenEdge &gt; BP Server &gt; Admin Consoles &gt; Portal Console 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>
</tbody>
</table>

   The **Login** page appears.

2. Type your **Username** and **Password**

3. Click **Login**.

   Business Process Portal displays the **My Tasks** 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 described in the following table:

<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>
</tbody>
</table>
### User interface elements

<table>
<thead>
<tr>
<th>User interface elements</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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>
<tr>
<td>Workspace</td>
<td>Your data is displayed in this area. Generally it is displayed in lists which let 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.</td>
</tr>
<tr>
<td>Command buttons and Links</td>
<td>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.</td>
</tr>
</tbody>
</table>

### Business Process Portal keyboard shortcuts

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

#### Table 5: 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>
<tr>
<td></td>
<td>CTRL+SHIFT+N</td>
<td>Instance Manager &gt; Instances</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+K</td>
<td>Instance Manager &gt; Tasks</td>
</tr>
<tr>
<td>Module</td>
<td>Keys</td>
<td>Menu / Menu option</td>
</tr>
<tr>
<td>----------------------</td>
<td>--------------------</td>
<td>-------------------------------------</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+W</td>
<td>Instance Manager &gt; Worksteps</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+C</td>
<td>Balanced Scorecard &gt; Console</td>
</tr>
<tr>
<td>Administration</td>
<td>CTRL+SHIFT+V</td>
<td>System &gt; Log Viewer</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+U</td>
<td>User Management &gt; Users</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+G</td>
<td>User Management &gt; Groups</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+Q</td>
<td>User Management &gt; Queues</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+P</td>
<td>User Management &gt; Permissions</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+E</td>
<td>User Management &gt; Delegate Settings</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+L</td>
<td>Applications &gt; BP Server</td>
</tr>
<tr>
<td></td>
<td>CTRL+SHIFT+Z</td>
<td>Applications &gt; BPM Webflow</td>
</tr>
</tbody>
</table>

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. In the **Search Tasks** section of the **My Tasks** page, specify the required values by selecting them from the drop-down lists.
2. Click **Search**.

   The combination of these values forms a filter.
Global filters

Business Process Server provides global filters for most common filtering conditions. In the Search Tasks section, click No Filter drop-down to find the following filters:

- 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 Tasks section of My Tasks page in the Home module, a downward pointing triangle beside the each column header indicates that the listed items can be sorted on that column header.

To sort a column:

1. Click the header of a column, for example Application column, to display the sorting options.
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 few pages of the Management and Administration modules.

- A column header is underlined only when you move the mouse over the column name.
- If a column header is underlined, then you can click it to sort the listed items on that column header.

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.

- 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** — Allows you to 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** — Helps you to navigate and select one of rows which is highlighted. These buttons are enabled only when given text is found in the grid, otherwise they are disabled. Tool tips are configured to indicate the use case of these buttons.

• **Match Case check box** — Enables case-sensitive search. By default, this check box is unchecked.

• **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.

**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. If the total number of items cannot be displayed in a page, then the exceeded items are displayed on the subsequent pages.

Navigating through the pages in the **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
Chapter 2: Getting started

- **Page** text box allows you to specify a page number and directly displays the page on 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. 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.

**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.

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, click Support from the global links of the Business Process Portal to view your contact options.

Accessing help

To access online help, click Help from the global links of the Business Process Portal.

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 that you are using from the global links.


It displays details about Application Server, Database Type, Database Version, Business Process Server Version, and Build number in a pop-up window. You might need this information while contacting our support team.

Logging out of Business Process Portal

To logout from the Business Process Portal, click Logout from the global links of the Business Process Portal.

After a successful logout, Business Process Portal automatically displays the Portal's Login page.
Basic Operations

This chapter explains the basic operations you can perform while using Business Process Portal. You can perform some or all of these operations in various Business Process Portal screens. However, all these operations may not be available in each Business Process Portal screen.

For details, see the following topics:

- Specifying a Date
- Searching Users
- Searching Group
- Working with attachments

Specifying a Date

For any Date box available in Business Process Portal (for example, Due Date, Start Date, End Date), you can specify a date either by:

- Typing the date in the Date text box, or
- Selecting the date using the Select Date icon, which is generally located beside the Date text box.

To specify a date using the Select Date icon, perform the following:

1. Click the Select Date icon (選擇日期) beside the Date box for which you want to specify a date.

   The Select Date dialog box appears.
2. You can select a date by performing one or more of the following operations from the Select Date dialog box:

- To select a date from the displayed month, click the desired date. To select today's date, click Today.
- To display the calendar for another month, use the single arrows provided above the days of the week. Click the arrow pointing right for the next month, or the arrow pointing left for the previous month. Alternatively, to select any other month, you can click and hold the mouse on either of the arrows and then drag it to the desired month.
- Similarly, to display the calendar for another year, click the double-arrow pointing right for the next year, or the double-arrow pointing left for the previous year. Alternatively, to select any other year, you can click and hold the mouse on either of the double-arrows and then drag it to the desired year.
- To change the default time, click the hour and minute boxes in the Time section, to increment the value by 1 unit. Alternatively, to decrement the value, hold down SHIFT and then click the respective boxes. To change the value by multiple units, point to the respective boxes and then drag to the right to increment or to the left to decrement the value.

3. Select time from the Time drop down, which is generally located next to the the Date box.

The selected date and time is displayed in the Date box.

**Note:** By default, the Select Date dialog box displays the calendar with each week starting Sunday. To change this setting to another day of the week, click the day in the calendar header.

---

### Searching Users

For any text boxes involving users in Business Process Portal (for example, User, Performer, Creator), you can search a user by:

- Typing the user details in the User text box, or
- Selecting the user using the Select User, Edit Performer or Select Creator icon, which is generally located beside the User text box.

The following procedure applies to all three search icons mentioned above.

To search a user using the Select user icon, perform the following:

1. Click the Search User icon (🔍) is displayed beside the text box.

   The Search Users page appears.

2. You can select a user by performing one or more of the following operations from the Select User page.

   - You can search for the users by specifying either the user name, or the first name or the last name. If you specify the group name, then it searches for the users in that group, otherwise it searches in all groups.
   - After typing the user name, first name, last name, and optionally, group, click Search.

   You can also use the * as a wild card. Type in the first letter and then the asterisk (example, a*) and all users beginning with that letter will display. It also works for portions of names; e.g., type in *son and all names ending in son (Jackson, Peterson, etc.) is displayed. Type Mc*son and users such as McPherson and Mcwilliamson is displayed.
Business Process Portal lists all the users satisfying your search criteria. You can navigate through this list as explained in the Getting started on page 23

- To go directly to the list of users starting with a particular letter, click that letter in the Quick Search bar.

3. Depending on the page and current operation, Business Process Portal allows you to select one or more users. Select users by clicking the options in the first column of those users, and then click Add.

The selected users’ user names are entered in the User Name text box.

**Note:** Depending on the page and current operation, the Save and Create New button may also be available. Click this button to add the current user and continue adding more users.

## Searching Group

Searching for a group is similar to searching for a user. While searching for a group, you need to specify the group name in the Group Name box by typing it in the Search User page. Alternatively, use the Search Bar to locate the specific group by performing a procedure similar to the one explained above for searching the users.

## Working with attachments

Business Process Portal enables you to attach, update, and remove documents associated with entities such as tasks. For instance, you can use this feature to circulate a resume as a part of a hiring review process, or to circulate one or more functional specifications associated with a design approval process.

The ability to attach documents is not part of every task. The application must be designed to enable this feature, that is, it must employ Document dataslots for working with attachments.

**Note:** The ability to attach documents is not part of every task. The application must be designed to enable this feature.

### Attachment options

The Business Process Server allows you to attach documents using the JavaScript interface. Your ability to attach, update, and remove documents depends on the type of workstep that stores the document.

The possible cases are summarized in the following table:

**Table 6: Attachment Update Options**

<table>
<thead>
<tr>
<th>If the attachment is . . .</th>
<th>You can . . .</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read-only</td>
<td>View attached documents, but you cannot attach new documents, nor can you delete or update existing attached documents. You can, however, save a copy on your computer.</td>
</tr>
<tr>
<td>Read/write</td>
<td>Attach, remove, and update documents.</td>
</tr>
</tbody>
</table>
Whether an attached document is in read-only or read/write mode, depends upon the settings specified while defining the document dataslot. For more information, see the Application Developer’s Guide.

**Supported file types**

You may attach any kind of file (.doc, .xls, .pdf, .gif, .html) as long as the file is located in your computer. When you open an attachment, BPM Portal lets the browser identify the associated application.

**Note:** The default setting for document attachment size is 5 MB. In the $OEBPS_HOME\conf\bpmportal.conf$ file, you can increase the default document attachment size to 300 MB.
Introduction to the Home Module

The Home module allows you to work on your tasks and create instances of installed applications. This chapter describe the new features introduced in Business Process Server11.6, and lists the basic features of the Home module.

For details, see the following topics:

- Home Module features
- Applications with TempTable or ProDataset dataslot

Home Module features

As an Application User, the Home module presents you the following information and capabilities:

- View and manage your tasks:
  - View a list of tasks assigned to you.
  - View a list of group tasks that are available to you.
  - View a list of tasks that are delegated and assigned or available to you.
  - View a list of tasks collaborated with you.
  - Attach documents to tasks.
  - View a list of tasks based on the presentation type.
  - Complete, save, and reassign tasks that are assigned or available to you.
• For more information, refer to Managing your Tasks on page 39.

• Work with Business Process Server applications
  • Display information about applications.
  • Create application instances.
  • Monitor the status of application instances created by you.
  • For more information, refer to Working with My Instances on page 63 and Using Applications on page 59.

• Update your personal user information
  For more information, refer to Managing Profile and Favorites on page 89.

• Set your Preferences:
  • Sort and filter the displayed lists on a number of criteria.
  • Define your delegation preferences.
  • For more information, refer to Setting Preferences on page 93.

Applications with DECIMAL dataslot work with Auto-generated presentation. The component is also integrated with management pages where dataslots are rendered.

Applications with TempTable or ProDataset dataslot

BPM Portal displays Dataset dataslot and supports CRUD operations for Dataset(TempTable and ProDataSet) dataslot. Users can View, Add, Edit, and Delete records from a table. Relations between different TempTables are supported while adding or editing a record. Users can see the relation information while performing Create or Edit actions. The Create and Edit windows provide auto populated information for related columns. Child fields have an icon next to them and on clicking these icons, the relation information is displayed at the top of the window. For every child field, a dropdown list menu is shown which has values of the parent field. Users can select the input for a child field only from the available parent field values. If the current value of the child field is no longer present in the parent field, a message is displayed stating that the parent value was deleted. Users can choose to retain the same value or select any other value from the list which is available in the parent field.

Note: While adding or editing, if a parent table is empty, the dropdown list will be empty and a message is displayed stating that the parent table is empty and the Create or Edit button is disabled.

The following limitations apply to performing CRUD operations on Dataset dataslot:

• Relations are handled only at the time of adding/editing a record and not when a record is deleted. On deleting parent record, the child record remains in the table.

• Recursive relations are not handled in the UI.

• Relations are not handled if CRUD operations are performed using APIs from JS Tools or GEL Editor.
Managing your Tasks

When you log in to the Business Process Portal for the first time, the Tasks List page appears. By default, the Task Status list displays Assigned option, and the Tasks List page lists all the assigned tasks.

Note: You can manage (such as complete, save, or reassign) only the tasks with presentation type as Portal or Rollbase from Business Process Portal. Tasks with other presentation types such as Mobile, GUI, or Tablet will need to be managed using a Mobile device or GUI for .NET desktop application. For more information on defining presentation types, see the OpenEdge Getting Started: Developing BPM Applications with Developer Studio guide.

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.

For details, see the following topics:

• Task List page
• Understanding tasks
• Managing assigned tasks
• Managing available tasks
• Managing collaborative tasks
• Getting the next available task
• Managing notes

Task List page

The Task List page lists all the assigned tasks and has the following main menus:

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

The Task List page displays the following information about your tasks (irrespective of the type). Refer Table 7: Task List information on page 40.

Table 7: Task List information

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checkbox</td>
<td>The box you use to select a task to be completed or reassigned. The checkbox is displayed for all tasks.</td>
</tr>
<tr>
<td>No.</td>
<td>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>Note:</td>
<td>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>Column</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Creator</td>
<td>The name of the application user who created the task.</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>

These dataslot columns are sortable; that means, you can sort the contents of this page based on this column header. For more information, see Sorting a column on page 28. This helps to quickly locate tasks based on the application-specific dataslot values.

Business Process Server now provides global filters and you can make any of these filters as your default filter. For more information, see Global filters on page 28.

To navigate through the pages, you can use the paging controls. For more details about these operations, see Exploring Business Process Portal on page 25.

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

- View task details, as described in Viewing assigned task details on page 47.
- Reassign the tasks to another user, as described in Reassigning tasks on page 48.
- Mark tasks completed, as described in Completing tasks on page 50.
- Make tasks re-available to the original group, as described in Making tasks re-available on page 54.
- Get the next available task as described in Getting the next available task on page 57.

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

Filtering tasks

You can filter tasks using the Filter Panel and view the desired data in the workspace by using the Quick Search and Advanced Search pane. Refer to Using the Search Tasks pane on page 41 and Using the Advanced pane on page 43 for more details.

Using the Search Tasks pane

If the fields in the filter panel are not visible, then click to expand the panel.

A combination of values specified in the fields in the Search Tasks pane help you to filter a task.

Perform the following steps to search for a task using the Search Tasks pane:

1. You can search for a task using one or more of the following options.
   a) To search for a specific application, select an application from the Application drop-down list.
If the selected application has multiple versions, then you can select a version from the **Version** drop-down list.

**b)** To view task lists based on a certain workstep, select a workstep from the **Workstep** drop-down list.

**Note:** The Worksteps field is enabled only when a specific application and its version is specified.

c) To search for a task based on its status, select a task status from the **Status** drop-down list.

d) To search for tasks assigned to certain performers, select a performer from the **Performer** drop-down list.

  - If you have selected **User** or **Creator** as a performer, in the text field beside the Performer Type, then type the name of the user or creator.
  
  - If you have selected a **Queue** as a performer, then select a queue from the list beside the Performer Type.

**Note:** The Queue field is enabled only when the the status specified in the Status field is Available and Delegated Available.

e) To search for tasks based on a start date,

  - Select **Range field** from the Start Date drop-down list to specify a range of days in which tasks are started.
  
  - Select **Date field** from the Start Date drop-down list. Specify a date using the date picker icon and search. It will search and lists the tasks which are on and after the specified date and time.

f) To search for tasks based on a due date,

  - Select **Range field** from the Due Date list to specify a range of days in which the tasks are due.

**Note:** The Due Date field changes to the End Date field if the task status specified is completed.

  - Select **Date field** from the Due Date drop-down list. Specify a date using the date picker icon and search. It will search and lists the tasks which are due on and before the specified date and time.

g) You can also set other filters from the **Filter** drop-down list beside **Search**.

  - Select Global Filters, to search for tasks using OutofBox filters and filters defined by the administrator.
  
  - Select My Filters, to search for tasks using the filter definitions created by you.

h) Select a priority from the **Priority** drop-down list to search for a task based on its priority.

i) Select a presentation type from the **Presentation** drop-down list to search for a task by presentation type(s). The available presentation types are Portal, Mobile, GUI, Tablet, Other and Rollbase.

**Note:** Only the tasks with presentation type as Portal can be managed (such as complete, save, or reassign) from Business Process Portal.

2. Click **Search**.
A list of tasks based on the search is displayed in the **Task List** page.

**Tip:** You can click **Reset** to clear all the fields.

---

**Using the Advanced pane**

Using the Advanced pane, you can search for tasks using dataslots filters along with the filters mentioned in *Using the Search Tasks pane* on page 41. This section explains how to search for a task using dataslot filtering.

If you cannot view the fields in the Advanced filter pane, then click to expand the panel or click the title bar of the pane.

**Tip:** You can enlarge the filter panel by dragging the bottom edge of the Advanced pane.

To enable dataslot filtering, select a specific application containing dataslots and its version from the fields in the filter panel.

**To search for a task using dataslot filtering:**

1. If you are specifying a complex condition, such as (A OR B) & C, then select a parenthesis from the first drop-down list.
2. Select a dataslot from the dataslots **drop-down** list.
   - The dataslots available in the list are String, URL, number (long and double decimal), Date, and Boolean.
   - The dataslots that are specified for a workstep in an application are appended to the conditions defined in the filtering panel.
3. Select an appropriate mathematical operator from the operator drop-down list which can be used to compare the specified dataslot with a value.
4. In the value field, enter a value with which a data slot can be compared.
   - **Note:** The Value field is dynamic and the components in the list change with the dataslot type specified.
5. Close the parenthesis, if you have specified an opening parenthesis.
6. Optionally, in the logic field specify an AND or OR logic to combine more than one dataslot conditions.
   - To add more dataslot condition rows, click.
   - To remove dataslot condition rows, click.
   - When there exists just one dataslot condition row, click to reset all the values specified.
7. Optionally, you can click **Preview** to preview the dataslot conditions specified.
   - **Click Search** to search for tasks based on dataslot condition.
     
     A list of tasks is displayed in the **Task List** page.

**Important:** If you click the collapse button on the Advanced pane or click the title bar of the Advanced pane, then the data in the dataslot condition rows are not sent to the server as a filtering condition. Only when the pane is expanded, the dataslot conditions are sent to the server as a filtering condition.
8. Click **Reset** to clear all the fields in the filter panel.

# Understanding tasks

Business Process Server provides five types of tasks, namely:

- **Assigned tasks**
- **Available tasks**
- **Delegated tasks**
- **Collaborative tasks**
- **Completed tasks**

The difference between these tasks is as follows.

## Assigned tasks

You can be assigned tasks in any one of the following ways. For more information, see the *OpenEdge Getting Started: Developing BPM Applications with Developer Studio*.

- **Individual Static assignment**
  
  When your name is included as the performer of a task in the process template definition itself, the task is always assigned to you for any instance of the process. This is called as static assignment. The static assignment changes *only* when the process template is changed and re-installed.

- **Individual Dynamic assignment**

  Dynamic assignment occurs when the dynamic value of a dataslot is used. In the process template definition, for performer of a task, the dataslot name preceded by the @ symbol is used to display the value of the designated dataslot at run time. For example, "@Creator" as the value for "Assignee" makes the creator of the instance as the Assignee.

  **Note:** The dynamic assignment can change from instance to instance and can also reflect changes made at run time.

- **Group–All assignment**

  In the process template definition, when a task is assigned to a group with the *All* option, it gets assigned to all the members of the group. If you belong to that group, then the task is assigned to you.

- **Group–Any self-assignment**

  In the process template definition, 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. You can then assign the task to yourself.
• Group—Any manager-assignment
  In the process template definition, 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. A group member (usually the Manager or Lead) with access to the Management module, can assign the task to you.

• Bulk Assignment
  In the process template definition, a group member (usually the Manager or Lead) with access to the Management module, can bulk assign the tasks to you.

**Searching for assigned tasks**

**To search for tasks assigned to you:**

1. In the Task List page, from the Status list, select Assigned option.
2. Click Search.

All the tasks assigned to you are displayed in the Task List page.

---

**Note:** See Managing assigned tasks on page 47 for more details.

**Available tasks**

In the process template definition, when a task is assigned to a group with the Any option, it is available to, and can be performed by any member of the group. These tasks are displayed in the task list as Available tasks.

You can assign the task to yourself. Alternatively, a group member (usually the Manager or Lead) with access to the Management module, can assign the task to you.

For more information on making tasks available to a group of valid users, refer to the *OpenEdge Getting Started: Developing BPM Applications with Developer Studio*.

**Searching for available tasks**

**To search for tasks available to you:**

1. In the Task List page, from the Status list, select Available option.
2. Click Search.

All the tasks available to you are displayed in the Task List page.

---

**Note:** See Managing available tasks on page 55 for more details.

**Delegated tasks**

While some tasks are directly assigned to you or available to your group, some tasks may be routed to you by delegation. When another user chooses you as a delegate, all the tasks are routed to you during the defined delegation period and for the selected applications.
Note: For information on how to delegate a task, refer to Delegate tasks on page 98.

Delegated (Assigned)

A task is included in this list when an application user delegates it to you, and the task is in Assigned state. For example, User1 delegates the following tasks to you during a defined period for all the applications:

- Task1 is originally assigned to User1. It appears as Assigned for User1. When delegated to you, Task1 appears as Delegated (Assigned) to you.
- Task2 performer is Group1 with All option, and User1 is a member of Group1. Then Task2 appears as Assigned to User1. When delegated to you, Task2 appears as Delegated (Assigned) to you.

Searching for Delegated (Assigned) tasks

To search for tasks Delegated (Assigned) to you:

1. In the Task List page, from the Status list, select Delegated (Assigned) option.
2. Click Search.

All the tasks Delegated (Assigned) to you are displayed in the Task List page. They are handled in the same way as assigned tasks.

Note: See Managing assigned tasks on page 47 for more information.

Delegated (Available)

A task is included in this list when an application user delegates to you, and the task is in Available state. For example, User1 delegates the following task to you during a defined period for all the applications.

- Task3 performer is Group1 with Any option, and User1 is a member of Group1. Task3 then appears as Available to User1. When delegated to you, Task3 appears as Delegated (Available) to you.

Searching for Delegated (Available) tasks

To search for tasks Delegated (Available) to you:

1. In the Task List page, from the Status list, select Delegated (Available) option.
2. Click Search.

All the tasks Delegated (Available) to you are displayed in the Task List page. They are handled in the same way as Available tasks.

Note: See Managing available tasks on page 55 for more details.

Collaborative tasks

In certain cases, an application user may not be able to complete an assigned task, without collaborating with other users. For instance, in the case of BPO applications, agents working on BPO tasks must collaborate with their senior agents or clients before completing their tasks.
Collaborative tasks allows users to complete their work by collaborating with other users (or groups).
When a task performer chooses you (or your group) as a collaborator, the collaborative task appears in your Task List page.

**Searching for collaborative tasks**

*To search for collaborative tasks:*

1. In the Task List page, from the Status list, select **Collaborative** option.
2. Click **Search**.

All the tasks collaborated with you are displayed.

*Note:* See Managing collaborative tasks on page 56 for more information.

**Completed tasks**

*To search for completed tasks:*

1. In the Task List page, from the Status list, select **Completed** option.
2. Click **Search**.

All the tasks completed by you are displayed.

The Completed Tasks list shows the records maintained in BPM Process Store. Since BPM Process Store periodically purges this list, only the latest 400 records are displayed.

**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.

*Note:* Only the tasks with presentation type as Portal can be managed (such as complete, save, or reassign) from Business Process Portal.

**Viewing assigned task details**

*To view the assigned task details:*

1. In the Task List page, from the Status list, select **Assigned**.
2. Click **Search**.

   The Tasks section displays all the tasks assigned to you.
3. In the Task List page, click the task name link in the Task column.

   The Task Details page appears.
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.

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

- Modify the task details, as described in **Updating tasks** on page 48.
- Reassign the tasks to another user, as described in **Reassigning tasks** on page 48.
- Skip the task, as described in **Skipping tasks** on page 49.
- Mark the tasks completed, as described in **Completing tasks** on page 50.
- View and create collaborative tasks, as described in **Collaborating tasks** on page 51.

Updating tasks

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

**To update a task:**

1. In the Task Details page, enter or change the data as necessary.
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, available, delegated assigned or delegated 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.
Managing assigned tasks

Note: You cannot reassign a task to a group.

Reassigning tasks 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.

   **Tip:** If you want to reassign many tasks to the same person, then you can also choose multiple tasks. For more details about this operation, see Selecting and clearing rows on page 30.

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. For more information, see Searching Users on page 34.

   **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.

Reassigning tasks 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, 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.

   The task is reassigned to the specified user.

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 with any option 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 receives 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.

   Tip: For more details about this operation, see Selecting and clearing rows on page 30.

2. Click Complete. Business Process Portal marks the task 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 provided this option is enabled in Progress Developer Studio for OpenEdge. For information on how to enable collaboration in worksteps, refer to the "Defining collaboration tasks" 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 Table 8: Collaborative Task status on page 51 describes the dependency.

**Table 8: 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>Activated</td>
<td>Active or Suspended or Completed or Terminated</td>
<td></td>
</tr>
<tr>
<td>Suspended</td>
<td>Suspended if active</td>
<td></td>
</tr>
<tr>
<td>Resumed to activated</td>
<td>Activated if suspended</td>
<td></td>
</tr>
<tr>
<td>Completed</td>
<td>Completed if active</td>
<td>Collaborative task information is saved for reporting in Business Process Portal.</td>
</tr>
<tr>
<td>Terminated</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 Progress Developer Studio for 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.
If you enable your activity workstep with all the collaboration options in Progress Developer Studio for OpenEdge, then the corresponding assigned task displays additional command buttons, **Create Collaboration** and **View Collaboration**, in the Task Details page. From this page, you can perform collaboration-related operations, as discussed in the following sections.

**Create collaboration**

You can create a collaborative task for one or more collaborators. A collaborator can be an application user, a group, or both. The list of collaborators for a specific workstep is defined at design-time in Progress Developer Studio for OpenEdge. In case no collaborator is defined at design-time, you can select the collaborator from the existing list of application users. If you select a group as a collaborator, then Business Process Portal creates one collaborative task for each member of the group.

**To create collaboration:**

1. From the Task Details page, click **Create Collaboration**.
   
   The Create Collaborative Tasks page appears.

2. The Task field displays the name of the process instance, followed by the name of the main activity work step (also referred to as the parent work step) and your user name. The Collaboration page displays the priority, duration, and instructions (if any) retrieved from its parent work step.
   
   a) In the Name box, type the name of the collaborative task. This is a required field.
   
   b) In the Priority list, you can retain (or change) the priority of the task.
   
   c) In the Duration box, you can retain (or change) the duration of the collaborative task. You can specify the duration in terms of days, hours, and minutes.
   
   d) In the Escalation list, you can select any of the following escalation techniques in the case of the collaboration task timeout.

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>No escalation</td>
</tr>
<tr>
<td>Notify by Email</td>
<td>On overdue, an email is sent to the performer notifying that the task is overdue.</td>
</tr>
<tr>
<td>Complete Collaborative work item</td>
<td>On overdue, an email is sent to the performer of the activity notifying that the task is overdue.</td>
</tr>
<tr>
<td>Terminate Collaborative work item</td>
<td>On overdue, Business Process Portal terminates the collaborative task.</td>
</tr>
</tbody>
</table>

3. In the Form Display Options section, click the **Show Editable** option to display the editable dataslots from the parent work step, as editable fields in the collaborative task.

4. Click the **Show Read-only** option to display the editable dataslots from the parent work step, as read-only fields in the collaborative task. Alternatively, click the **Do not include** option to exclude all dataslots.

5. In the Instructions box, type instructions for your collaborator to follow.

6. To specify the collaborator, click the **Collaborators** tab. You can only collaborate with collaborators, who have been assigned to the parent work step, when designing the process in Progress Developer Studio for OpenEdge. The user list displays the user information of these collaborators.
7. In case no collaborator has been assigned in Progress Developer Studio for OpenEdge, you can add your own collaborator (user and group).

   • To add collaborators, click **Add** to display the **Add Users & Groups** window.
   
   Search the users or groups, as described in **Searching Users** on page 34.
   
   • Alternatively, you can click **All** in the Quick Search bar.

   This displays all the users and groups.

8. To remove one or more collaborator from the list, select its check box and then click **Remove**.

9. Click **Create** to create the collaborative task.

   Click **Reset** to discard your changes or click **Cancel** to cancel the current operation.

**View collaboration status**

You can view the status of the collaborative tasks, which you have created for this workstep, including those that have been completed.

To view the collaboration status, click **View Collaboration** in the **Task Details** page. The **View Collaboration** page appears with a list of associated collaborative tasks created by you.

The **View Collaboration** page displays the following information about each collaborative task:

**Table 9: Collaborative task list information**

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instance Name</td>
<td>The specific instance of the application to which the collaborative task belongs.</td>
</tr>
<tr>
<td>Task</td>
<td>The name of the current active task assigned to you.</td>
</tr>
<tr>
<td>Collaborative Task</td>
<td>The name of the collaborative task</td>
</tr>
<tr>
<td>Priority</td>
<td>The priority of the collaborative task: Low, Medium, High, or Critical.</td>
</tr>
<tr>
<td>Escalation</td>
<td>The escalation technique used for the task: Notify By Email, Complete Collaborative work item, or Terminate Collaborative work item.</td>
</tr>
<tr>
<td>Collaborator</td>
<td>The user name of the collaborator</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the collaborative task</td>
</tr>
<tr>
<td>Response</td>
<td>Response (if any) from the collaborator</td>
</tr>
</tbody>
</table>

To manage the contents of the list, you can sort the collaborative task list according to any column header except Response. To navigate through the pages, you can use the paging controls. For more details about these operations, see **Exploring Business Process Portal** on page 25.

Alternatively, you can view the status of all the collaborative tasks created by you, by clicking the **My Collaborations** menu. This page displays the list of all the collaborative tasks created by you. This page is the same as the **View Collaboration** page, and you can perform all the operations as described in the preceding section.

**From either of these pages:**
1. Click the collaborative task name link in the Collaborative Task column. The Collaborative Task Details page appears.

Every Collaborative Task Details page displays the Instructions and Response/Notes fields. The remaining fields represent the dataslots added to the parent workstep using Progress Developer Studio for OpenEdge. You can either review or add (or edit) the data in the dataslot fields, depending on whether they are editable or not.

2. Review the instructions you have specified for your collaborator, in the Instructions box. You cannot modify the instructions now.

3. Your collaborator can add his/her response in the Response/Note box.

4. To terminate the current collaborative task, click Terminate.

5. To discard your changes, click Reset.

6. To exit this page, click Cancel.

---

**Note:** Alternatively, you can terminate the collaborative task without adding any note. To do so, from the View Collaboration page, select the collaborative task checkbox and click Terminate.

---

### Adding notes

You can add notes to be viewed at process instance-level, for example, to be viewed by your manager. You can also view notes added by all your collaborators for this task. To perform these operations, click Notes. For details regarding notes, see Managing notes on page 70.

Additionally, you can view notes (if any) added by your manager, provided the corresponding workstep has been enabled for instance-level notes in Progress Developer Studio for OpenEdge.

---

**Note:** Alternatively, you can add and view notes from the Task Details page of the parent workstep, by clicking Notes.

---

### Sending e-mail to collaborator

You can communicate with your collaborators through e-mail.

**To send an e-mail message:**

1. From the Task Details click Email.

   The Email - Select User window appears with a list of available collaborators.

2. Select the collaborator to whom you want to send the e-mail message, and then click Send Email.

   Business Process Portal launches your default e-mail client and enters the e-mail addresses of the selected user in the recipient box.

3. Click Close this Window.

---

### 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, then you can:
Managing available tasks

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

**Note:** Only the tasks with presentation type as Portal can be managed (such as complete, save, or reassign) from Business Process Portal.

To view Available tasks:

- In the Task List page, from the Task Status drop-down list, select Available.
  
  The Tasks section displays all the available tasks.

**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 appears.
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.
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.

Managing collaborative tasks

This section describes how to manage collaborative tasks. You can view the collaborative tasks, and complete, decline, or save the task.

To view collaborative tasks, perform the following:
1. In the Task List page, from the Task Status drop-down list, select Collaborative.
2. Click Search.
   All the tasks collaborated with you appear in the Tasks section.

Viewing collaborative task details

To view collaborative task details:
1. In the Task List page, click the task name link in the Task column.
   The Collaborative Task Details page appears.

   **Note:** When Process Refresh is performed on a modified process template in Progress Developer Studio for OpenEdge, the changes are not reflected in the existing collaborative tasks of that process. For details regarding the Process Refresh feature, see Chapter 29, "Managing Changes in Processes" in OpenEdge Getting Started: Developing BPM Applications with Developer Studio.

2. Review the instructions (if any) from the collaboration creator, in the Instructions box.
3. Type your appropriate response in the Response/Note box.
   You can review or add (or edit) data in the remaining fields, depending on whether they are editable or not.
4. Click Complete to complete your collaborative task.
   This task is then removed from your Collaborative Tasks List page.
You can also perform any one of the following options, instead of completing the task.

- Click **Save** to save the changes in the current task details.
- Click **Decline** if you do not want to perform this collaborative task.
- Click **Reset** to discard the changes you have made.
- Click **Cancel** to cancel the current operation.

**Adding notes**

You can also add notes to be viewed at process instance-level, for example, to be viewed by your manager. Additionally, you can view notes (if any) added by your manager, provided the corresponding workstep has been enabled for instance-level notes in Progress Developer Studio for OpenEdge.

To do so, click **Notes**. For details regarding notes, see **Managing notes** on page 70.

**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 appears.

If you do not want to work on an assigned task, then you must make this task re-available, you must carry out the procedure described in **Making tasks re-available** on page 54.

a) Click **Complete** to complete the task. A status message appears.

- Click **Next Available Task** to work on the next task.
- Click **Back to Task List** to go to the Task List page.

b) Click **Save** to save the task. A status message appears.

- Click **Back to Task** to complete the task.
- Click **Next Available Task** to work on the next task.
- Click **Back to Task List** to go to the Task List page.

**Getting the next available task of an 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.

   a) Click **Complete** to complete the task. A status message appears.

      • Click **Next Available Task** to work on the next task.

      • Click **Back to Task List** to go to the Task List page.

   b) Click **Save** to save the task. A status message appears.

      • Click **Back to Task** to complete the task.

      • Click **Next Available Task** to work on the next task.

      • Click **Back to Task List** to go to the Task List page.

### Managing notes

You can add or view notes in the **Task Details** page if the Notes option is configured for that workstep in Progress Developer Studio for OpenEdge. In Progress Developer Studio for OpenEdge you can configure Instance-level note or Workstep-level note for each workstep.

**To manage notes:**

1. From the **Task Details** page, click **Notes**. The **Notes** window appears.

   • To add a note, type the text in the **Note** box and click **Add**.

     Your note text appears in the **Latest Note** box, along with your user name and the current date and time.

     All notes are marked with the label Note. The **Latest Note** box displays the last added note.

   • To view all notes added for the current process, click **Show All Notes**.

   • To hide all the notes in the list, click **Hide All Notes**.

2. Click **Close this Window**.
Using Applications

For details, see the following topics:

• Viewing the application
• Viewing the application details
• Creating an application instance

Viewing the application

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

To view installed Business Process Server applications:

1. Click the Applications menu.

The Application page appears with the applications that are available to you 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 Name</td>
<td>Displays the installed application name.</td>
</tr>
<tr>
<td>Version</td>
<td>Displays process template name, if the application has a label then that is displayed as process template name. In the absence of a label, then the application name is displayed.</td>
</tr>
</tbody>
</table>
### Chapter 6: Using Applications

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category</td>
<td>Displays the different type of projects as defined in Progress Developer Studio for OpenEdge.</td>
</tr>
<tr>
<td>Description</td>
<td>Brief description of the application or a link to a page describing the application.</td>
</tr>
</tbody>
</table>

2. Click on the collapsable icon next to the application, then you will get the following details:
   - Manager
   - Estimated Duration
   - Information: Additional information or instructions, as provided in the Application Overview page in the Management module (Management > Overview > Applications).

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 25.

### Viewing the application details

**To view application details:**

1. In the Applications page, click the application name link in the Application column, whose details you want to view.
   
The Application Details page appears.
   
The application name appears below the link trail. The details of the application are displayed in the workspace.

2. This page has the following command buttons:
   - **Create** — Allows you to create an instance of the current Application.
   - **Reset** — Allows you to discard the changes you made in the current Application’s details.
   - **Cancel** — Allows you to discard the changes you made in the current application details and go back to the previous page.

### Creating an application instance

**To create an instance of an application:**

1. In the Applications page, click the application name link in the Application column, that you want to launch.
   
The Application Details page appears.

2. Enter or change the data as necessary.

3. Click **Create** to launch 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.
Working with My Instances

Your Business Process Server Administrator makes an application available to you, by installing it through the Administration module. However, in order to use the application, you must create an instance of the application, also referred as application instance.

When you create application instances in Business Process Portal, these instances are owned by you and are displayed in the My Instances page.

**Important:** Changes made in the application instance do not impact the original application template, installed by your administrator.

For details, see the following topics:

- Viewing instances
- Viewing process status
- Printing Tabular view
- Managing worksteps
- Viewing instance history using audit trail
- Removing your instances
Viewing instances

Click the **My Instances** menu. The **My Instances** page appears with the following information about each application as listed in Table 10: **My Instances list information** on page 64:

<table>
<thead>
<tr>
<th>Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application</td>
<td>The name of the application.</td>
</tr>
<tr>
<td>Instance</td>
<td>The specific instance of the application.</td>
</tr>
<tr>
<td>Task</td>
<td>The name of the current active task.</td>
</tr>
<tr>
<td>Performer</td>
<td>The name of the user or group, which is currently working on the specified task of the application. Click the performer link to send an e-mail to the performer of the task.</td>
</tr>
<tr>
<td>Details</td>
<td>Displays the following icons:</td>
</tr>
<tr>
<td></td>
<td>• Click the <strong>PSV Tabular View</strong> icon ( ) to display the tabular view of the Process Status Viewer for the application.</td>
</tr>
<tr>
<td></td>
<td>• Click the <strong>PSV Flow View</strong> icon ( ) to display the flow view of the Process Status Viewer for the application.</td>
</tr>
<tr>
<td></td>
<td>• Click the <strong>Audit History</strong> icon ( ) to display the <strong>Instance History</strong> page for the application.</td>
</tr>
<tr>
<td>Priority</td>
<td>Priority level of the workstep. It can be 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 overdue, then the entire task details row is displayed in red. Additionally, a flashing red dot is shown in this column.</td>
</tr>
</tbody>
</table>

**Note:** You need the requisite permission to see the Process Status Viewer. For more details, see *Business Process Portal Administrator’s Guide*.

To manage the contents of the list, you can filter and sort them. You can use filters to list the instances of a particular application, of a particular version, of a particular priority, of a particular due date, or any combination of these. Additionally, you may apply common or application-specific filter. You can also sort the list according to the application, instance name, performer, priority, assigned date, or due date. To navigate through the pages, you can use the paging controls. For more details about these operations, see *Exploring Business Process Portal* on page 25.

From the **My Instances** page, you can perform the following operations:

- View the process instance status as a flowchart or table, as described in *Viewing process status* on page 65.
• View the audit history information of the process instance, as described in Viewing instance history using audit trail on page 73.

• Remove process instances, as described in Removing your instances on page 75.

### Viewing process status

You can see the process status in two modes; either in a tabular view or in a flow view. Both these views represent the same data and allow you to perform the same operations. Select the Auto Refresh check-box to refresh the task details in both the views.

**Note:** The Auto Refresh check-box is displayed only if a process is incomplete.

### Viewing workstep status in Tabular view

In the My Instances List page, click the PSV Tabular View icon ( ) to display the process status view of the specific application in the form of a table.

Alternatively, in the flow view of the Process Status Viewer page, click the Tabular View link to display the process status view of that application in the form of a table. The Process Status View page is displayed with worksteps in tabular format.

The name of the process instance is displayed below the link trail.

The Tabular View displays the Start workstep as the first workstep at the top of the list. It is followed by the completed worksteps ordered by the completion time. They are followed by the activated worksteps, and then suspended worksteps sorted on activation time. The End workstep is displayed as the last workstep.

The workstep status is marked in the table. It also uses color coding as explained in Table 11: Workstep color coding on page 66.

You can click Show All to view the work item details for that workstep. Depending on the current status of the workstep, you can change some of its details. These details are explained in the Table 12: Managing worksteps on page 70. To view the work item details for all worksteps in the process, you can use the Print icon ( ) provided in the Tabular View page. For details, refer to Printing Tabular view on page 66.

From the Tabular View page:

• View process status in a flow view, as described in Viewing workstep status in Flow view on page 66.

• Update Worksteps and Workitems, as described in Updating worksteps and workitems in Tabular view on page 71.

• View/update the dataslots, as described in Managing dataslots on page 69.

• View the audit history information of the current process instance, as described in Viewing instance history using audit trail on page 73.

This page has the following command buttons:

• **Save** — Allows you to save the changes in the current process instance.

• **Reset** — Allows you to discard the changes you made in the current process instance.

• **Cancel** — Allows you to discard the changes you made in the current process instance and go back to the previous page.
Printing Tabular view

From the Tabular View page, you can view and print the work item details of all the current worksteps in the process.

To print Tabular view:

1. Click the Print icon ( ) provided in the Tabular View page.
   - This displays the Process Status Viewer window, where you can view the work item details of all the current worksteps.
2. You can now proceed to print the current view, using the Print functionality in your browser.

Viewing workstep status in Flow view

In the My Instances List page, click the PSV Flow View icon ( ) to display the process status view of the specific application in the form of a flowchart.

Alternatively, in the tabular view of the Process Status Viewer page.
Click the Chart View link to display the process status view of that application in the form of a flowchart.

The process instance name is displayed below the link trail.

The workstep color coding indicates its status as explained in the following Table 11: Workstep color coding on page 66.

Table 11: Workstep color coding

<table>
<thead>
<tr>
<th>Workstep Color. . .</th>
<th>Indicates. . .</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orange</td>
<td>Activated workstep</td>
</tr>
<tr>
<td>Green</td>
<td>Completed workstep</td>
</tr>
<tr>
<td>Gray</td>
<td>Inactive workstep</td>
</tr>
<tr>
<td>Blue</td>
<td>Skipped workstep</td>
</tr>
<tr>
<td>Red</td>
<td>Suspended workstep</td>
</tr>
<tr>
<td>Dark Green</td>
<td>Monitoring workstep in wait state.</td>
</tr>
</tbody>
</table>

From the Flow View page, you can perform the following operations:

- Update Worksteps and Workitems, as described in Updating worksteps and workitems in Flow view on page 67.
- View the events, as described in Using Event Playback on page 68.
- Print the current Flow View, as described in Printing Flow View on page 69.
- Export the current Flow View, as described in Exporting Flow View on page 69.
• Modify the process instance template, as described in Updating process instance template in Flow view on page 71.
• View process status in a tabular view, as described in Viewing workstep status in Tabular view on page 65.
• View/update the dataslots, as described in Managing dataslots on page 69.

Updating worksteps and workitems in Flow view

You can dynamically update worksteps and workitems of a process instance.

To update worksteps and workitems of a process instance:

1. From the Flow View page, click any completed (green), active (orange) or suspended (red) workstep from the flowchart to open the Workstep Details window.

   Note: The Workstep Details window for a completed or a skipped workstep displays only read-only data. You cannot perform any action other than sending an e-mail to the workstep performer.

   Active worksteps display the Workstep Details window with editable fields, where you can update certain workstep and work item properties.

2. To send an e-mail to the performer(s), click the Performer link.

   Business Process Portal launches your default e-mail client and enters the e-mail addresses of the performer(s). If there are multiple performers comprising any combination of list of users and list of groups, then Business Process Portal enters individual e-mail addresses of those users and group members.

   Note: If a group contains users and another group, then Business Process Portal enters e-mail addresses of only the users but does not enter e-mail addresses of the nested group’s members.

3. To dynamically modify an active workstep or a work item during run-time:

   • From the Details tab, select the priority from the Priority list to update the workstep’s priority.
   • Click the Workitem(s) tab. Update the workstep performer in the Performer box or click to open the User List page, where you can select a valid user from the list of application users. Update Action information by selecting an option from the provided list in the Action column.
   • Click the Dataslots tab. Type comments in the Comments box. You can also change the default due date in the DueDate box.
   • Click the Audit History tab to view the audit history information of this workstep.

   Note: You can also view the audit history information of all the worksteps in the process instance. For more details, refer to Viewing instance history using audit trail on page 73.

4. Additionally, depending on the workstep status, you can perform the following operations:

   • To suspend an active workstep, click Suspend Workstep. This action changes the workstep color to red, and temporarily stops the process at the suspended workstep until the issue causing the suspension is resolved or you resume workstep execution.
   • To resume a suspended workstep, click Resume Workstep. This action changes the workstep color back to orange, and reactivates the workstep.
• To complete an active workstep, click **Complete Workstep**. This action changes the workstep color to green. Business Process Portal takes a while to mark the workstep as completed and change its color. Therefore, you must refresh the screen more than once to reflect the color change.

**Note:** If the Completed workstep has been designated as a Rollback Point (that is, then it is the workstep from which the work flow is restarted if the process fails during execution), a Rollback button is displayed in the Workstep Details window. Click **Rollback** to roll back the process to the rollback point. For more information on rollback, see “Using the Rollback Process” in the *OpenEdge Getting Started: Developing BPM Applications with Developer Studio*.

5. Click **Save** to save any changes you made in the **Workstep Details** page.

Business Process Portal automatically reloads the Flow View.

Click **Reset** to discard the changes and return to the original settings. Click **Cancel** to cancel the operation and close the current window.

**Using Event Playback**

The Event Playback feature helps you to view the events in the order in which they have occurred.

The event playback helps you to view the events, based on the workstep states. It covers the following workstep states.

- Activation
- Completion
- Suspension
- Skipped

Based on the workstep status for each event, it changes the fill colors of the respective worksteps inside the Flow View with a delay of 500 milliseconds.

The Flow View displays the following controls in the Legend Bar to use this feature.

- **Previous Step:** Click the Previous Step icon (◀) to go back one workstep at a time from the point where the playback was stopped.

- **Auto Play:** Click the Auto Play icon (▶), to start the event playback. The events are processed sequentially.

- **Stop Auto Play:** Click the Stop Auto Play icon (⏹) to stop the playback at any point of time.

- **Next Step:** Click the Next Step icon (▶️) to step forward one workstep at a time from the point where the playback was stopped.

How the worksteps changed states is displayed in an animated way in this feature.

The data required for this event playback is taken from BPM Events table. Therefore, you can use this features long as the data in the BPM Events is not archived. If the data has been archived for a particular instance, then it displays an appropriate message.

**Note:** The Event Playback feature is available only in the Flow View and not in the Heatmap.
Printing Flow View

To print the Flow View:

1. Use the Zoom in and Zoom out icons to specify the size for the Flow View.
   Business Process Portal prints the Flow View using the zoom level you have selected.

   **Note:** You can use the zoom feature to print the entire Flow View in a single page. This can be used for the Flow View and Heatmap.

2. Click the **Print** icon (打印机) to open the **Print** dialog box.
3. Specify the appropriate settings, and click **Print** to directly print the current Flow View.
   The Flow View is printed with a page title and page number.
   It also provides the following details in the printed page:
   - Process Instance Status
   - Priority
   - Creator
   - Start Date
   - Due Date

Exporting Flow View

You can save the current process instance template diagram in a PDF format using the print functionality.

**To save as PDF:**

1. Click the **Print** icon to open the **Print** dialog box.
2. Select Adobe PDF as your printer.
3. Specify an appropriate directory and a filename, and click **Print**.
   Saves the current Flow View in PDF format.

Managing dataslots

In the Flow View or Tabular View page, click **View Dataslots**.

The **View Dataslots** page appears with the dataslot information for the current application instance. Additionally, you can view process instance-level notes entered by other users, as well as add your own notes.

The name of the process instance is displayed below the link trail.

You can enter or change the data as necessary.

This page has following command buttons:

- **Notes** — See Managing notes on page 70.
- **Save** — Allows you to save the changes in the current process.
- **Reset** — Allows you to discard the changes you made in the current process.
Managing notes

You can add and view notes for the current process instance. Additionally for processes with collaboration support, you can view notes added by task performers, who create collaborative tasks, and by collaborators.

To manage notes:

1. From the View Dataslots page, click Notes.
   
   The Notes window appears with the last added note (if any) in the Latest Note box.

2. You can perform one or more of the following options:

   a) To add a note, type your note in the Note box and click Add.

   Your note text appears in the Latest Note box, along with your user name and the current date (and time).

   b) To view all the notes added for the current process instance, click Show All Notes.

   A sample screen is displayed in the following figure, with first added note at the top of the All Notes list and latest note at the bottom list.

   Note: All Instance-level notes are marked with the label, "Instance Level Note," whereas workstep-level notes are displayed with the corresponding activity name.

   c) Click Hide All Notes to hide all notes.

3. Click Close this Window.

Managing worksteps

You can modify the details of a workstep and the work items of the current workstep. Depending on the status of a workstep, the supported operations are listed in the following Table 12: Managing worksteps on page 70:

Table 12: Managing worksteps

<table>
<thead>
<tr>
<th>Workstep Status</th>
<th>Applicable Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>On Workstep</td>
</tr>
<tr>
<td>Completed</td>
<td>Rollback. You can apply a rollback to Activity, Adapter, Agent, and Subprocess worksteps.</td>
</tr>
<tr>
<td>Activated</td>
<td>Suspend</td>
</tr>
<tr>
<td>Workstep Status</td>
<td>Applicable Operations</td>
</tr>
<tr>
<td>-----------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td></td>
<td>On Workstep</td>
</tr>
<tr>
<td>Suspended</td>
<td>Resume</td>
</tr>
<tr>
<td>Inactive</td>
<td>---</td>
</tr>
</tbody>
</table>

A group member (usually the Manager or Lead) with access to the Management module, can skip the selected Worksteps. You can also bulk skip the worksteps from Update All option, if the worksteps are in suspended state.

### Updating process instance template in Flow view

To update process instance from flow view:

1. Click the **PSV Flow View** icon ( ) in the **My Instances List** page. If you are already in the Tabular View, then click the **Flow View** link.
   - The Flow View displays the process like a flow chart.
2. From the Flow View, you can:
   - Modify the properties of any Inactive workstep by double-clicking it.
   - Remove an Inactive workstep.
   - Zoom in or zoom out of the Flow View. Restore the normal view after zooming in or zooming out.
   - Take a printout of the Flow View.

### Updating worksteps and workitems in Tabular view

In the **Tabular View** page, you can update the status of a workstep and a work item, as discussed in the following sections.

#### Updating an activated workstep

In the **Tabular View** page, an activated workstep’s name and status is shown in orange.

- Depending on the workstep, you can modify the one or more of the following options in workstep details:
  1. For instance, in this case, you can change the **Priority** of the workstep.
  2. From the **Action** drop-down list for the workstep, click **Update**.
  3. You can either suspend or complete the workstep without making any modifications, by clicking the appropriate option from the **Action** list.
  4. Click **Save** to save the changes you made.

#### Updating work item details

To update work item details, perform the following:
1. Click the **Show All** to view the workitems comprising the current workstep.

   The **Show All** button works as a toggle. Clicking it shows the work item(s) table, and changes to **Hide All**.

2. In the work item(s) table, you can perform the following operations on the individual workitems:

   a) In the **Performer** box, enter (or modify) the user name or group name.

      Alternatively, you can click the Edit Performer icon to launch the Search Users window, where you can search for a user to whom you can assign and add it. For more information, see Searching Users on page 34.

   b) From the **Action** drop-down list for that work item, select an option to specify the action to be taken on that work item.

      • Update: Updates the work item with the changes provided.
      • Complete: Completes the work item.
      • Remove: Removes the work item.
      • Blank option: No changes in the work item.

      **Note:** If the Skippable option has been enabled for this work item in Progress Developer Studio for OpenEdge, then the Action drop-down list also displays the Skip option.

3. Click **Save** to save the changes you made in the workitems.

### Suspending a workstep

**To suspend an active workstep:**

1. From the **Action** drop-down list for the workstep, click **Suspend**.
2. Click **Save** to save the changes you made.

   In the Process Status Viewer - **Tabular View** page, the suspended workstep’s name and status is shown in red.

### Resuming a workstep

**To resume a suspended workstep:**

1. From the **Action** drop-down list for the workstep, click **Resume**.

   You can click **Show All** to view the workitems comprising the current workstep.

2. Click **Save** to resume the current workstep.

   The workstep status changes back to Activated.

### Completing a workstep

**To complete an active workstep:**

1. From the **Action** drop-down list for the workstep, click **Complete**.
2. Click **Save** to save the changes you made.
In the Process Status Viewer - **Tabular View** page, the completed workstep’s name and status is shown in green, and the next workstep (if any) is activated.

## Viewing instance history using audit trail

Business Process Portal maintains a complete transactional audit of a process instance, in the form of events in the database. These events capture changes in the process instance status, as well as dataslots.

**Note:** You need administrator privileges to view audit trail of events across Business Process Server applications. For more information, see Chapter 17:"Using the Audit Events Page" in *Business Process Portal Administrator’s Guide*.

You can view the instance history information in the **PSV Flow View** page, or directly (without open the process status) by using the **Audit History** icon provided in the **My Instances** page.

You can configure the maximum number of events that are processed for showing the Audit History for any PI. To configure this, in `bpserver.conf` file, modify the parameter value for `bpserver.audit.max.events`. The default value for this parameter is set to 400. A 0 or negative value results in processing all the events for a PI.

**Note:** You need ACL permissions to see the audit history information. For more details, see *Business Process Portal Administrator’s Guide*.

### To view the audit instance history:

From the **My Instances** page, click the **Audit History** icon ( ) for the process instance, whose information is to be viewed.

The **Audit History** page appears with the Header section and the Details section.

The Header section of the **Audit History** page displays information of the process instance, such as instance name, creator, start date and time, completion date and time, expected duration, total duration, instance status, and elapsed time.

**Note:** The process instance completion date and time, along with total duration, can be displayed only for completed process instances. Only users with managerial privileges can view this audit instance history information. For more information, see Chapter 5, "Viewing Instance History" section in *Business Process Portal Manager’s Guide*.

The Details section of the **Audit History** page displays the instance history information through two views, namely the Basic (default) and the Advanced view.

### From the Basic view

The Basic view is the default mode of displaying the instance history information, as described in *Viewing instance history using audit trail* on page 73.

### Audit history instance details

The columns in the Basic view are explained in *Table 13: Audit history instance details* on page 74:
Table 13: Audit history instance details

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date/Time</td>
<td>Displays the date and time of the activity transactions. You can sort the audit data by clicking on this column header.</td>
</tr>
<tr>
<td>Activity (Group By)</td>
<td>Displays the name of the activities in the process.</td>
</tr>
<tr>
<td>Performer</td>
<td>Displays the name of the performer to whom each activity is assigned.</td>
</tr>
<tr>
<td>Description</td>
<td>Describes the status change of the process instance or the activity transaction. For instance, &quot;Review Contract' task created and assigned&quot; or &quot;Mail Contract' task reassigned by Nancy&quot; or simply, &quot;Instance completed.&quot;</td>
</tr>
<tr>
<td>Data Changes</td>
<td>Available only for completed tasks. Select the Show Data Changes icon ( ) to drill down to the dataslot value changes.</td>
</tr>
</tbody>
</table>

You can view the change in the value of all the output dataslots between activation and completion of the activity transaction in the form of a table.

To hide the data changes table, click the Hide Data Changes icon ( ).

**Note:** Object dataslots are not included in the audit events; therefore, their values do not appear in the above table.

**From the Advanced view**

The Advanced view displays the instance history information (as displayed in the Basic view) along with the dataslot value changes for all the completed worksteps. The Advanced view provides a convenient mode for printing the entire Audit History page.

**To switch to Advanced view:**

1. From the Basic view of the Audit History page (described in From the Basic view on page 73), select the Data Changes checkbox in the Header section.
2. Click Refresh View.
   
   The Audit History page displays the dataslot value changes after each completed activity.

**View Notes/Comments log**

The Notes/Comments Log provides a list of notes or comments made by performers of all the activities during the process instance execution. You can also view notes or comments (if any) entered by your manager. In the case of processes with collaborative tasks, notes entered by collaborators are also displayed.

**To view the Notes/Comments Log:**

1. From the Header section of the Audit History page, select the Note/Comments log check box.
2. Click Refresh View.
   
   The Audit History page displays all the notes or comments.
The log displays the date and time of the activity transaction, the activity name, the performer name, followed by the notes or comments. The activity name is only displayed for notes and comments entered at workstep-level.

Note: You cannot combine the Notes/Comments Log view with the other view options.

Exporting instance history information

You can save the instance history information displayed in the basic and advanced views, as an MS Excel (.xls) file.

To save as excel:

Click Export To Excel in the Header section (refer to From the Advanced view on page 74).

The browser prompts you to either view the Excel file (named as AuditHistory.xls) or save the file for future viewing.

Removing your instances

You can remove instances that were created by you, giving you a better control over your instances.

To remove instances:

1. From the My Instances page select the instances you want to remove.
2. Click Remove.

The selected instances are removed.
Managing Alerts

In Business Process Portal, an Alert is a form of notification to an application user of a predefined event, such as change in the status of a process instance or an exceptional condition being satisfied in the process instance. The user is notified of the alert, through e-mail.

To perform any action on these alerts, you must switch from your email client to Business Process Portal.

Application Developers define alerts using Progress Developer Studio for OpenEdge. The recipient of the defined alert is selected in the Alerts content pane tab of Progress Developer Studio for OpenEdge. For information on defining alerts, see Chapter 17: "Using Alerts" in OpenEdge Getting Started: Developing BPM Applications with Developer Studio.

Alerts defined in Progress Developer Studio for OpenEdge are published to Business Process Portal from the process engine and rule engine components of Business Process Server.

An external application can also send an alert to Business Process Server. For more information about sending alerts from an external system, see Alerts from external application on page 80.

For details, see the following topics:

- Viewing alerts
- Notifying users
- E-mailing the alert message
- Viewing Process Status in Flow View
- Managing alert subscription
- Removing alerts
- Alerts from external application
Viewing alerts

Click the My Alerts menu to open the My Alerts page displaying the list of alerts received by you. Typically, each alert consists of the following attributes as listed in Table 14: My Alerts list information on page 78:

Table 14: My Alerts list information

<table>
<thead>
<tr>
<th>Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application</td>
<td>The name of the application, associated with the alert.</td>
</tr>
<tr>
<td>Name</td>
<td>The name of the alert, as defined in Progress Developer Studio for OpenEdge.</td>
</tr>
<tr>
<td>Message</td>
<td>The message of the alert, providing you with the alert event information.</td>
</tr>
<tr>
<td>Severity</td>
<td>Indicates how quickly you must respond to the alert. Possible values are Critical, High, Medium, and Low.</td>
</tr>
<tr>
<td>Date</td>
<td>The date and time, when the alert was triggered.</td>
</tr>
<tr>
<td>Action</td>
<td>• Click the Forward Alert icon ( ) in this column to notify other users (or groups) of the alert.</td>
</tr>
<tr>
<td></td>
<td>• Click the Send Email icon ( ) to send an e-mail message to an external user, regarding the alert.</td>
</tr>
<tr>
<td></td>
<td>• Click the Process Status Viewer icon ( ) to view and edit the flow view of the Process Status Viewer for the process.</td>
</tr>
<tr>
<td></td>
<td>• Click the Infopad manager icon ( ) to view the Infopad manager page.</td>
</tr>
</tbody>
</table>

To manage the contents of the list, you can filter and sort them. You can use filters to list the alerts according to an application, severity, a range of dates, or any combination of these. You can also sort the alert list according to the alert name, severity, application, or date. To navigate through the pages, you can use the paging controls. For more details about these operations, see Exploring Business Process Portal on page 25.

Note: To hide the PSV icon in the My Alerts page, set the value of bpmportal.alerts.psv.show parameter to FALSE in the bpmportal.conf file in OEBPS_Home/conf directory.

From the My Alerts page, you can perform the following operations:

• Notify other users (or groups) of the alert, as described in Notifying users on page 79.

• Send an e-mail message (regarding the alert) to an external user, as described in E-mailing the alert message on page 79.

• View (and edit) the process instance status in the PSV Flow View, as described in Viewing Process Status in Flow View on page 79.

• Remove alerts, as described in Removing alerts on page 80.
**Notifying users**

You can notify other users (or groups) of the alert you have received, by forwarding the alert.

**To forward the alert:**

1. From the **My Alerts** page, click the **Forward Alert** icon (IGHL). The **Forward Alert to User(s) and Group(s)** window appears.
2. Search the users or groups, as described in Searching Users on page 34. Alternatively, you can click All in the Quick Search bar to display all the users and groups.
3. Select the checkbox for the user and group, to whom you want to forward the alert.
4. Click **Forward** to forward the alert.
   
   To cancel the action and close the window, click **Cancel**.

**E-mailing the alert message**

You can e-mail the details of the alert received by clicking the **Send Email** icon (IGHL) in the **My Alerts** page. Business Process Portal launches your default mail client with the following parameters:

- The E-mail recipient box, by default, contains your e-mail address. Replace this with the e-mail address where you want to send the message.
- The Subject line contains the alert name.
- The Message body contains alert message.

You can accept (or edit) the default parameters before sending the e-mail.

**Viewing Process Status in Flow View**

You can view the process status of the current application associated with the alert. Click the **Process Status Viewer** icon (IGHL) in the **My Alerts** page. This display the process status in the form of a flowchart. For more information about Process Status Viewer, see Viewing process status on page 65.

**Note:** You need the requisite permission to view and edit the Process Status Viewer. For more details, see Business Process Portal Administrator’s Guide.

**Managing alert subscription**

By default, Business Process Portal sends alerts to you for all installed applications, provided you are in the recipient list of the alert. Alert Subscription allows you to subscribe (or unsubscribe) to alerts at application level. After unsubscribing, you will receive alerts for only those applications, which you have subscribed.
Note: You can subscribe to/unsubscribe from alerts of external application also.

To update alert subscription:

1. Click **Preferences > Alerts** to display the **Alert Subscription** page.
   
   This page indicates the applications, whose alerts you have subscribed, with selected checkboxes.

2. To unsubscribe, clear the checkbox for the application from which you do not want to receive alerts.
   
   Alternatively, to subscribe, select the check box for the application.

3. Click **Save Subscription** to save your subscription settings.
   
   Click **Reset** to discard your changes.

Removing alerts

You can remove alerts from the **My Alerts** page, once you have reviewed them.

To remove alerts:

1. In the **My Alerts** page, select the alerts you want to remove.

2. Click **Remove**.

The selected alerts are removed.

Alerts from external application

In addition to Business Process Server, an external application can also send a JMS message with alert information to a Business Process Server queue. Messages sent to this queue are processed by Business Process Server. If the selector property in the message matches with the required value, then it is identified as an alert message. Business Process Server collects the required data values and publishes the alert. Once Business Process Server publishes the alert for the intended recipients, they can see it in their **My Alerts** page.

As external alerts are not associated with any Business Process Server application, they do not have any process context associated with the alert messages. Therefore, Business Process Server cannot support external alert messages with dataslots. However, Business Process Server supports alert messages with dataslots for alert messages defined in a Business Process Server application.

**JMS message**

The alert message must be sent in the specified structure to the Business Process Server queue. This message must contain the message selector property and message body. The message must be of type ObjectMessage, and a Map object must be set on that ObjectMessage.

**Message property**

The following Table 15: JMS message properties details on page 81 explains the message property details for the JMS message with alert information.
Table 15: JMS message properties details

<table>
<thead>
<tr>
<th>Property name</th>
<th>Property value</th>
<th>Data type</th>
</tr>
</thead>
<tbody>
<tr>
<td>messageName</td>
<td>PUBLISH_ALERT</td>
<td>java.lang.String</td>
</tr>
</tbody>
</table>

This property is mandatory, and must have the specified value.

Message body

The following Table 16: JMS message body details on page 81 explains the message body details for the JMS message with alert information.

Table 16: JMS message body details

<table>
<thead>
<tr>
<th>Property name</th>
<th>Property value</th>
<th>Data type</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALERT_NAME</td>
<td>Alert name</td>
<td>java.lang.String</td>
<td>The name of the alert.</td>
</tr>
<tr>
<td>APPLICATION_NAME</td>
<td>Name of the application sending alert</td>
<td>java.lang.String</td>
<td>You can use this property to group alerts with common origin/sender.</td>
</tr>
<tr>
<td>ALERT_MESSAGE</td>
<td>Alert message</td>
<td>java.lang.String</td>
<td>The alert message.</td>
</tr>
<tr>
<td>ALERT_SEVERITY</td>
<td>Severity value of the alert</td>
<td>java.lang.String</td>
<td>The severity of the alert. Valid values are CRITICAL, HIGH, MEDIUM, and LOW.</td>
</tr>
<tr>
<td>ALERT_RECIPIENT</td>
<td>List of recipients of the alert</td>
<td>java.util.List&lt;String&gt;</td>
<td>The list of valid Business Process Server users. These users can see the alert in their My Alerts page.</td>
</tr>
</tbody>
</table>

All the above properties are mandatory.

Connecting to a Business Process Server to send alert message

You must connect to a JMS provider to send an alert to Business Process Server. All the JMS messages should be delivered to the destination "jms/SMMessageQueue" using the connection factory "BMConnectionFactoryXA". The details for connecting to a JMS provider are available in the OEBPS_HOME\conf\oebpsjndi.properties file. The following Table 17: JMS provider details on page 81 lists the parameters you must check from the oebpsjndi.properties file.

Table 17: JMS provider details

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>oebps.&lt;appserver&gt;.jms.factory.initial</td>
<td>Initial context factory class name.</td>
</tr>
<tr>
<td>oebps.&lt;appserver&gt;.jms.provider.url</td>
<td>Provider URL.</td>
</tr>
</tbody>
</table>
## Parameter Description

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>oebps.&lt;appserver&gt;.jms.principal</td>
<td>User name.</td>
</tr>
<tr>
<td>oebps.&lt;appserver&gt;.jms.credentials</td>
<td>Password.</td>
</tr>
</tbody>
</table>
Using Dashboards

The Dashboard enables you to graphically view the status of several business processes on a single Web page and to monitor the progress of these processes.

Each time a process instance is created, Business Process Portal enters the data in a default Dashboard Table, or updates the data in an existing Dashboard table after a delay, which is configurable. You can view this information in the Dashboard page. However, you must log out and log in to Business Process Portal again to see changes in a database reflected in the Dashboard.

Default dashboard widgets shows only a maximum of 50 records. This is because loading all the records for tasks, instances and alerts portlet affects the dashboard response time.

Business Process Portal supports the following types of widgets.

- **Graphical** — The widget information is provided in the form of a chart. For example, pie, bar, funnel and so on.
- **Tabular** — The widget information is provided in tabular format.
- **Infopad** — Displays infopad information of the selected application.
- **Scorecard** — Displays scorecard information.
- **Global Dataslot** — Displays the global dataslots values for the application.

**Note:** You can modify the Global dataslot values from portal for that application.

- **Other** — Displays the custom widget information.
• **Composite UI** — Defines widget for external applications.

For details, see the following topics:

• Managing your dashboard

• Viewing the details of a component

## Managing your dashboard

Typically, your Business Process Server administrator assigns the dashboard to you or to your group. However, you may customize this assigned dashboard by editing it as per your requirements. When you edit an assigned dashboard, this custom dashboard becomes your default dashboard. If needed, you can restore your originally assigned dashboard as your default dashboard. For more information about defining dashboards and dashboard precedence, see Chapter 14: "Working with Dashboards" in *Business Process Portal Administrator’s Guide*.

## Accessing the dashboard

To access the Dashboard:

• Click the **Dashboard** menu. The **Dashboard** page appears.

• You can use the edit icon ( ![edit icon](image.png) ) next to the Dashboard name to modify the dashboard.

• The widget tools will only appear on the widget header when the mouse pointer is above the respective widget.

• The Graphical widgets expand or shrink to contain in the available space without scroll bars.

• In widgets having search criteria, a line separation has been provided to align search button from rest of the fields.

• In graphical widgets, a new configure tool has been added to the widget header. When user click on this tool, the menu to change the type and width of chart is displayed.

• In graphical widgets, functionality is provided to change to different charts based on the configuration of the widget. A sub-menu containing a list of supported charts for a graphical widget is displayed when user click on configure tool -> Types. User can select the desired chart from the menu and the graphical widget displays the selected chart. The chart re-configuration is done at HTML-JS layer at the client side and no server call made. The information of changed chart is not stored in memory. So when user refresh or moves out of the page, the graphical widget switches back to the original configured chart. The functionality like drill down may not be available in the changed charts in some cases. User has to switch back to the original chart to get that functionality.

• In graphical widgets, functionality is provided to change the width of the charts. The user can enter the width in the text box given in the width menu (configure tool -> width). Press enter key make the change to effect. A menu option is given to restore the width to default. The width will be restored to default when user refresh or move out the page. The minimum value of the width is calculated based on the column width of the dashboard layout. The user cannot enter a value less than the minimum width. The maximum width is configurable in portal configuration file using property ‘bpmportal.widget.chart.maxWidth’ which defaults to 4000.

• Two new layouts have been provided for dashboard - Three columns 25-25-50 and Three Columns 30-30-40. The default layout for performance dashboard has been set to Three Column 25-25-50 layout. The graphical
widgets are shown at the left side in two columns and tabular widgets are shown at right side in single column

Dashboard page

The Dashboard page displays the dashboard assigned (or available) to you. Business Process Portal provides the following out-of-the-box dashboard components:

- **My Task List**, which displays a list of tasks for the current user in a tabular format.
- **My Instance List**, which displays a list of instances created by the current user in a tabular format.
- **Application Priorities**, which displays priorities of all installed applications in a doughnut chart format.
- **My Overdue Summary**, which displays a summary of overdue tasks for the current user in a gauge format.
- **My Tasks Details**, which displays task details for the current user in a bar chart format.
- **My Tasks Due Today**, which displays the tasks that are due today for the current user in a bar chart format.
- **My Overdue Tasks**, which displays the overdue tasks for the current user in a funnel chart format.
- **My Active Tasks**, which displays active tasks for the current user in a pyramid chart format.
- **My Alert List**, which displays a list of alerts received by the current user in a tabular format.
- **Map**, which displays the map of the specified location.
- **News**, which displays the latest news from the specified source.
- **Weather**, which displays the current weather information for the specified location.
- **Heatmap Widget**, which displays heatmap of an application.

By default, all the above components, except the Heatmap Widget and Map, are available with the default dashboard — **Performance Dashboard**.

---

Note: You can use the Map component only if you have a valid license for the Google Maps.

From the Dashboard page, you can also perform the following operations:

- Select your default dashboard, as described in Selecting your dashboard on page 86.
- Customize your dashboard, as described in Customizing your dashboard on page 86.
- Restore a customized dashboard, as described in Restoring default dashboard on page 88.
- View component details and generate reports, as described in Viewing the details of a component on page 88.

---

Refreshing dashboard components

You can refresh the data in each of these dashboard components, by using the Refresh functionality.

**To refresh the dashboard components:**

Click the Refresh icon (⟳) from the title of the component.
Business Process Portal reloads the dashboard component with the refreshed data.

Selecting your dashboard

If your administrator has not set any default dashboard for you, then you can select your default dashboard.

To select a dashboard:

From the Dashboard page, click the Dashboard drop-down list and select the dashboard that you want to set as your default dashboard.

The Dashboard page reloads with the dashboard components, belonging to the selected dashboard.

The Dashboard list displays multiple dashboards, only if there are multiple dashboards available to you.

Note: After customizing your default dashboard, if you change the default dashboard selection, Business Process Portal does not retain your customized dashboard.

Customizing your dashboard

You can customize your selected dashboard by changing its layout and adding dashboard components.

To customize your dashboard:

1. From the Dashboard page, click the Edit Dashboard link.

   The Dashboard Details page appears with the details of your selected dashboard.

2. In the General tab, you can enter or modify the dashboard description in the Description box.

3. From the Layout list, you can change the layout options, used to arrange the dashboard components.

   The available options are OneColumn, TwoColumns50-50, TwoColumns70-30, TwoColumns30-70, ThreeColumns, FourColumns20-20-20-40, ThreeColumns20-40-40, and TwoColumns20-80.

   Tip: For example, if you select TwoColumns70-30 option, then the first column of components occupies 70% of the dashboard width and the second column occupies 30%.

4. Click the Components tab.

   This page displays the dashboard components, as defined by your administrator, when defining the dashboard.

5. To add a dashboard component, click Add Component.

   The Add Dashboard Component window appears.

   a) From the Application Name list, select the application to select dashboard components of that application, or All to select dashboard components which are not specific to any application.

   Based on your selection of application in the previous step, the Category drop-down list provides you appropriate options.

   b) From the Category drop-down list, select the category to which you want to add the dashboard component or All to add the component to all categories.
Based on your selection of application and category in the previous steps, the Component drop-down list provides you appropriate options.

c) From the **Component** list, select the dashboard component.

d) If the title and description of the component are already specified while creating the component in Progress Developer Studio for OpenEdge, then they are displayed in the relevant boxes. You may edit them. If the title and description are not specified while creating the component, then you can specify them in the relevant boxes.

e) If you select a component of type **Other** or **Composite UI**, and if the target URL to be used by this component is not specified in Progress Developer Studio for OpenEdge, then you can specify the target URL. If the target URL is specified in Progress Developer Studio for OpenEdge, then you can edit it if required.

You can specify the target URL in any one of the following ways.

- **Absolute URL**: This is the complete URL including the protocol, host name and port number.
- **Server Alias**: You can specify the URL using the server alias '${<server-alias-name>}' notation. For example, in the case of Apama, you can specify "${Apama1}/tutorial/main".
- **Relative URL**: You can specify the URL relative to the server alias. In this case, the server alias is to be specified at runtime, that is, while adding the component to the dashboard. For example, "/tutorial/main".

f) You can add the parameter names and their values in the Parameters table if it is displayed.

If the target URL is a relative URL, then you must specify the server configuration by selecting a server from the Server Configuration drop-down list.

<table>
<thead>
<tr>
<th>To. . .</th>
<th>Do this. . .</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Parameter</td>
<td>Click <strong>Add Parameter</strong> icon, a new row is added.</td>
</tr>
<tr>
<td>Param Name</td>
<td>Click the cell below the Param Name column to specify the parameter name.</td>
</tr>
<tr>
<td>Param Value</td>
<td>Click the cell below the Param Value to specify the parameter value.</td>
</tr>
<tr>
<td>Rearrange rows</td>
<td>Using the drag-and-drop operation, you can rearrange rows.</td>
</tr>
<tr>
<td>Delete Parameter and its value</td>
<td>Click <strong>Delete Parameter</strong> icon to delete a parameter and its value.</td>
</tr>
</tbody>
</table>

Click **Save** to add the dashboard component.

Click **Reset** to discard your changes or click **Cancel** to cancel the current operation and close the window.

Business Process Portal adds the dashboard component to the Component tab page. Repeat Step 5 to add more dashboard components.

The components are arranged according to the layout you have specified in the General tab. You can also change the position of the component on the **Component** page, as well as refresh, minimize, or remove the component, as described below.
• To change the position of the component, point to the component title and then drag the component to the desired position.
• To refresh the component data, click 🔄. The dashboard component data is refreshed.
• To minimize the component window, click 📔. After minimizing, to restore the window, click 📔.
• To remove the component from the dashboard, click ✖.

6. Click Save to save the changes you have made in the dashboard.
   Click Reset to discard your changes. Click Cancel to cancel the action and return to the Dashboard page.

Restoring default dashboard
You can restore your customized dashboard to its original settings, as created by your administrator.

To restore default Dashboard:
From the Dashboard page, click Restore to Default.
The dashboard is restored to its original settings.

Viewing the details of a component
To view the details of a component:
Click any of the following dashboard components to drill down to the next level of data and view its details.
Depending upon the component clicked, a different report is invoked.
The following table presents the type of reports or page invoked by each component.

Table 18: Predefined Reports Invoked from Dashboard

<table>
<thead>
<tr>
<th>Component</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Task List</td>
<td>Task Details</td>
</tr>
<tr>
<td>My Instance List</td>
<td>PSV Tabular View, PSV Flow View, Audit History</td>
</tr>
<tr>
<td>My Tasks Details</td>
<td>Application: <code>&lt;Application_Name&gt;</code> Status: <code>&lt;Task_Status&gt;</code></td>
</tr>
<tr>
<td>My Alert List</td>
<td>Does not display any predefined report. Allows to send an e-mail to an external user, regarding the alert.</td>
</tr>
</tbody>
</table>

For more information about predefined reports, see Appendix A: “Predefined Reports” in Business Process Portal Manager’s Guide.
Managing Profile and Favorites

The Profile page allows you edit your user profile, as well as modify other settings including your start page, password, default filter, and default application.

For details, see the following topics:

- Viewing user profile
- Using favorites

Viewing user profile

To view the Profile page,

- Click Profile menu.

This page lists details of your user profile as described in the following sections.

User profile

The Profile page displays your user name, organization, tenancy, and skills in read-only mode and other details in editable mode. In this page, you can update the following details:

- First Name
- Last Name
• Current Password — Type your current password in the box provided. To change your password, see Changing user password on page 91.

• Email

• Phone

• Language — Business Process Portal supports English (United States), French, and Japanese language.

• URL

• City

• State

• ZIP Code

• Time Zone

• Organization — This is the name of your organization as specified by the Administrator.

• Tenancy — This is the duration and/or nature of your hiring contract with the organization. For example, Permanent, On Contract.

• Skills — This is skill you posses as specified by the Administrator.

• Default Filter — The filter selected is applied to the Task List page by default. You can select from the list of Global Filters or from My Filter, the list of filters you created from the Preferences > Filters menu. Application-specific filters are listed as options in this drop-down list, only when you select the corresponding application in the Application list.

• Start Page — You can select a page to be displayed when you login, from the drop-down list.

Note: If you set BPM Webflow application as the start page, then ensure that, in the BPM Webflow application workstep, a link is provided to navigate back to portal. Otherwise, you cannot navigate to portal again.

• Hide Default Columns — Select the default column(s) that you want to hide from the view to reduce clutter. The columns you have selected for hiding are hidden from the respective pages. For example, if you select Chart/Audit History column, then it is hidden from My Instances page. If you select Application column, then it is hidden from My Tasks page, My Collaboration page and My Instances page.

• Application — Select an application as your default application from the drop-down list. In all pages containing Application drop-down list, this application is displayed as your default application.

• Messenger Type and ID — Select the instant messaging software from the drop-down list provided, and then type your corresponding ID.

Updating profile

To view and edit your personal details:

1. In the Profile page, enter or change the data as necessary. The fields marked with a red asterix are required fields.

2. Click Save to save the changes.

Business Process Portal displays the Profile page reflecting the updated data.
Changing user password

Business Process Portal allows you to change your login password from the Profile page. Once you change your password successfully, you must use the updated password, the next time you log into Business Process Portal.

To change your password:

1. From the Profile page, click the Change Password link.
   
The Change Password window appears.
2. Type your current login password in the Current Password box.
3. Type your updated login password in the Type New Password and Confirm New Password boxes.

   **Note:** Be aware that the password is case sensitive in all realms. For more information, refer to the "Case Sensitivity for User Management" section of the Business Process Portal Administrator’s Guide.

4. Click Submit to save your updated password.
   
   An appropriate message is displayed, indicating whether the password was updated or not.
   
   Click Reset to discard your changes. Click Cancel to cancel your operation and close the current window.

Updating Business Process Server details for LDAP user

Note that for an external User Management Systems such as LDAP, the user details can be updated only in the external system, and not in Business Process Server. However, details specific to Business Process Server can be updated from the Profile page.

The Profile page for LDAP user management system is similar to the Profile page. Here, you can update all details except for user information such as first (and last) name, email address, password, and phone.

Using favorites

The Favorites menu allows you to access the frequently used links specified for your group by your Business Process Server Administrator.

The Display Name specified in the Add Favorites page in the Administration module while creating a favorite link, is shown as a Favorites menu option.

- Click this menu option to access the link.
   
   Business Process Portal launches that link in a separate browser window.
   
   These links may include popular Web applications, Business Process Server applications, internet and/or intra-net sites.
Setting Preferences

The Preferences menu options allows you to create your own filters, specify delegation settings, and select your calendar. Your filters are listed in the Filter drop-down list on other pages. You can optionally delegate all or some of your applications to one or more users.

The Preferences menu contains the following options:

- Filters (described in Filters on page 94)
- Delegate Settings (described in Delegate tasks on page 98)
- Calendars (described in Managing your calendar on page 99)
- Alerts (described in Managing alert subscription on page 79)

For details, see the following topics:

- Filters
- Delegate tasks
- Managing your calendar
- Editing your calendar
Filters

Business Process Portal provides predefined Global Filters for the most common filtering conditions. Your Business Process Server Administrator can add **Admin Filters**, that can be used across your organization. In your filter list, both the Global Filters and the Admin Filters appear as Global Filters.

In addition to these, you can also create filters to suite your own requirements. Such filters are listed as **My Filters**.

All these filters are listed in the Filter drop-down list on other pages. The Global Filters are accessible to all users, while My Filters are accessible only to the user who creates them. Therefore, the list of My Filters may vary from user to user.

As an application user, you can use all the types of filters. You can also copy them to be used as your own filters. However, you cannot edit or delete the Global Filters.

Viewing filters

To view Filter List page:

Click **Preferences > Filters**.

The **Filter List** page appears with a list of filters created by you. This page helps you to filter the records based on the selected Application and its Version.

Managing filters

The **Filter List** page displays information about the available filters including the filters defined by you. It displays all filters created by you and the following information about each filter as described in **Table 19: My Application list information** on page 94:

<table>
<thead>
<tr>
<th>Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application</td>
<td>Displays &quot;All&quot; for filters created for all applications. For application-specific filters, the name of the application is displayed.</td>
</tr>
<tr>
<td>Version</td>
<td>Displays the version name. This helps you to sort the records based on version name.</td>
</tr>
<tr>
<td>Filter</td>
<td>The name of the filter.</td>
</tr>
<tr>
<td>Description</td>
<td>Additional information about a filter.</td>
</tr>
<tr>
<td>Filter Type</td>
<td>Type of filter: Global Filter / My Filter. Only <strong>My Filter</strong> type filters are editable.</td>
</tr>
</tbody>
</table>

To manage the contents of the list, you can filter and sort them. You can use filters for any one of the following combinations:

- All applications (By default only all versions option is available)
• All versions of a particular application
• Particular version of a particular application

To navigate through the pages, you can use the paging controls. For more details about these operations, see Exploring Business Process Portal on page 25.

From the Filter List page, you can perform the following operations:
• Add a new filter, as described in Adding My Filters on page 95.
• Copy an existing filter, as described in Copying My Filters on page 97.
• Modify an existing filter, as described in Modifying My Filters on page 97.
• Delete a filter as described in Deleting My Filters on page 97.

Adding My Filters

To remove clutter and to focus on your work, you can limit the tasks displayed in your Task list by defining your own filters.

To define filters follow the steps in the Filter List page:

1. Select the application from the Application drop-down list or select All.
   The Application drop-down list in the Filter List page lists the currently installed applications.

2. Select the Version. You can also define an application’s version-specific filter.
   • If you select All from the Application drop-down list in step 1, then the Version(s) drop-down list displays All option only. In this case, only system dataslots are available to you on the Filtering and Sorting tabs of the Add Filter page.
   • If you select a specific application from the Application drop-down list in step 1 and All from the Version(s) drop-down list, then only system dataslots are available.
   • If you select a specific application from the Application drop-down list in step 1 and a specific version from the Version(s) drop-down list, then the selected application’s selected version’s dataslot(s) are available.

   Note: Application-specific filters are displayed in the Filter bar and the Profile page only when you select the corresponding application. Similarly, version-specific application filters are displayed only when you select the corresponding version.

3. In the Filters page, click Add Filter.
   The Add Filter page appears.

4. Specify the name and description for the filter.

5. Click the Filtering tab to display filtering conditions.
   You can specify the filtering expression on the Filter page.
   a) Select the opening brackets you need.
   b) Select the Dataslot that you want to use.
      The Dataslot drop-down list displays the system dataslots, predefined for all BPM Projects.
Note: For application-specific filters only the predefined system dataslots are displayed. For version-specific filters, in addition to the predefined system dataslots, the Dataslot drop-down list displays all the custom dataslots defined for that version.

Dataslots of the type Map, EXTENT, Object, and Business Object are not included in this list.

c) Select the operator from the Test drop-down list.

d) Specify the value of the dataslot on which the operator is to be used.
   The options in the Value column depend on the dataslot you select.

e) Select the closing brackets you need.
   If you are building a nested expression, then you can select the blank option from the drop-down list, and continue building your expression.

f) Select the logical operator if you want to continue building your expression.
   If you have reached the end of expression, then select the blank option from the Logic drop-down list.

g) To add more rows and continue building your expression, click Add 5 Rows.

Tip: To remove unwanted rows, select their respective checkboxes in the first column, and then click Delete Rows.

h) After you have completed building the expression, click Preview Filtering Expression, to view the complete expression.
   Your expression is displayed in a window.

i) Click Close.
   The window is closed.

6. Click the Sorting tab.
   You can specify the sorting order on this tabbed page.

7. Select the dataslots and their respective direction of sorting.
   As in the Filtering tab, the Dataslot drop-down list displays only the system dataslots.

   Note: For version-specific filters, as in the Filtering tab, the Dataslot drop-down list displays all the dataslots, including the predefined system dataslots and the custom dataslots.

8. Click Save to save the current filter definition and go back to the previous page.
   Click Save & Add New to save the current filter definition and reload the current page to continue adding another filter.
   Click Reset to discard your changes.
   Click Cancel to cancel the operation and return to the previous page.

   The added filter is displayed on the Filter List page, with Filter Type as "My Filter."
The filters you create here are added under the "My Filter" group of the Default Filter drop-down list in the Profile page, from where you can select your default filter.

They are also available under "My Filter" group of the Filter drop-down list in the Task List page, where you can select the current filter.

**Copying My Filters**

For your convenience, you can copy an existing filter and if needed, modify it to define a new filter.

**To copy an existing filter:**

1. In the Filter List page, click Copy Filter.
   
   The Copy Filter window appears.

2. From the Filter drop-down list, select the name of the existing filter that you want to copy.

3. Specify a name for the copied filter in the Save a Copy box.

4. Click Save to save the copy of the selected filter as the specified name.

The copied filter is displayed on the Filter List page, with Filter Type as "My Filter."

Typically after a filter is copied, you may want to modify the newly created copy. In the Filter List page, click the copied filter name link, to open the Filter Details page.

**Modifying My Filters**

The filters that you create are listed as type My Filter, and have links to open them. You can modify only these filters. Global Filter are not editable.

**To modify a filter, follow these steps:**

1. In the Filter List page, click the filter name link in the Filter column, that you want to modify.

   The Filter Details page appears.

2. You can modify the details of the current filter on the Name, Filtering, and Sorting tabs.
   
   For more details, see steps 2–7 in the Adding My Filters on page 95.

3. Click Save.

   Saves the current filter definition and goes back to the previous page.

**Deleting My Filters**

You can only delete filters of type My Filter.

**To do so, follow these steps:**

1. In the Filter List page, select the filter that you want to delete.

   For more details about this operation, see Selecting and clearing rows on page 30.

2. Click Delete.

   Business Process Portal deletes the selected filter and it is removed from the list.
Alternatively, you can delete the current filter from the Filter Details page.

**Note:** You can simultaneously delete multiple filters. To do this, in the Filter List page, select multiple filters and then click **Delete**. Business Process Portal deletes all the selected filters.

### Delegate tasks

Delegation is normally used when you plan your absence for an anticipated period of time. In the case of unplanned absence, your Business Process Server Administrator can delegate your tasks.

If your task list contains tasks assigned to you and tasks delegated to you, and if you want to delegate your tasks to another performer, then only the tasks **assigned** to you, can be delegated. Tasks **delegated** to you cannot be re-delegated to the other performer. However, your Business Process Server Administrator can delegate those tasks to another performer. Refer to the "Delegating Tasks to Users" section of the Business Process Portal Administrator’s Guide for more information.

While working on your assignment, if you realize that you are unable to perform your tasks, then you can delegate all or some of your applications to one or more users. You can define your delegation preferences in the Delegate Settings page, so that you need not manually reassign your individual tasks.

The Delegate Settings page offers two delegation options to you. The first option is to delegate all assigned tasks (irrespective of the application) to a single user. Alternatively, you can delegate specific applications individually to multiple users. For example, tasks of "Approval" application can be delegated to User1. However, in this option, tasks belonging to applications, which are not delegated, remain assigned to you.

### Delegating tasks

**To configure the Delegate Settings, perform the following:**

1. Click **Preferences** > **Delegate Settings**.
   
   The Delegate Settings page appears.

2. If you want to delegate all your tasks to a single user, then specify the user name in the **Delegate all tasks to** box.
   
   Alternatively, for each application, you can specify the user name to whom that application should be delegated in the **Delegated To** box. If needed, you can search and add users for delegating all tasks or delegating application-wise tasks. For more details, see Searching Users on page 34.

3. In the **Application** list, click the application to be delegated.

4. Select the checkbox in the Disable Delegation column, if you want to disable delegation of tasks in a particular application.
   
   Select the check box in the Disable Delegation column header to disable delegation of all the tasks in all the application, that would be assigned to you.

   **Note:** You can delegate only at application level, and not at a specific task level. All the tasks in an application are delegated to the specified user.

5. Specify the start and end dates of delegation period in the **Start Date** and **End Date** boxes.
Alternatively, click the **Date Selector** icon to set the respective start date or end date. For more details, see **Specifying a Date** on page 33.

The delegation settings are valid only for the specified period. If you want to delegate for a different period, then you must repeat this procedure. For example, consider that you have defined one set of delegation for January 15, 2007 – January 29, 2007. Now if you want to define delegation settings for January 29, 2007 – February 5, 2007, then you must repeat the procedure.

6. To add rows for delegating more applications, click **Add 5 Rows**.
   To remove unwanted rows, select their respective check boxes in the first column, and then click **Delete Rows**.

7. Click **Save**.
   Your settings are saved.

---

**Managing your calendar**

Typically, your calendar is set by your administrator, and used for all your due date calculations. For more information on defining a calendar, refer to *Business Process Portal Administrator’s Guide*. You can also edit it to accommodate the individual variations in working and non-working time.

In case no calendar is assigned by your administrator, you can select your own calendar from the list of calendars available in the system.

**Selecting your calendar**

If the administrator has not set any calendar for you, then you can select your own calendar.

To select your calendar:

1. Click **Preferences > Calendar**.
   The list of available calendars appears.

2. Choose a calendar and click **Select Calendar**.
   The selected calendar is set for you. The next time you open this page, this calendar is displayed.

**Viewing your calendar**

You can view your selected calendar in the **Calendar View** page.

To view your calendar:

1. Click **Preferences > Calendar**.
   The **Calendar** page appears.
   This page displays the calendar details for the current month and year. The calendar displays the weekend dates in grey and the holidays (if any) for the selected month in purple.

2. Select the **Month** and **Year** from the respective drop-down lists.
   The calendar for the selected month and year is displayed with weekends and holidays (if any).
The **Holidays for the Selected Year** table lists all the holidays in the chronological order. You can click the date of a holiday to display the calendar of the month in which that holiday falls.

3. Click the **Calendar Details** link to go to the **Calendar Details** page. From this page, you can edit the calendar properties as described in *From the Calendar Details page* on page 101.

4. Click the **Calendar List** link to go to the **Calendar List** page. You can now select another calendar from a list of calendars available in the system.

**Note:** When you go to the **Calendar List** page, the default settings of your calendar are restored.

### Editing your calendar

You can edit your selected calendar from the **Calendar View** page or from the **Calendar Details** page. Depending on the operation to be performed (as described in the following table), you can open either the **Calendar View** page or **Calendar Details** page. Refer *Table 20: Editing Operations in Calendar* on page 100.

<table>
<thead>
<tr>
<th>From Calendar View page</th>
<th>From Calendar Details page</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Mark a working day as holiday.</td>
<td>• Modify the calendar description, time zone, year range, business hours, and mid-day break time.</td>
</tr>
<tr>
<td>• Mark a holiday as a working day.</td>
<td>• Add or delete working time differing from the regular business hours.</td>
</tr>
<tr>
<td></td>
<td>• Add or delete non-working time such as holidays and weekends.</td>
</tr>
</tbody>
</table>

**Note:** The first time you edit your business calendar, a copy of the calendar is created and subsequently used for computing due dates for tasks assigned to you. However, this copy is not added to the calendar list.

Any changes made in this copy are not reflected to other users using the same calendar.

### From the Calendar View page

In the **Calendar View** page, you can mark a working day to mark it as a holiday as described in *Marking holidays* on page 100. You can also click a holiday to make it a working day as described in *Unmarking holidays* on page 101.

**Note:** Click **Restore Default Calendar** to restore the calendar to its original settings.

### Marking holidays

**To mark holidays in a calendar, perform the following:**
1. In the Calendar View page, select the Month and Year from the respective drop-down lists.

   The calendar for the selected month and year is displayed with weekends and holidays.

2. Click the working day that you want to mark as a holiday.

   The Mark Holiday window appears.

3. Specify the Name for the holiday.

4. Choose the Type as a full day holiday, or first or second half of the day as a holiday.

5. Click Save to mark the holiday.

   Click Reset to reset the form and remove the information you just entered.

   Click Cancel to cancel the action and close the current window.

The new holiday is added to the list of holidays for the selected year and the corresponding date is marked as a holiday on the Calendar View page.

Unmarking holidays

To unmark holidays in a calendar, perform the following:

1. In the Calendar View page, select the Month and Year from the respective drop-down lists.

   The calendar for the selected month and year is displayed with weekends and holidays.

2. Click the holiday you want to unmark.

   The Holiday Details window appears.

   The Date, Name, and Type are displayed as read-only.

3. Click Unmark Holiday to remove the holiday.

   Click Cancel to cancel the action and close the current window.

The holiday is removed from the list of holidays and the corresponding date is marked as a working day on the Calendar View page.

Note: To change the details of a holiday, you must unmark it first and then mark the day as holiday with the required details.

From the Calendar Details page

From the Calendar Details page you can set working time and non-working time.

To set time:

1. Click Preferences > Calendar.

   The Calendar View page appears.

2. Click the Calendar Details link.

   The Calendar Details page appears.

3. In the General tab, edit the relevant data:

   a) Add or edit Description.
b) Select the geographical time zone to be used for the business calendar from the *Time Zone* drop-down list.

c) Define the Year Range for the business calendar by selecting the year from the *From* and *To* drop-down lists.

d) Define the Regular Business Hours by selecting from the *Start Time* and *End Time* drop-down lists.

e) Define the Mid-Day Break by selecting from the *Start Time* and *End Time* drop-down lists. Mid-day Break hours are considered as non-working time.

4. Click the *Working Time* tab.
   You can define working time if you want to specify business hours different than the regular business hours defined in the General tab. For more information, see Managing working time on page 102.

5. Click the *Non-working Time* tab.
   If you want to specify a holiday or weekend, then you can define it in the Non-working Time tab. For more information, see Managing non-working time on page 103.

6. Click *Save* to update the calendar.
   Click *Reset* to reset the form and remove the information you just entered.
   Click *Cancel* to return to the Calendar View page. From this page, you can mark or unmark holidays as described in Editing your calendar on page 100.
   Click *Restore Default Calendar* to restore the calendar to its original settings (as defined by your Business Process Server Administrator).

### Managing working time

**To manage working time:**

1. In the *Calendar Details* page, click the *Working Time* tab to display working time details.

2. To add to the list, click *Add Working Time*.
   
The *Add Working Time* window appears.
   
a) In the Day/Date panel, specify whether you want to add working time for a specific day of the week or a specific date by selecting the *Day* or *Date* option.
   
   Then depending on your selection, specify either of the following options:

   • Specify the day of the week from the *Day* drop-down list.

   • Specify the date by selecting appropriate values in the *Year*, *Month*, and *Date* drop-down lists.

   b) Define the working hours by selecting from the *Start Time* and *End Time* drop-down lists.

   When you add a working time, it takes priority over the regular business hours for that day. Hence, while defining the working time, you may also must include the regular business hours. For example, if your regular working hours on a particular day are 09:00 to 18:00, and you want to indicate additional working hours from 18:00 to 20:00, then you should define the working time as 09:00 to 20:00.

   c) Click *Save* to add the new working time and return to the previous page.

   Click *Save & Add New* to save the current working time and continue adding another working time.
Click **Reset** to reset the form and remove the information you just entered.

Click **Cancel** to cancel the action and close the current window.

The new working time is added in the Working Time list.

---

**Note:** The non-working time has priority over the working time. Working time defined for a weekend or holiday is not considered while calculating the due date.

---

3. To edit working time, click the **Day** or **Date** of the existing working time.

The **Working Time Details** window appears.

a) Edit details as required.

b) Click **Save** to update the working time and return to the previous page.

   - Click **Reset** to reset the form and remove the information you just entered.
   - Click **Delete** to remove the working time entry.
   - Click **Cancel** to cancel the action and close the current window.

   The working time is updated in the Working Time table.

---

**Note:** If you change the working hours of the existing entry, then it is saved as the same working time entry in the list. If you change the day or date, then it is saved as a new working time entry in the list.

---

4. To delete one or more working time entries, select from the list, and click **Delete Working Time**.

A confirmation prompt is displayed. After you confirm, the selected entries are removed.

---

**Managing non-working time**

**To manage non-working time:**

1. In the **Calendar Details** page, click the **Non-working Time** tab to display non-working time details.

2. To add to the list, click **Add Non-working Time**.

   The **Add Non-working Time** window appears.

   a) In the **Name** box, specify a name for the non-working time.

   b) Select the following options depending on the type of non-working time you want to define.

   ---

<table>
<thead>
<tr>
<th>Type</th>
<th>What To Do</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekend</td>
<td>• Click <strong>Weekend</strong> option.</td>
<td>All Sunday OR Second Saturday</td>
</tr>
<tr>
<td></td>
<td>• Select the day of the week from <strong>Day</strong> drop-down list.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Select the occurrence (All, First to Fifth, Last) from <strong>Occurrence</strong> drop-down list.</td>
<td></td>
</tr>
</tbody>
</table>

---
<table>
<thead>
<tr>
<th>Type</th>
<th>What To Do</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date-specific Holidays</td>
<td>• Click <strong>Holiday</strong> option.                                                                                                                                  • Select the type (Full day, First Half, or Second Half) from <strong>Type</strong> drop-down list.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Select the year, month, and date from the <strong>Year</strong>, <strong>Month</strong>, and <strong>Date</strong> drop-down lists.</td>
<td>New Year Day (1st January of every year) OR Thanksgiving Day (4th Thursday of November of every year)</td>
</tr>
<tr>
<td>Date-specific OR Day-specific Recurring Holidays</td>
<td>• Click <strong>Holiday</strong> option.                                                                                                                                  • Select the type from <strong>Type</strong> drop-down list.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Select the <strong>All</strong> option from <strong>Year</strong> drop-down list.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Select the month from <strong>Month</strong> drop-down list.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Select <strong>Date</strong> option and then the date from the list to specify a date-specific recurring holiday OR</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Select <strong>Day</strong> option and then select the day and occurrence from the drop-down list to specify a day-specific recurring holiday.</td>
<td></td>
</tr>
</tbody>
</table>

c) Click **Save** to add the new non-working time and return to the previous page.  
Click **Save & Add New** to save the current non-working time and continue adding another non-working time.  
Click **Reset** to reset the form and remove the information you just entered.  
Click **Cancel** to cancel the action and exit the current window.  
The new non-working time is added in the Non-working Time list.

3. To edit non-working time, click the **Name** of the existing non-working time.  
The **Non-working Time Details** window appears.  
a) Edit details as required.  
b) Click **Save** to update the new non-working time and return to the previous page.  
Click **Reset** to reset the form and remove the information you just entered.  
Click **Delete** to remove the non-working time entry.  
Click **Cancel** to cancel the action and exit the current window.

4. To delete one or more non-working time entries, select from the list and click **Delete Non-working Time**.  
A confirmation prompt is displayed. After you confirm, the selected entries are removed.
Glossary

**ACL manager**
In Business Process Server, Access Control List Manager provides a finer, more precise control over user access rights for resources and actions.

**Activity workstep**
In Business Process, the basic unit of work; must be performed by one or more human performers (valid individual user, multiple users or user group).

**Adapter**
A Java class that integrates remote, third party classes and actions with Business Process. An adapter can automate certain functions and tasks performed by a remote server or other external systems.

**Administration**
A module in Business Process Portal enabling the administrator to perform tasks such as installing/uninstalling applications, modifying configuration parameters controlling Business Process operations, and manage users, groups and access control. The Administration module is visible only to application users who have permissions to access it.

**Application**
In Business Process, an application is an installed, executable business process that automates a business flow.

**Balanced scorecard**
A management application in the Management module that measures performance by analyzing how an organization’s business activities help it achieve its strategic goals. The Balanced Scorecard provides an analysis from a range of perspectives.

**BAM**
Business Activity Management combines Business process management with strategic and analytical information on specific business performance indicators, providing real-time status information and identifying critical events to assist senior management in making informed business decisions.
BPM Events
A Business Process Server component that provides an open event-driven rule engine to formulate and enforce policies in business applications.

BPM Webflow
A Business Process Server component that enables users to develop customizable, sophisticated presentation flows for business processes, install them as Web applications, and execute them on their Web browsers.

BPEL
BPEL (Business Process Execution Language) for Web services is an XML-based language designed to enable task-sharing for a distributed computing or grid computing environment - including across multiple organizations - using a combination of Web services.

BPMN
BPMN (Business Process Modelling Notation) provides businesses with the capability of defining and understanding their internal and external business procedures through a Business Process Diagram giving organizations the ability to communicate these procedures in a standard manner.

BP Server
A Business Process Server component that provides a flexible, lightweight, scalable workflow process engine for intranets, extranets, and the Internet.

Business calendar
A Business Process Server feature that accurately calculates the Due Date of tasks, and provides support for multiple business calendars across different time zones.

Business flow
The logical sequence of process activities, related to one another by a triggering activity, to achieve an outcome. It represents a business process that begins with a commitment and ends with the termination of that commitment. In Business Process Server, business flow includes Workflow (the flow of all human-performed activities), integration flow (the flow of activities performed by systems) and presentation flow (from a user’s viewpoint, the flow of data from one Web page to the next).

Business logic
The control flow and information flow among worksteps that define a business process.

Business object
A representation of an activity in the business domain, including its name, definition, attributes, behavior, relationships and constraints.

Business process
A process involving multiple worksteps in the form of operations, interactions and notifications performed by a user, group of users, an external adapter, or a script.

Business Process Server application
An application is an implementation of a business process. It can contain one or more process templates, performers, adapters, customized forms or rules. An application can be published, installed and run on BP Servers. In Business Process Server, an application is an installed, executable business process that automates a Workflow.
Business Process Server Web services
A Business Process Server component that allows application developers to: a) publish their applications as Web services, and b) find and convert other available Web services on the Internet into Business Process Server applications.

Business Process Portal
A Business Process Server component that offers users, managers, administrators and developers a unified, customizable portal for single sign-on access to all Business Process Server functionalities to which they are granted permission.

Business process management
The concept of guiding work activities through a multi-step business process in order to improve performance and reduce costs within and across functional business units.

Business Process Modeler
A stand-alone component that enables users to design templates for basic business processes.

Business rule
A combination of elements, including validation edits, logon verifications, database lookups, policies and transformations, that represent an enterprise’s way of doing business.

Control flow
The sequences of worksteps and workstep conditions, as defined in a process template in Progress Developer Studio for OpenEdge or Business Process Modeler.

Dashboard
A Business Process Server feature that provides a graphic overview of the status of several business processes on a single Web page, enabling users to monitor the progress of each process. Users can view business processes across all applications or for a selected application.

Dataslot
A data placeholder that persists through the entire process and defines the information flow of the business process. Dataslots are associated with processes, where they can add information into (Input type) or out of (Output type) worksteps, and appear as editable or read-only fields on a user’s interface.

Expression editor
A Business Process Server tool that enables users to define complex conditional expressions within a Decision gateway to support their business requirements.

Group
In Business Process Server, an entity that has as members valid users or other groups who perform related work and have authorized access to specific components.

Heatmap
A Business Process Server feature that provides a convenient, graphical tool for managers to visually locate the bottlenecks in the process execution. It helps managers to get an overview of the status of the currently active instances, identify suspended instances, and analyze the history of the completed instances.

Home
A module in Business Process Portal through which users interact with Business Process Server. Using the Home module, users complete entries to various tasks and applications, update profile, set preferences, and link to the support infrastructure required to achieve these tasks. The Home module is the primary interface for application users.
Infopad
In Business Process Server, a data structure used to capture business metrics, typically displayed as a table with one or two dimensions.

Instance
An individual object within a specific class. In Business Process Server, a self-contained unit that is created each time you use a process template to run a Business Process Server application.

KPI
Key Performance Indicator, used in the Balanced Scorecard system, that provides the data translating enterprise goals into a set of measurable objectives.

Managed Adapter
In Business Process Server, a Managed Adapter is an implementation of an adapter interface that facilitates data exchange between Business Process Server processes and external applications.

Management
A module in Business Process Portal enabling the managers to query, report, and control processes and resources for application users. The Management module is visible only to application users who have permissions to access it.

Migration
The process of moving from the use of one operating environment to another operating environment that is typically seen as improvement. Migration can involve moving to new hardware, new software, or both. It may involve a new application, another type of database, or a redesigned network. Migration is also used to refer simply to the process of moving data from one storage device to another. Business Process Server supports data migration as well as application migration.

Performer
An entity that executes a workstep. Depending on the workstep type, the performer can be a human user, a group of users, an adapter or other external performer, or a script.

Presentation flow
The flow of information and user input from one interface to the next. Typically related to a single Activity workstep in the process and generated in a BPM Webflow environment.

Process engine
Orchestrates the execution of business processes and also coordinates conversations among process engines based on public processes, which forms the backbone of global business collaboration.

Process refresh
A Business Process Server feature for replacing the installed process without versioning, facilitating the running process instances to refresh and seamlessly adapt to the new Workflow.

Process template
In Business Process Server, a model of business flow that includes worksteps, connectors and dataslots. After users publish and install it as an application in Business Process Server folder structure, they can use the application to create process instances.

Progress Developer Studio for OpenEdge
An Integrated Development Environment for Business Process Server that enables application users to develop and publish a Business Process Server application without leaving the development environment.
Role

The actions and activities assigned to a valid application user who is a member of a group. In Business Process Server, only members of a group can be assigned a role. A role indicates the relationships of the user in a group context.

Rollback

In Business Process Server, a feature that restarts the Workflow from a workstep previously selected as the rollback point in the process, performed automatically in the event of a failure.

Rule wizard

An interactive utility that enables application users to quickly develop rules that can be applied to a business process.

Swim lanes

Used in Workflow diagrams to organize complex processes across functional boundaries. For example, seen as horizontal lines on a process map, swim lanes can be used to place individual task steps into different categories that depend on task ownership.

Task

In Business Process Server, a performer is assigned one or more work items that the performer sees as tasks. There are two types of tasks: Assigned, which are assigned specifically to you; and Available, which are available to be performed by you or other members of your user group.

User

In Business Process Server, a valid human performer with authorized access to specific modules.

Workflow

The logical sequence of activities performed by human performers. Workflow includes the tasks, procedural steps, organizations or people involved, required input and output information, and tools needed for each activity in a business process.