

Console Menus

- Dashboard
- Tasks
 - My Tasks
 - My Team Tasks
 - Task Searches
- Community
 - My Pages
 - My Team Pages
 - Shared Pages
- Process Management
 - My Processes
 - Process Definitions
 - PI Searches
 - PD Searches

Dashboard Preferences

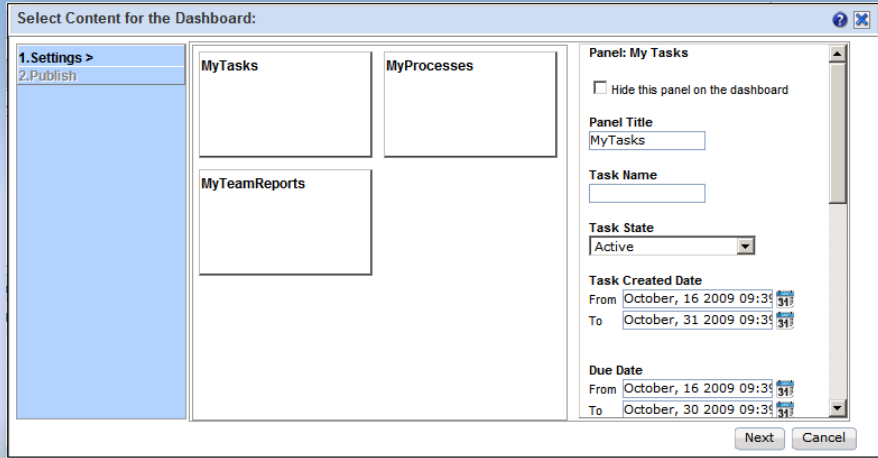
- Users can configure their dashboard
- Configuration is stored in user profile.

- Edit Dashboard Name
- Show/Hide Panels
- Configure each Panel
 - Name
 - Data Displayed

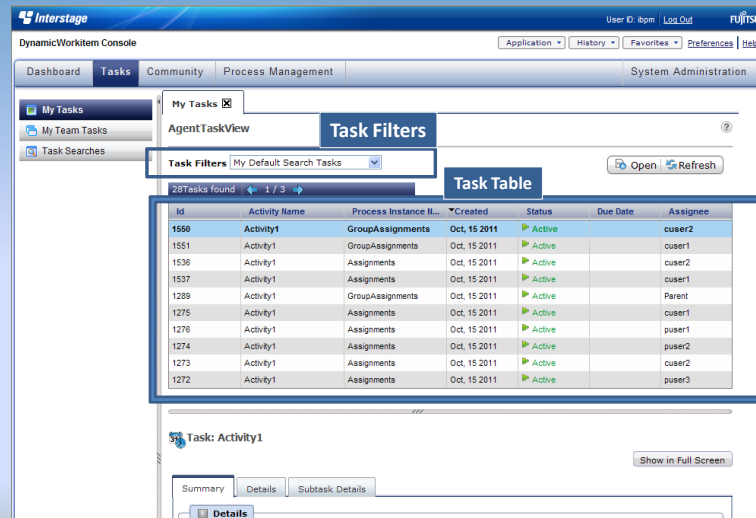
Dashboard Preferences



- The user can set preferences such as “task filtering” and selecting which components to show.



My Tasks



Task Management

■ Filters

- My Tasks
 - Active, Accepted, Declined, Completed, Inactive, Overdue, Waiting, Future
- All Tasks
 - Future, Inactive

■ Details

- Summary
 - Task summary, actions and choices
- Details
 - Task form, data, attachment, choices
- Subtask Details
 - Create, edit subtask

Task Summary

The screenshot displays the 'Task Summary' interface. At the top, there are three tabs: 'Summary', 'Details', and 'Subtask Details'. The 'Details' tab is selected. Below the tabs, there is a 'Details' section with a list of task attributes and their values:

Status	Active
From	ibpm
To	cuser2
Date	October, 15 2011 14:20:05
Process Instance	GroupAssignments
Due Date	
Description	
Priority	8

Below the form, there is a toolbar with the following buttons: Accept, Reassign, Decline, Suspend, Resume, Add a Subtask, and Recall. At the bottom, there is a 'Make Choice' section with a button labeled 'Arrow2'.

Task Detail

The screenshot shows the 'Task Detail' interface with three main sections: Attachments, Comments, and Make Choice. At the top, there are tabs for 'Summary', 'Details', and 'Subtask Details', and a 'Jump To' dropdown menu set to '-Select One-'. The 'Attachments' section has an 'Add Attachment' button and a message: 'No attachments available in this Task'. The 'Comments' section has a text input field and an 'Add Comment' button. The 'Make Choice' section has a button labeled 'Arrow2'. Each section has a 'Back to top' link.

Default Form

- Default Form is created when no Form is assigned
- Displays all UDAs

The screenshot shows the 'Default Form' interface. It has a 'Default' tab and a 'Save' button at the bottom. The form contains several input fields: 'creditVolume' (0), 'assurance' (0), 'coverage' (80), 'result' (a text area containing '<?xml version="1.0" encoding="UTF-8"?><Body/>'), 'Borrower' (a dropdown menu), and 'applicant' (a dropdown menu).

Attachment Name	Actions
New Attachment	Checkout Check In Remove from Process Instance

- Add attachments to process
- Attachments are shared with all process users
- Check-in/Check-out functionality depends on DMS feature.

■ Add Attachment

■ Attachment Name

■ File Source

- Add New
 - Add new document to DMS and attach
 - Source: location of document
 - Target: location in DMS to store
- Browse Existing
 - Browse existing documents from DMS and attach.
 - Opens DMS browser to select the document

Add Attachment to Task

Name:

File Source: Add new Document Browse existing Documents

Source:

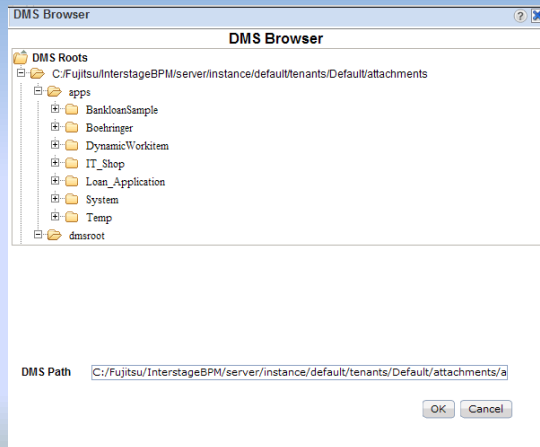
Target:

Overwrite existing Documents

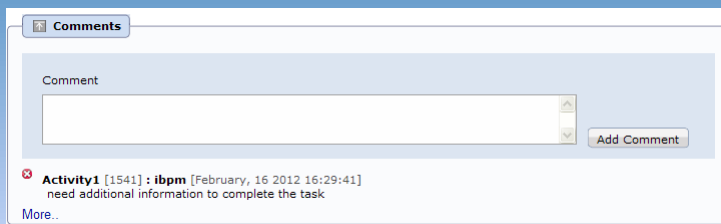
Task Detail – Manage Attachment

■ DMS Browser

- One or more DMS can be configured for storing documents
- DMS can be a file system or WebDAV supported repository



Task Detail – Comments



■ Users working on task may write comments

- Share information with other users
- Additional information before reassigning task to a different user
- Can be also used to log user feedback for future updates.

My Team Tasks - Overview

- Team Manager/Supervisor can manage team tasks.
 - Check workload on team members
 - Validate team performance
 - Assists in better planning
 - Re-Distribute tasks among team members
 - Plan for future tasks, holidays, vacations.

Name	Title
Keith Swenson	Manager
Shamim Quader	Engineer – Product Development
Kumar Raja	Engineer – Product Development
Sameer Pradhan	Engineer – Product Development
John Smith	Engineer – Product Development

My Team Tasks

- The manager's view of the team's tasks.

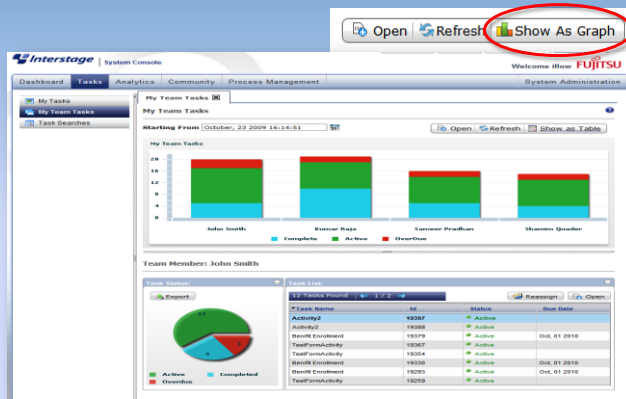
The screenshot displays the 'My Team Tasks' interface. At the top, there's a navigation bar with 'Dashboard', 'Tasks', 'Analytics', 'Community', and 'Process Management'. The main content area is titled 'My Team Tasks' and includes a search filter for 'Starting From' (October, 23 2009 15:11:13). Below this is a table with 4 members found:

Name	Title	Complete	Active	Overdue	Total	Next Due Date
John Smith	Engineer - Product Devpt	5	12	3	20	Oct, 01 2010
Kumar Raja	Engineer - Product Devpt	18	9	2	21	Oct, 01 2010
Sameer Pradhan	Engineer - Product Devpt	5	9	2	16	Oct, 01 2010
Shamim Quader	Engineer - Product Devpt	4	9	2	15	Oct, 01 2010

Below the summary table, the 'Team Member: John Smith' view is shown. It includes a 'Task Status' pie chart and a 'Task List' table. The 'Task List' table has columns for 'Task Name', 'ID', and 'Status'. A 'Reassign' button is highlighted with a red circle in the interface. Callout boxes point to the 'Team Task list' and the 'Reassign' button.

My Team Tasks

- Show as Graph: Toggles the screen between the table and the graphical view



My Team Tasks

- When a team manager logs-in to the console, he/she can view his/her tasks and team's task.
- By default, users will see their reports for the last 7 days.
 - Change the date for more history data

■ Team Configuration

- User accounts can be assigned a *manager* by entering Manager's username in the "manager" attribute

User ID : cuser1

Details Groups Custom Fields

manager

cn

title

Save Cancel

Tenant Property
"managerattribute" = "myManager"

- "manager" attribute is configurable.
- map an already existing LDAP attribute to the "managerattribute" attribute or define an attribute called 'manager'.

- Create custom search queries and save for future use
- Replace the task list table in "My Task" with custom list table
- Search Criteria
 - Task Properties
 - Process Definition and Process Instance Name
 - Assignee
 - UDA values
 - Perform sorting
- Display UDA values in result list table

Process Definition

- The table by default shows all process definitions owned by user.

Process Definition Name	Id	Version	State	Owner
BankLoan	3145	1.0	Draft	ibpm_server2
CompPD	3221	1.0	Draft	ibpm_server2
Detailed Design	3332	1.0	Draft	ibpm_server2
Development	3254	1.0	Draft	ibpm_server2
Structural Design	3321	1.0	Draft	ibpm_server2
task0	3343	1.0	Draft	ibpm_server2

Process Definition Details - Summary

- Summary of PD and available Actions

Name BankLoan

ID 3145

Description This is the bank loan process desi

State Draft

Owner ibpm_server2

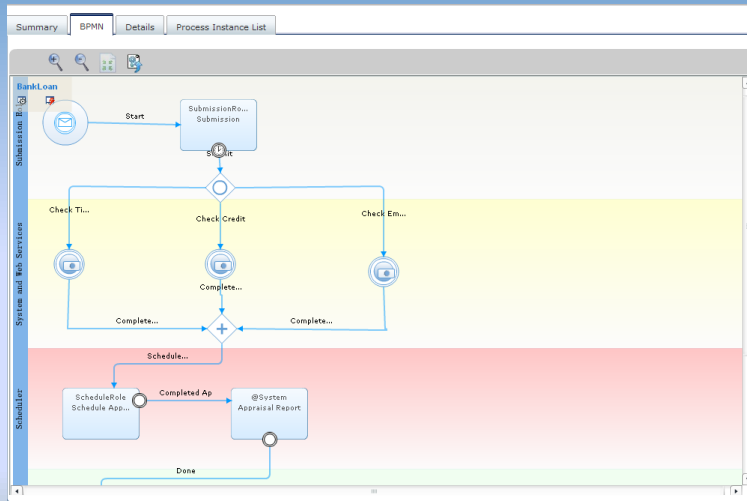
Version 1.0

Priority 8

Use same SubProcess definition version false

Process Definition Details: BPMN

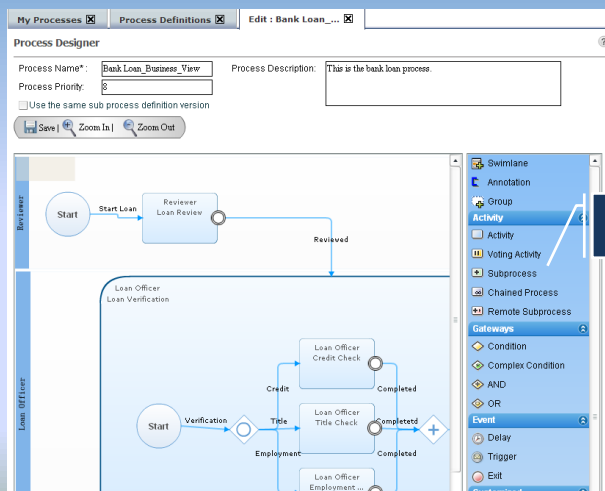
■ BPMN Flash Viewer



Process Definition Details: (BPMN)Create/Edit

■ Process Definitions can be edited and created in BPMN Flash Editor

- Process definition cannot be edited if it has active Process Instances.



- Details tab
 - Shows details about process definition in text mode
 - Users can access information about nodes, actions, timers everything.

- Process Instance List
 - Shows list of process instances created from selected process definition.
 - Helps assess the change impact.

- See the list of process instances
- Default view shows only PIs owned by user
- Filters:
 - My Processes
 - Active, Inactive, in Error State, *Dynamic*
 - All Process
 - Active, Inactive, *Archived*, in Error State





- Process Instance Details
 - Summary
 - Details
 - BPMN
 - History

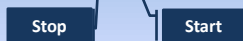
■ Editing Process Instance

- A process instance can be edited (structurally) without editing the Process Definition
- Useful in scenarios where urgent fixes/changes are required to the running processes
- Editing PI results in a new PD with same design as edited PI.
- New PD's status is "Private" (private for PI)
- Private PD can be upgraded to Draft and Publish.

■ Process Details

■ Node Instance Details

Id	Activity Name	Action	Status	Created	Responsible
657	Start		Closed		ibpm
658	Submission	 	Error		
659	Or Name	 	Not Started		



- Shows list of all nodes and status
- Allows to execute nodes in ad-hoc manner (*useful for ad-hoc processes where activities do not depend on each other*)
- Process Instance Attributes
- Timer Instance List
- Attachment Panel
- Comment Panel


Process Instance Details: History

- Shows process execution history/audit

Process History
Display all the events related to the specified process.

Process Activity UDA

5 Records Found ← 1 / 1 →

History id	Timestamp	Activity Type	Event Type	Activity	Responsible	Status
696	October, 03 2011 12:59:33	Activity	Start	Arrow 'Start' transition to node	Process	
695	October, 03 2011 12:59:33	Activity	__NodeClosed	Arrow '.___NodeClosed' transition to node	Process	audit
694	October, 03 2011 12:59:33	Activity	__Activate	Start node activated.	ibpm	handled
693	October, 03 2011 12:59:33	Process	__Start	Process instance was started.	ibpm	handled

Error Message

```
Execution of event failed. Event code 'Activate', process instance id '65'.
Could not handle requested events.
Could not handle requested events.
Could not retrieve the users for the group 'SubmissionRole'.
java.lang.NullPointerException
```

OK

- Helps tracking changes to
 - Process
 - Nodes
 - UDAs
- Shows error details if node fails

Process Ownership

- Process owner has certain privileges over other users
- Process Definition owner:
 - User who creates Process Definition becomes the owner of Process Definition
- Process Instance owner
 - Defined in process definition properties (Owner Group or "OG")
 - Can be assigned in Owner Action (OA)
 - If instance owner is not defined, definition owner becomes instance owner
 - If owner is defined in OG as well as OA
 - User/group from Intersection of OG and OA is assigned as owner
 - If intersection is empty, definition owner becomes owner of instance.

Process Ownership



- Users can see and edit only definitions and instances owned by them
- Filters “All xxx Process” are available only to administrators
- Filters “All xxx Tasks” are available only to owners and admins

- Only Owners (and Administrator)
 - Can edit definition and instances
 - Can publish process definitions
 - Can **add comments** to process instance (also the “task assignees” and “*process initiator*”)
 - Can change ownerships

Process Searches



- Process Definition and Instance search allows searching for processes using custom queries
- Queries can use UDA name-value, process properties etc as search parameters
- Create and Save searches and set them as default
- Customize default list view to add/remove columns, add UDAs in table for more business visibility.

- Create pages using Wiki syntax
- Share pages with others easily to enhance collaboration

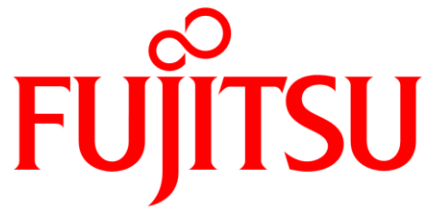
1 Page(s) found

Name	Owner	Modified Date	Modified By	Created Date
Sample.sp	cuser1	Feb, 17 2012	cuser1	Feb, 17 2012

Sample.sp [Edit](#)

here is how to complete this work

1. enter information in form
2. get data from XXXX
3. complete the task before 2 days



shaping tomorrow with you