TIBCO iProcess™ Workspace Lite

User's Guide

Software Release 1.2
October 2010

TIBCO
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Important Information

Contents

Preface

This user's guide describes the use of **TIBCO iProcess Workspace Lite**, a web-based Business Process Management (BPM) application that automates the movement of data/information through your business process.

This product has been specifically engineered to be in compliance with disability discrimination legislation requirements (e.g., section 508 of the Rehabilitation Act of 1973 in the U.S., the W3C Web Accessibility Initiative (WAI), and the Disability Discrimination Act (DDA) in the UK). It allows persons with disabilities to access iProcess BPM functionality using standard accessibility aids, such as screen readers and magnifiers. It also allows selection and entry of data through the keyboard, as some disabilities prevent use of a mouse.

Topics

Related Documentation

This section lists documentation resources you may find useful.

TIBCO iProcess Workspace Lite Documentation

The following documents comprise the TIBCO iProcess Workspace Lite documentation set:

- *TIBCO iProcess Workspace Lite Installation Guide* - Read this manual for information about installing TIBCO iProcess Workspace Lite.
- *TIBCO iProcess Workspace Lite Release Notes* - Read the release notes for a list of new and changed features. This document also contains lists of known issues and closed issues for each release.
- *TIBCO iProcess Workspace Lite User's Guide* - Read this manual for instructions on using the iProcess Workspace Lite application.
- *TIBCO iProcess Workspace Lite Customization Guide* - This manual provides information about customizing iProcess Workspace Lite.

How to Contact TIBCO Support

For comments or problems with this manual or the software it addresses, please contact TIBCO Support as follows.

- For an overview of TIBCO Support, and information about getting started with TIBCO Support, visit this site:

  http://www.tibco.com/services/support

- If you already have a valid maintenance or support contract, visit this site:

  https://support.tibco.com

  Entry to this site requires a user name and password. If you do not have a user name, you can request one.

Chapter 1 Introduction

This chapter provides an introduction to the TIBCO iProcess Workspace Lite product.

Topics

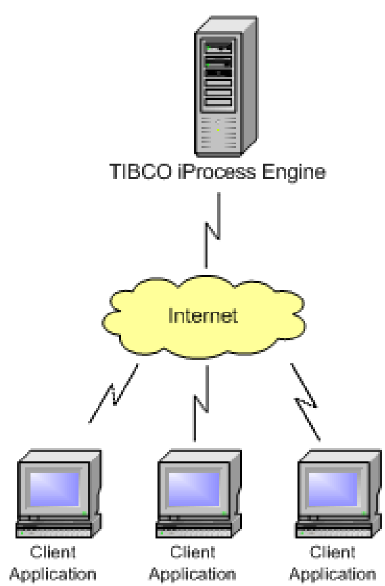
Overview

TIBCO offers a product called the TIBCO iProcess Workspace (Browser), which is a full-featured Business Process Management (BPM) client application.

The TIBCO iProcess Workspace Lite application, which this guide describes, provides a sub-set of the functionality offered by the TIBCO iProcess Workspace (Browser) application. TIBCO iProcess Workspace Lite has been specifically engineered to be in compliance with disability discrimination legislation requirements (e.g., section 508 of the Rehabilitation Act of 1973 in the U.S., the W3C Web Accessibility Initiative (WAI), and the Disability Discrimination Act (DDA) in the UK). It allows persons with disabilities to access iProcess BPM functionality using standard accessibility aids, such as screen readers and magnifiers. It also allows selection and entry of data through the keyboard, as some disabilities prevent use of a mouse.

The TIBCO iProcess Workspace Lite is a Business Process Management (BPM) application that runs over the Internet or an intranet. As a BPM application, it automates the movement of data/information through your business process, whatever your business may be. It may automate the process of filing an insurance claim, a loan application, or any process that has multiple tasks.

Figure 1 Overview of TIBCO iProcess Workspace Lite System



The TIBCO iProcess Workspace Lite *client application* as it is called, is run in a browser (e.g., Microsoft Internet Explorer). You connect to a TIBCO iProcess Engine over the Internet or an intranet by entering a web address that is determined by the location at which your TIBCO software is installed.

After connecting to the TIBCO iProcess Engine by entering a valid user name and password, you will be presented with screens that allow you to perform the functions your specific application was designed to perform. Each time you initiate an action in your client application (i.e., by clicking on something), a request is sent to the TIBCO iProcess Engine instructing it to either send data to the client application or to perform some sort of action (e.g., save the data you've just entered).

All data pertinent to your business process is stored in a database on the TIBCO iProcess Engine. The iProcess Workspace Lite provides a way for you to access and manipulate that information via the Internet.

One thing to bear in mind is that you are likely running the iProcess Workspace Lite client application in an *enterprise system*. This means that cases and work items (these are described later) you can see can also be viewed and worked on by other users in the enterprise.

Understanding a Business Process

At the heart of iProcess Workspace Lite is the TIBCO "process," which defines the flow of information in your application. An example of a very simple process is shown below.

Figure 2 Example of a Simple TIBCO Process

Depending on your specific job, you may be asked to:

- **Start a case** - For instance, the example process shown above is used to process a help/support request. Your job may be to "start a new case" of the help process when someone calls for support.
- **Work on an existing case** - If someone who has called for support calls again to find out the status of there call, your job may be to view the case to answer their inquiry. You can "open" an existing case and find out what has taken place so far in that case.
- **Process work items** - A process is made up of a number of **"**tasks**"**, each of which must be completed for the process to move on to the next task. Each of the boxes in the example process above represents a task. When a task is reached in the process flow, a "work item" is created. Your job may be to process work items that appear in your "work item list". For example, work items for the "Help Request" task may be sent to your work item list so that you can open and process them.

The specific functions you perform with the iProcess Workspace Lite application depends on how your system was designed and set up.

The following table provides definitions of terms that are used throughout this document and in your iProcess Workspace Lite application.

Table 1 iProcess Terms

Term	Description
Process	Represents the definition of a business process, which ensures that information flows in a consistent and timely manner through the system. A TIBCO process is defined using TIBCO Business Studio. An example is shown in the illustration above.
Case	This is a particular instance of a TIBCO process. A case is created when a process is “started,” and remains in existence until that instance of the process is purged from the system.
Task	A process is made up of a number of tasks, which define the activities that take place within the flow of a process. Each task defines what must be done, who must do it, and, optionally, a deadline by which it must be done.
Work Queue	This is a list of work items (see below) that are awaiting action. A work queue can belong to an individual user (personal work queue) or to a group of users (group work queue). If it is a group work queue, any user that belongs to that group has access to the work items in that group queue.
Work Item	A work item represents an action item listed in a work queue. It relates to a task in an active case. A user manages the work items in their work queue by performing some sort of action upon them, such as entering data on a form, “closing” it (placing it back in the work queue for further action at a later time), or “submitting” it (completing the required action and sending it on to the next task in the process).

You may not necessarily need to understand the entire structure of the processes you are working on. Generally, users are focused on performing some sort of work on the work items that appear in their work queue. The type of work you perform will depend on the type of business you are in and how your process was designed.

Functions Performed by the TIBCO iProcess Workspace Lite

The following are the types of functions you will typically be performing with TIBCO iProcess Workspace Lite:

- Customize the appearance of the iProcess Workspace Lite screen so that it is easier to view.
- Open and view work queues, which list the work items you are authorized to work on.
- Process work items. This includes:
  - — opening work items.
  - — entering information into forms that are displayed when you open a work item.
  - — “closing” the work item, which saves any entered data, closes the work item, and places it back in the work queue so it can be worked on later.
  - — “submitting” the work item, which saves any entered data, closes the work item, and causes the case to advance to the next task in the process.
  - — "cancelling" the work item, which discards any entered data, closes the work item, and places it back in the work queue so it can be worked on later.
  - — "forwarding" the work item, which removes the work item from your work queue and adds it to the work queue of another user or group.
- List the processes that are available on the system.
- Start a case of a process.
- List the current cases for a given process.
- View the audit trail (case history) for a given case.
- Close a case, which stops the process flow in that case.

These functions are described in the remainder of this document.

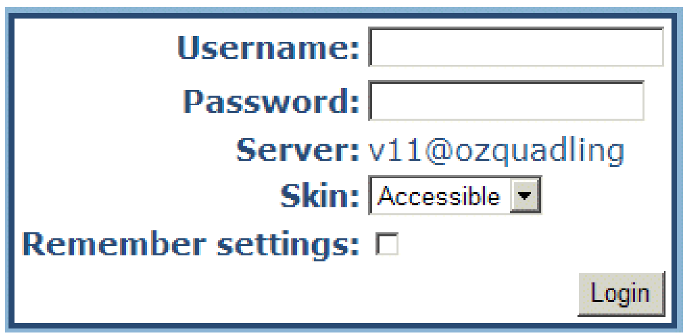
Logging In

Logging in to the TIBCO iProcess Workspace Lite application validates your user name and password to ensure you are authorized to use the system.

Your system administrator will determine how you actually start the iProcess Workspace Lite. It may involve starting a browser and entering a URL (Universal Resource Locator — or "website address"), or you may click on a link on a specified web page.

After the browser connects to the proper web site, you are presented with a login screen.

Figure 3   Login Screen



To log in to the iProcess Workspace Lite application:

1. Enter your user name in the **Username** field.

User names that contain the following special characters are not supported in TIBCO iProcess Workspace Lite: hash (#), percent (%), ampersand (&), or less than (<).

2. Enter your password in the **Password** field.

   Note - The **Server** field indicates the name of the server you are logging into, as well as the computer name on which the server is running. (This information is set up in a configuration file by the system administrator.)

3. Choose the desired skin from the **Skin** field drop-down list.

   For information about the available skins, see Using Skins on page 19.

4. If you would like the system to remember your user name and the selected style (skin), check the **Remember settings** check box. Each time you display

the **Login** screen, the fields will be filled in for you. (It will not remember nor pre-fill the **Password** field.)

5. Click the **Login** button.

Navigation

Every screen provides navigation links that allow you to navigate through the iProcess Workspace Lite application. The following is the main navigation toolbar in the "popular" skin (the specific appearance and location of these links depends on the skin you are using — skins are described later):

Figure 4   Navigation Links

The navigation links provide access to the following:

- **Skip navigation** - Allows a screen reader to skip over hypertext links. For more information, see Skip Navigation on page 9.
- **Home** - Displays the Home page, from which you can select a new skin, or access the iProcess Workspace Lite documentation.
- **Processes** - Displays the process list, from which you can access processes and cases; for information, see Process Lists on page 50.
- **Work** - Displays the work queue list, from which you can access work queues and work items; for information, see Work Queue Lists on page 28.
- **About** - Provides information about the iProcess Workspace Lite application.
- **Logout** - Logs you out of the iProcess Workspace Lite application, and re-displays the Login screen.

Skip Navigation

TIBCO iProcess Workspace Lite provides a "skip navigation" feature that permits a screen reader to skip over navigation links, allowing you to go directly to the content on the page.

To use skip navigation, click on the **Skip Navigation** link. Now, rather than reading the navigation links on the top of the page, your screen reader will go directly to the main content on the page.

Keyboard Usage

All links, data-entry fields, and buttons provided on iProcess Workspace Lite screens and dialogs can be accessed via the keyboard, rather than requiring a mouse.

Pressing the **Tab** key on the keyboard advances the screen cursor through the available links, fields, and buttons on a screen. Pressing **Shift+Tab** moves the cursor in the reverse direction. When the cursor is on a link or button, pressing **Enter** is the equivalent to clicking on the link or button.

Therefore, when this document references "clicking" on a link or button, the link or button can be activated using the method described above, rather than by using a mouse.

Refreshing Information

Each screen in iProcess Workspace Lite that contains a list of information (i.e., the process list, case list, work queue list, work item list, and the case audit trail) is a **snap shot** of the information when the screen was displayed. For example, if you click on a work queue to display a list of work items in that work queue, the list contains all of the work items in that queue at the moment the list was displayed. It is not automatically updated to provide the latest work items. You must “refresh” the screen to get the latest information from the server.

You can easily refresh the screen in Microsoft Internet Explorer by pressing the **F5** function key, and in Mozilla Firefox by pressing **<Ctrl>R**.

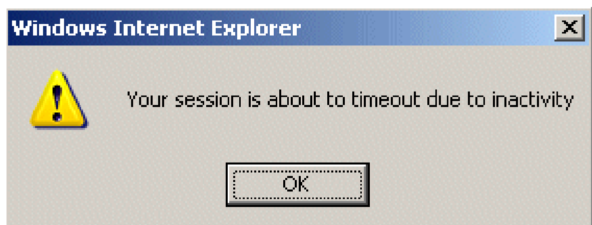
Time-outs

The iProcess Workspace Lite application has a built-in feature that causes it to time-out and disconnect from the server if there is no activity in a specified period of time. The time-out value is set to 20 minutes by default, but can be modified by a system administrator.

Also, a dialog is displayed after 18 minutes of inactivity (also a configurable time), warning you that your session with the server is about to time-out. This dialog provides screen-readers the ability to read the time-out warning rather than experiencing an unexpected session time-out.

If you are approaching the time-out period with no activity, a warning dialog is displayed. For example:

Figure 5 Time-out Warning



Click **OK** to return to the application. If the application has timed out, you will need to log in again.

User Session Activity

The period of time between when you log in and log out is called a “user session”. At any time during your user session, you can display a log that shows activity during the current user session.

To display the session activity log:

1. Click on the **About** link on the TIBCO iProcess Workspace Lite window.
2. From the "About" page, click the **Session Activity** button.

   The following is displayed:

Figure 6 Session Activity Log

Date and Time	Action	Description
2010-09-03 13:05:17	Session Start	Login
2010-09-03 13:05:45	Started Case	Case description: Acura 889-H; Procedure tag: v11|CARPOOL|1|0
2010-09-03 13:06:06	Opened WorkItem	Work Item tag: v11|QUANTITY|swadmin|R|1704|2554|v11|COUNT|0|0; Work Queue tag: v11|swadmin|R
2010-09-03 13:06:20	Kept Work Item	Workitem: v11|QUANTITY|swadmin|R|1704|2554|v11|COUNT|0|0 in v11|swadmin|R
2010-09-03 13:07:06	Forwarded Work Items	Workitems: v11|ORDER|swadmin|R|1703|2553|v11|APPL|0|6 from v11|swadmin|R to v11|franko|R

   This shows a chronological list of all activities performed during the current user session. Note, however, that this log only shows *requests* to the server; it does not show *results*. Therefore, it does not report errors that may be returned by the server.

   This list is cleared upon logout.

3. When you are finished with the session activity log, use the links on the page to move to other parts of the TIBCO iProcess Workspace Lite application.

Atom/RSS Feeds

The work queue list contains an **Atom feed** column with links that allow you to set up an atom feed (also known as an RSS feed) for the desired work queue:

Figure 7 Atom Feed Column on Work Queue List

Status of the last request

Work Queue List:	All work queues in the system.
Status:	The Action was processed successfully.

	Id	Queue Description	User or Group queue	Test or Production queue	Deadlined	Unopened	Urgent	Total	Atom feed
1	bobby	Bobby Miller	User	Production	2	10	0	22	Feed for: bobby
2	Teller Supervisors	Teller Supervisors	Group	Production	0	4	0	4	Feed for: Teller Supervisors

The **Atom feed** column links are used to subscribe to the feed from an atom/RSS feed reader, which allows you to be informed when a change has been made in the work queue (for example, a new work item has been added to the queue) to which you have set up an atom feed.

The exact method you use to set up and subscribe to feeds will differ, depending on the browser and feed reader you are using.

Note that the primary objective is to support atom/RSS feeds from within Microsoft Office Outlook 2007, although any Atom 1.0 reader (for example, Microsoft Internet Explorer 7 or Mozilla Firefox 3) should be usable.

Note, however, that Office Outlook 2007 does not support authenticated feeds (for more information, see http://support.microsoft.com/kb/917125). Because of this, it is necessary to include the user name and password on the feed URL. Therefore, you must decide from a security standpoint whether this is acceptable. If it is, the steps to accomplish this are as follows:

1. Login in to your iProcess Workspace Lite application.
2. Display the work queue list.

3. Right click the **Atom feed** column link for the desired work queue, and copy the shortcut/link:
   - In Microsoft Internet Explorer, the selection is : **Copy Shortcut**
   - In Mozilla Firefox, the selection is: **Copy Link Location**
4. Go to Microsoft Office Outlook 2007 and do the following:
   a. From the **Tools** menu, select **Account Settings**.
   b. On the **RSS Feeds** tab, click **New**.
   c. In the **New RSS Feed** field, paste in the URL that you copied in step 3.
   d. At the end of the URL that you've pasted into the field, add the following:

      &username=*UserName*&password=*Password*

      where *UserName* and *Password* are the login credentials for the work queue for which you are subscribing.
   e. Click the **Add** button.

      The **RSS Feed Options** dialog is displayed
   f. Select/change any of the desired options, then click **OK**.
   g. Click **Close** on the **Account Settings** dialog.

The RSS Feed folder in Microsoft Office Outlook 2007 will now receive feeds informing you of updates to the specified work queue.

If you are setting up feeds in Microsoft Internet Explorer 7, there is no means of editing a URL after subscribing to it, therefore, make sure you add the user name and password to the address prior to subscribing.

Also note that there is an issue when opening work items via an RSS feed if the case has a very large number of fields. The length of the resulting URL can exceed the maximum number of characters allowed by the browser (e.g., approximately 2100 characters for Microsoft Internet Explorer). If the limit is exceeded, the work item does not open when the link is clicked.

Chapter 2 Customizing Appearance

This chapter describes the ways in which you can change the appearance of your iProcess Workspace Lite application screen.

Topics

Introduction

There are several ways in which you can change the appearance of your iProcess Workspace Lite application screen:

- **Using skins** - These provide different color and design schemes so that you can choose the look-and-feel that works for you.

  For more information, see Using Skins, page 19.

- **Changing text size** - You can easily increase or decrease the size of the text displayed on the screen.

  For more information, see Changing Text Size, page 24.

- **Choosing a Language** - If the iProcess Workspace Lite application has been translated into the desired language, you can choose that language from the browser.

  For more information, see Choosing a Language, page 25.

Note - The iProcess Workspace Lite screen appearance can also be customized using “cascading style sheets”. This is something an administrator sets up — for more information, see the *TIBCO iProcess Workspace Lite Configuration Guide*.

Using Skins

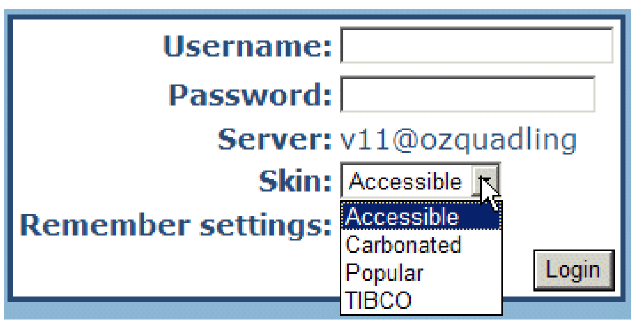
For some people, the use of color is a matter of preference. For others, it is a matter of necessity. Some people with vision impairments require high contrast color schemes while others need to have softer, unsaturated colors and less contrast so as not to suffer a visual "white out." People who suffer eyestrain after even short sessions on the computer find that different color and contrast settings ease the discomfort. The iProcess Workspace Lite application meets this need by offering you a choice of "skins" (additional skins can also be added to the system by an administrator).

A skin is a pre-designed color and layout scheme that can be applied to your iProcess Workspace Lite screens. The idea is to provide different types of appearances, so that you can choose whichever works best for you.

A skin can be chosen in one of two ways:

- From the iProcess Workspace Lite Login screen, as follows:

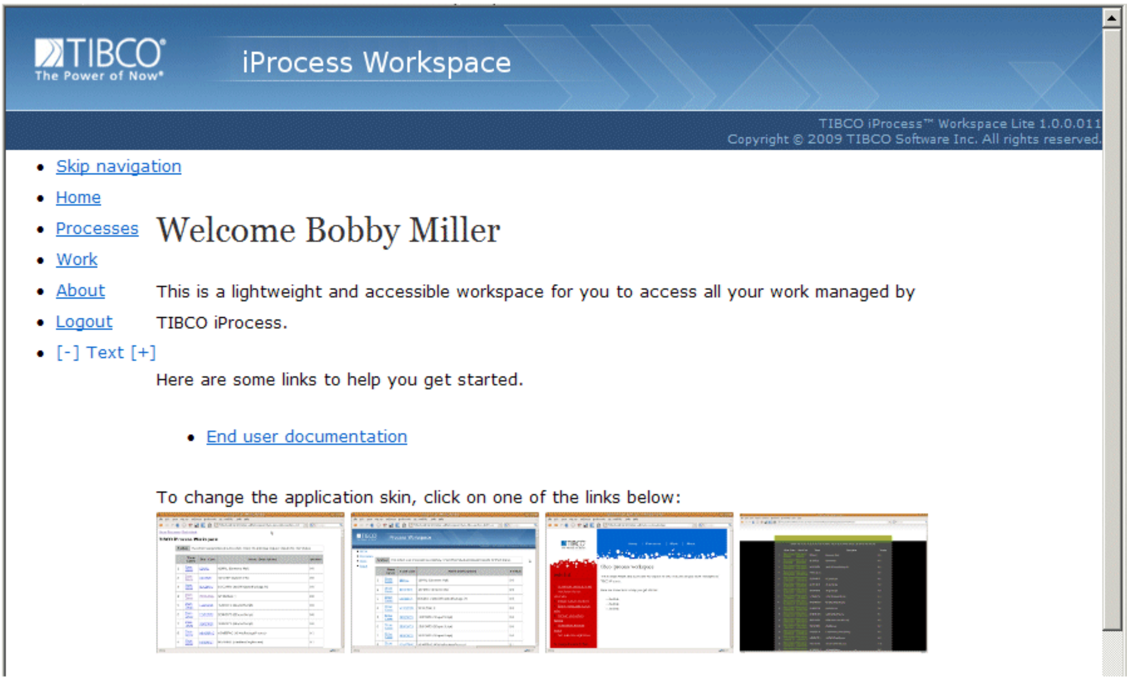
Figure 8 Choosing a Skin from the Login Screen



  To choose a skin from the Login screen, click on the arrow to the right of the **Skin** field. Select the desired skin from the drop-down list.

- From the iProcess Workspace Lite Home page. To display the Home page, click on the **Home** link in the main navigation links. A screen similar to the following is displayed (its appearance will differ, depending on the skin you are currently using):

Figure 9 Choosing a Skin from the Home Page



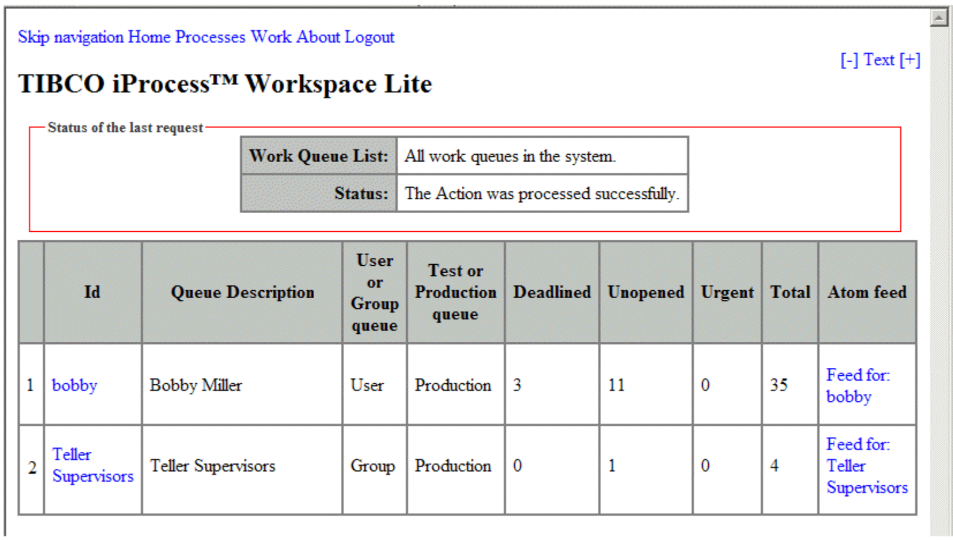
To choose one of the available skins, click on the image that represents the desired skin.

The following subsections describe the skins provided with iProcess Workspace Lite.

Accessible Skin

The Accessible skin displays a minimal amount of images and color. Information is displayed in basic tables. An example is shown below.

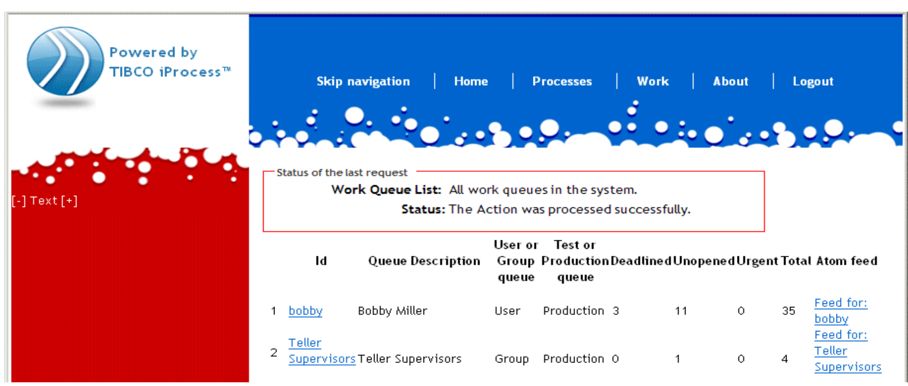
Figure 10   Accessible Skin Example



Carbonated Skin

The Carbonated skin uses a lot of images and color. An example is shown below.

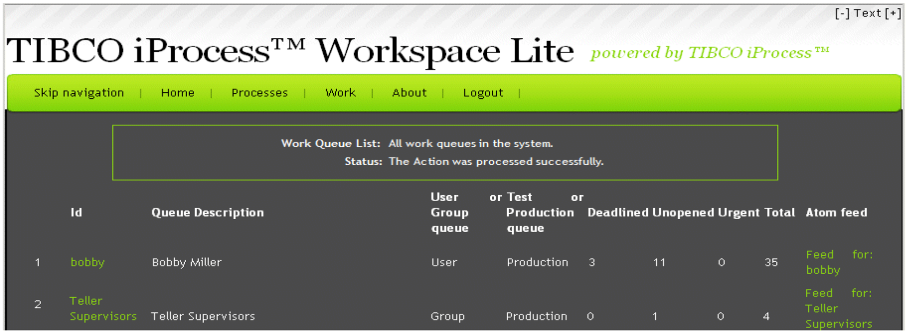
Figure 11   Carbonated Skin Example



Popular Skin

The Popular skin provides high contrast by using white text on dark backgrounds, and dark text on light-colored backgrounds. An example is shown below.

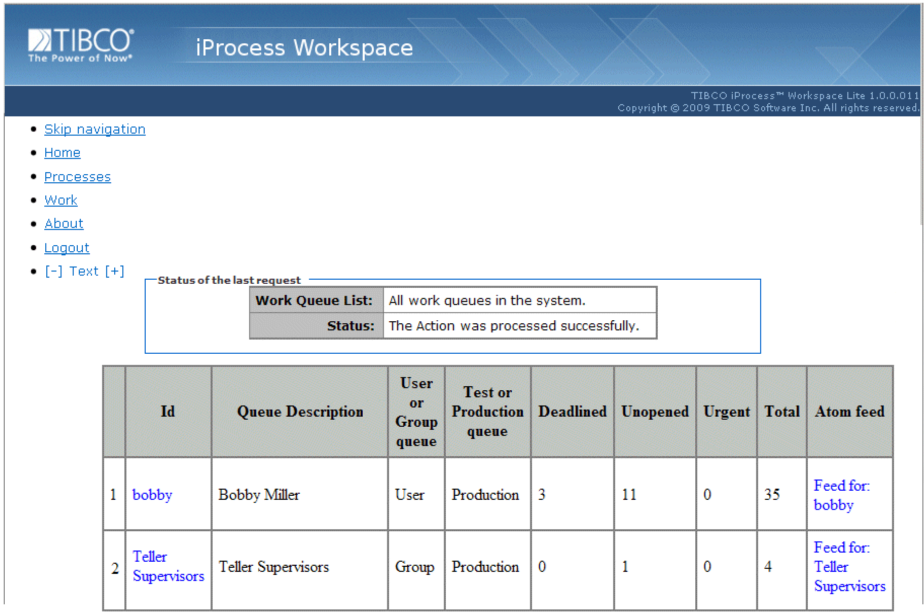
Figure 12 Popular Skin Example



TIBCO Skin

The TIBCO skin is similar to the Accessible skin, that is, it's a very basic layout, although it provides more color.

Figure 13 TIBCO Skin Example



Changing Text Size

There is also a means of changing the size of the text on the screen.

To change text size, locate the text-size control: it's the word "Text" with minus and plus characters to the left and right, respectively. For example:

Figure 14 Text-Size Control

- Click the minus character [-] to display small text.
- Click "Text" for normal-sized text.
- Click the plus character [+] to display large text.

Note - If you use a mouse, you can also increase/decrease the size of the text by using a built-in control in your browser — while holding down the Control key, turn the wheel on the mouse to increase/decrease the size of text in the browser.

Choosing a Language

The way in which you choose a language depends on which browser you are using, as described below.

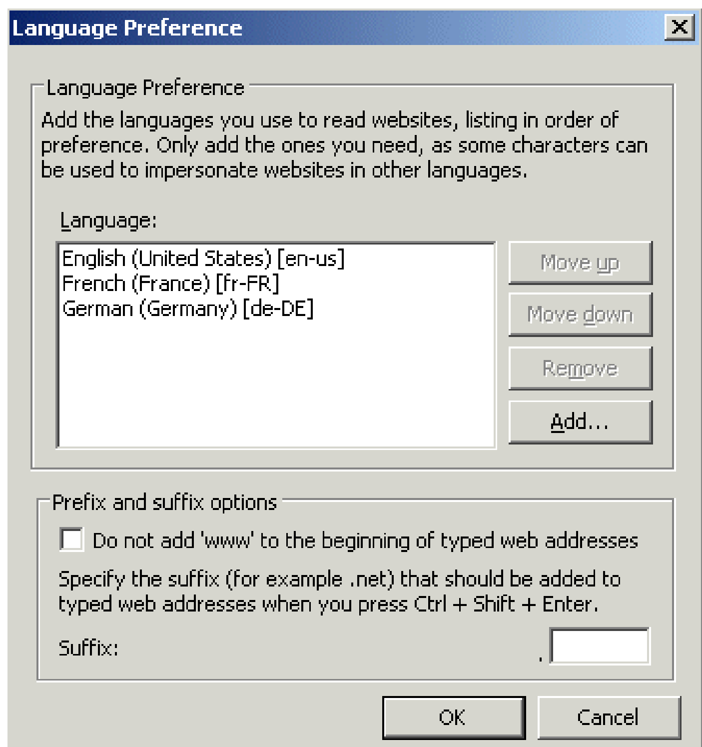
Note that to choose any particular language, a "properties" file must exist for that language. The properties file, which is created/added by an administrator, provides the translated text that appears in the application.

Microsoft Internet Explorer:

1. Select **Internet Options** from the **Tools** menu.
2. From the **General** tab, click the **Languages** button.

   A dialog similar to the following is displayed:

Figure 15 Language Dialog - Internet Explorer 7.0



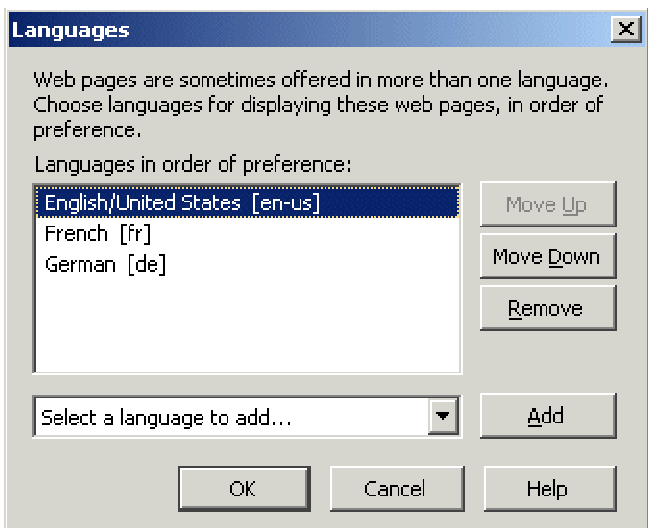
3. If the desired language is not listed, add it by clicking the **Add** button and selecting it from the displayed list.
4. Move the desired language to the top of the list by selecting it and using the **Move up** button.
5. Click **OK**.

Mozilla Firefox

1. Select **Options** from the **Tools** menu.
2. Display the appropriate tab:
   a. If you are using version 3.0, display the **General** tab.
   b. If you are using version 3.5 or 3.6, display the **Content** tab.
3. In the **Languages** section, click the **Choose** button.

   A dialog similar to the following is displayed:

Figure 16 Language Dialog Mozilla Firefox



4. If the desired language is not listed, add it by selecting it from the drop-down list, then clicking the **Add** button.
5. Move the desired language to the top of the list by selecting it and using the **Move Up** button.
6. Click **OK**.

Chapter 3 Work Queues and Work Items

This chapter provides information about how to view and work with work queues and work items.

Topics

Work Queue Lists

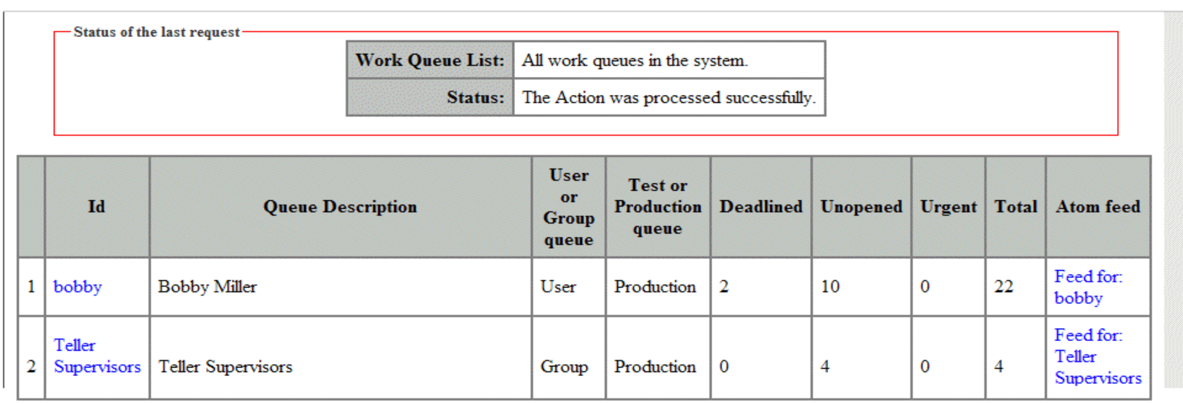
A work queue list is a list of all work queues to which you have access. Choosing a work queue from the list causes a list of work items in that work queue to be displayed.

There are two types of work queues:

- **User Queue** - Every user has his/her own user work queue. All work items that are sent to you, appear in your user work queue.
- **Group Queue** - If you are a member of a group, you will also have access to a group work queue of that same name. For example, if you belong to the "Teller Supervisors" group, you will have access to the Teller Supervisors group work queue (as in the example below). All work items that are sent to that group appear in the group's work queue. As a member of that group, you can work on those work items.

To display the work queue list, click on the **Work** navigation link in iProcess Workspace Lite. A screen similar to the following is displayed (note that your screen may appear different, depending on the skin you are using, and any appearance customization that was implemented on your system).

Figure 17 Example Work Queue List


Status of the last request

Work Queue List:	All work queues in the system.
Status:	The Action was processed successfully.

	Id	Queue Description	User or Group queue	Test or Production queue	Deadlined	Unopened	Urgent	Total	Atom feed
1	bobby	Bobby Miller	User	Production	2	10	0	22	Feed for: bobby
2	Teller Supervisors	Teller Supervisors	Group	Production	0	4	0	4	Feed for: Teller Supervisors

The **Status** field in the box above the work queue list will inform you if there was a problem displaying the work queue list.

The work queue list shows you all of the work queues to which you have access. It contains the following information:

- **Id** - The name of the work queue. This is the same as the name of the user or group who owns the work queue. For example, if your user name is bobby, there will be an entry for bobby in the list. If you are a member of the group "Teller Supervisors", there will be an entry for the Teller Supervisors group queue in the list.

The name in the **Id** column is a link that causes the work item list for that work queue to be displayed. For information about work item lists, see Work Item Lists on page 30.

- **Queue Description** - A description that was entered when the user or group was added to the system.
- **User or Group queue** - The type of work queue:
  - **User** - a personal work queue that will contain work items that were sent directly to that user.
  - **Group** - a work queue that is accessible to all users who are members of that group. Any user who is a member of the group can work on the work items that appear in the group work queue.
- **Test or Production queue** - Whether a work item is sent to a test or production work queue is determined by the status of the TIBCO process, as follows:
  - **Test** - Work items that result from cases of processes with a status of **Unreleased** (a new process being tested for release) or **Model** (a process that has been imported) are sent to the **test work queue** for the user / group.
  - **Production** - Work items that result from processes with a status of **Released** are sent to the **released work queue** for the user / group.

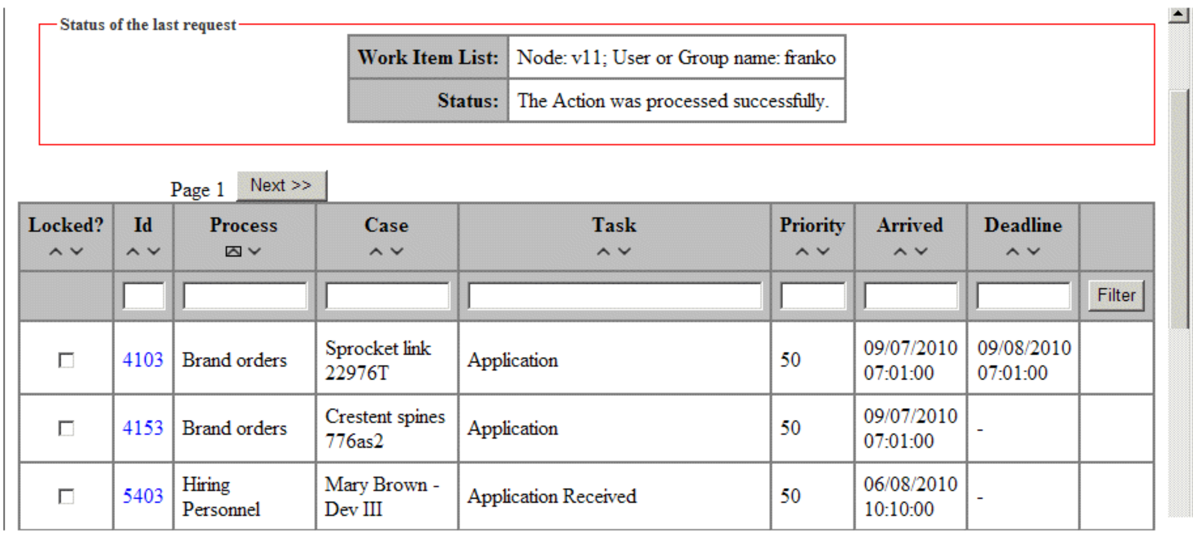
  Typically, you will be working with released work queues. Test work queues are normally only used in a testing environment before the process is used in a live production environment.
- **Deadlined** - The number of work items in the work queue that have an expired deadline.
- **Unopened** - The number of work items in the work queue that have not been opened since they arrived in the work queue.
- **Urgent** - The number of work items in the work queue that are flagged as "urgent" (they have a priority higher than a value specified by the system administrator, which defaults to 10).
- **Total** - The total number of work items in the work queue.
- **Atom Feed** - The link in this column allows you to set up an atom feed (also known as an RSS feed) for the desired work queue. For more information, see Atom/RSS Feeds on page 14.

Work Item Lists

A work item list is a list of all work items in the selected work queue.

Note that a “work queue” and “work item list” are synonymous. That is, when you click on a specific work queue in the work queue list (see Work Queue Lists on page 28), a list of the work items in that work queue is displayed. For example:

Figure 18 Example Work Item List



The **Work Item List** field in the box above the work item list shows you the server (also called a "node") to which you are connected, as well as the name of the work queue (which is the name of the user or group whose work queue you are viewing).

The **Status** field will inform you if there was a problem displaying the work item list.

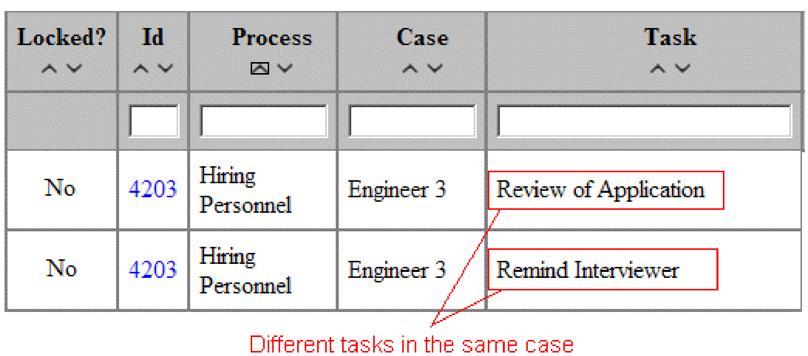
The blank fields below each of the column headers are used to *filter* the list. This allows you to display only the work items you are interested in. For more information, see Filtering the Work Item List on page 33.

The “up” and “down” arrow buttons directly below the column headers are used to sort the information in the work item list. For more information, see Sorting the Work Item List on page 37.

The work item list contains the information listed in the table below:

Table 2 Work Item List Columns

<table>
<tr><th>Column</th><th>Description</th><th>Data Type</th></tr>
<tr><td>Locked</td><td>If the box in this column is checked, the work item is currently locked (opened). You cannot open a work item that is already open by another user unless you are an administrator. For more information, see Opening an Already Locked Work Item on page 39.</td><td>n/a</td></tr>
<tr><td>Id</td><td>This is the "case number", which identifies the case that the work item is a part of. Note that there can be two or more work items that have the same case number, for example, if the process has parallel paths that result in multiple work items. Therefore, this number should be used in conjunction with the name of the task in the Task column to uniquely identify the work item:


<table>
<tr><th>Locked?</th><th>Id</th><th>Process</th><th>Case</th><th>Task</th></tr>
<tr><td>No</td><td>4203</td><td>Hiring Personnel</td><td>Engineer 3</td><td>Review of Application</td></tr>
<tr><td>No</td><td>4203</td><td>Hiring Personnel</td><td>Engineer 3</td><td>Remind Interviewer</td></tr>
</table>

This identifier is a link that opens the work item so that it can be processed. For information about processing work items, see Processing Work Items on page 39.</td><td>Numeric</td></tr>
<tr><td>Process</td><td>The description of the process from which this work item was generated. This is the description that was entered when the process was defined.

If a description was not specified when the process was defined, the name of the process is shown in this column instead. Note that if a process description was not specified, sorting or filtering on the Process or Task columns will produce unexpected results.</td><td>Text</td></tr>
</table>

Table 2 Work Item List Columns

Column	Description	Data Type
Case	The description that was entered when the case that generated this work item was started.	Text
Task	A description of the user task in the process that this work item is associated with. This description typically describes the type of action that is taking place at this task in the process.	Text
Priority	A value that indicates the relative importance of the work item. This is specified when the user task is defined in the process.	Numeric
Arrived	The date and time the work item arrived in the work queue. The order of the month and day (DD/MM/YYYY or MM/DD/YYYY) depends on a setting on the iProcess Engine to which you are logged in.	DateTime
Deadline	The date and time that the work item's deadline expires. When a task is defined in a process, a deadline may be specified on that task to ensure that the work item associated with the task is completed within a specified period of time. For example, the task may specify that the work item must be completed within 3 days, otherwise a notification is sent to a manager. If the work item has a deadline, and the work item is not released before the deadline date/time, the work item is removed from the work queue, and another work item is generated, as defined in the process — typically, the generated work item is for the purpose of informing someone that the work item was not processed within the deadline period. If the work item does not have a deadline specified, this column will contain a hyphen instead of a date and time. The order of the month and day (DD/MM/YYYY or MM/DD/YYYY) depends on a setting on the iProcess Engine to which you are logged in.	DateTime

Displaying Additional Pages of Work Items

A "page" of work items is displayed in the work item list. By default, a page includes 20 work items, although that number can be modified by a system administrator.

To display an additional page, click on the **Next >>** button that is displayed in both the upper and lower left part of the work item list table. If you click on the **Next >>** button, a **<<Previous** button is then displayed so you can also navigate back to the previous page.

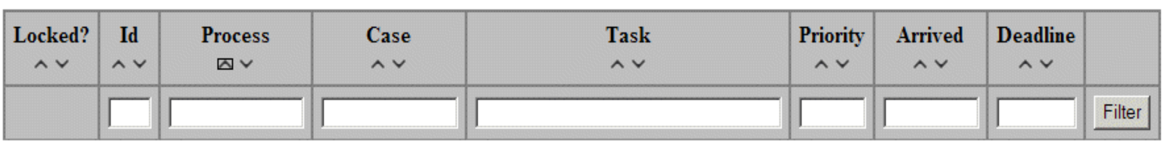
You can page through as many pages as are available in the list.

Filtering the Work Item List

Filtering a list of work items involves entering filter criteria so that only some of the work items are shown in the list, rather than all of them. Filtering a list of work items allows you to display only the work items you are interested in. For example, you may only be interested in work items that arrived in the work queue after Jan. 1, 2009. You can filter the list so that only those work items are shown.

The blank fields below the column headers on the work item list are used to enter filter criteria.

Figure 19 Work Item List Filter Fields



To filter the work item list, enter filter criteria in the desired filter field, then click the **Filter** button.

Entering filter criteria involves three possible elements:

- operator
- wild card characters
- filter value

These are described in the subsections below.

If a process description was not specified when the process was defined, the name of the process is shown in the **Process** column. Note that if a process description was not specified, filtering on the **Process** or **Task** columns will produce unexpected results.

Operator

The operator specifies that you either want to display the work items the are *equal to*, *less than*, or *greater than* the specified filter value. The valid operators are:

Table 3 Filter Operators

Operator	Description
=	Equals
<	Less than
>	Greater than

For example, to specify that you want all work items listed that arrived in the work queue before April 15, 2009, enter the following in the **Arrived** column filter field, then click **Filter**:

```
< 15/04/2009
```

Note, however, that operators are needed *only* for numeric (Id and Priority) and DateTime (Arrived and Deadline) fields. Do *not* use an operator when filtering on any of the text fields (Process, Case, and Task) — text fields always assume equals (=). For example, to display the work items that have a task name of "Review", simply enter the following in the **Task** column filter field, then click **Filter**:

```
Review
```

Wild Card Characters

You can use the * (asterisk) wild character when filtering on any of the text fields; it cannot be used in numeric nor DateTime fields.

When used in a text string, the * wild card character matches zero or more of any character. For example:

- To list only the work items that have a process name beginning with "A", enter the following in the **Process** column filter field, then click **Filter**.

  ```
  A*
  ```

- To list only the work items that have a case description that contains "AQ229", enter the following in the **Case** column filter field, then click **Filter**.

  ```
  *AQ229*
  ```

Filter Value

The filter value is the text, number, or date/time you specify for the filter match — only work items that match this value (based on the operator) are displayed in the work item list.

The characters and format of the value you enter depends on the type of data in the column on which you are filtering, as follows:

Table 4   Filter Value Data Types

Data Type	Description
Text	Consists of any number of letters, numbers, or special characters (e.g., #, $, etc.). When entering text values, do *not* enclose the value in quotes. Case is not significant when entering a text filter value. Text fields: Process, Case, and Task
Numeric	Consists of one or more of the numbers 0-9. Numeric field: Id, Priority Note - Although Priority is a numeric value, because of an issue in earlier iProcess Engines, you may have to treat it as a string when filtering the Priority column, and you are using either the '<' or '>' operator. If your iProcess Engine has MR 36914, 38293, or 3826 implemented, enter a numeric value when using '<' or '>' (e.g., > 50); if your iProcess Engine does *not* have any of these MRs implemented, enter a string value when using '<' or '>' (e.g., > "50"). (This is an exception to the rule of not enclosing text values in quotes when filtering.)
DateTime	Consists of both the date and time, separated by a space. The format of the date (MM/DD/YYYY or DD/MM/YYYY) depends on the setting on the iProcess Engine to which you are connected. DateTime fields: Arrived and Deadline

Examples

The following show some examples of filter criteria for the work item list:

- To display only the work item(s) with a case number of 152, enter the following in the **Id** column filter field, then click **Filter**:

  `= 152`

- To display only the work items whose case description begins with "Carriage", enter the following in the **Case** column filter field, then click **Filter**:

  `Carriage*`

  Remember - Text fields do not need operators — they always assume equals (=).

- To display only the work items that have a priority equal to 1, enter the following in the **Priority** column filter field, then click **Filter**:

  `= 1`

- To display only the work items that have a deadline date earlier than June, 1, 2009, enter the following in the **Deadline** column filter field, then click **Filter**:

  `< 06/01/2009`

Filtering on Multiple Columns

You can filter on multiple columns at one time. This causes a logical "AND" of your multiple filter values. Only the work items that satisfy *all* of the filter values that you specify are displayed in the work item list.

For example, if you enter the following filter criteria:

- Priority field: `>10`
- Arrived field: `= 01/01/2009`

The work item list will contain only the work items that have a priority greater than 10 *and* that arrived in the work queue on Jan. 1, 2009.

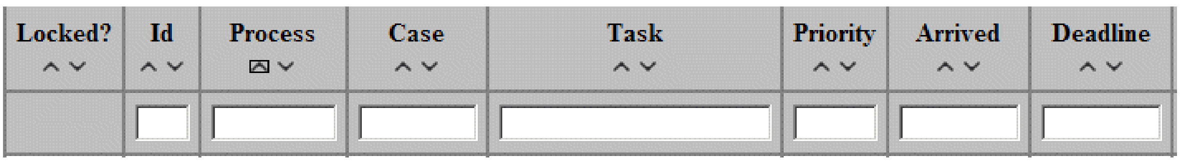
Sorting the Work Item List

The iProcess Workspace Lite application allows you to sort the information in the columns of the work item list so they are in the order you would like them listed.

For example, you may want all work items displayed chronologically by their arrival date, with those that arrived in the work queue first to be displayed first.

Sorting the work item list is accomplished by simply clicking on either the "up" or "down" arrow button beneath the desired column header:

Figure 20 Sort Buttons on the Work Item List



— Clicking on the up arrow causes the list to be sorted in **ascending** order on the information in that column.

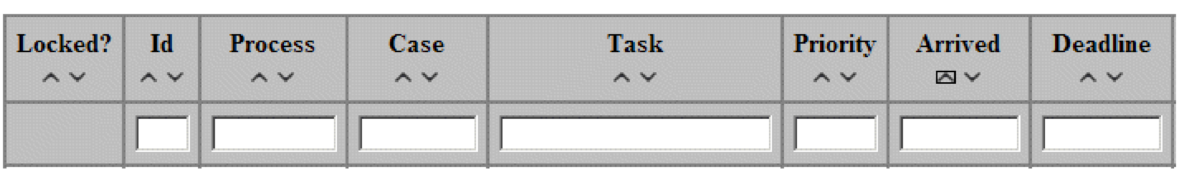
— Clicking on the down arrow causes the list to be sorted in **descending** order on the information in that column.

For example, to sort the list by arrival date in ascending order (i.e., from oldest to most recent), click on the up arrow in the **Arrived** column.

If a process description was not specified when the process was defined, the name of the process is shown in the **Process** column. Note that if a process description was not specified, sorting on the **Process** or **Task** columns will produce unexpected results.

Note that the current sort order is always shown as an outline around the arrow on which the list is being sorted. For example, if you sort the work item list on the arrival date, in ascending order, the column headers will appear as follows:

Figure 21 Current Sort Indicator



If you sort on text data (process description, case description, etc.), upper-case values are shown before lower-case values when sorting in ascending order. For example, the following are names that are sorted in ascending order:

- Accounts
- Book
- Connection
- ally
- broker

Processing Work Items

A work item represents a task in a case (see the illustration of a process on page 4). Typically, a work item has an electronic form associated with it that must be **opened** and filled out (some forms may only display information and will not have fields to fill out). You can then **close** the work item in your work queue so that it can be opened again and completed at a later time. When the form is completed, the work item is **submitted** so that the case can progress, possibly resulting in another work item that represents the next task in the case.

Opening a Work Item

Opening a work item causes the form associated with the work item to be displayed.

To open a work item, display the work item list, then click on the link in the **Id** field for the work item you want to open. The work item form is displayed.

From the work item form, you can cancel out of the form without saving any changes by clicking on the **Cancel** button. Or, you can “close“ or “submit” the work item (see Closing a Work Item on page 43 or Submitting a Work Item on page 47, respectively).

Opening an Already Locked Work Item

Before opening a work item (especially from a group work queue where other users are viewing the same work items as you), refresh the list so that you can see which ones are currently locked (to refresh the list, from Microsoft Internet Explorer, press **F5**; from Mozilla Firefox, press **<Ctrl>R**).

If a work item is already locked, the **Locked** column contains "Yes":

Figure 22 Locked Work Item

Locked?	Id	Process	Case
Yes	52	Timeoff request	Jason Dean 3-31-09
No	102	Brand orders	Lipid grease AS77

Also note that the number shown in the **Id** column is no longer a link when the work item is open (unless you are an administrator or the user who opened the work item). This prevents users from opening work items that are already open by another user.

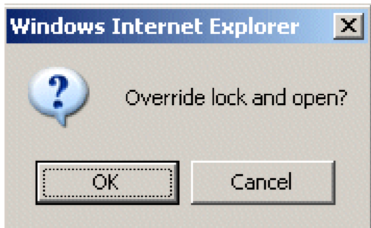
Note, however, the iProcess Workspace Lite application will allow an administrator, or the user who opened the work item, to open a work item that is already locked. This would typically only be done if the work item was unintentionally left open. It allows you to gain the lock, then either save or cancel the form. The number in the **Id** column remains a link for administrators and the user who opened the work item:

Figure 23 Selecting a Locked Work Item

Locked?	Id	Process	Case
Yes	52	Timeoff request	Jason Dean 3-31-09

If an administrator clicks on the link, the following dialog is displayed (if the user who originally opened the work item clicks the link, the work item directly opens):

Figure 24 Override Lock Dialog



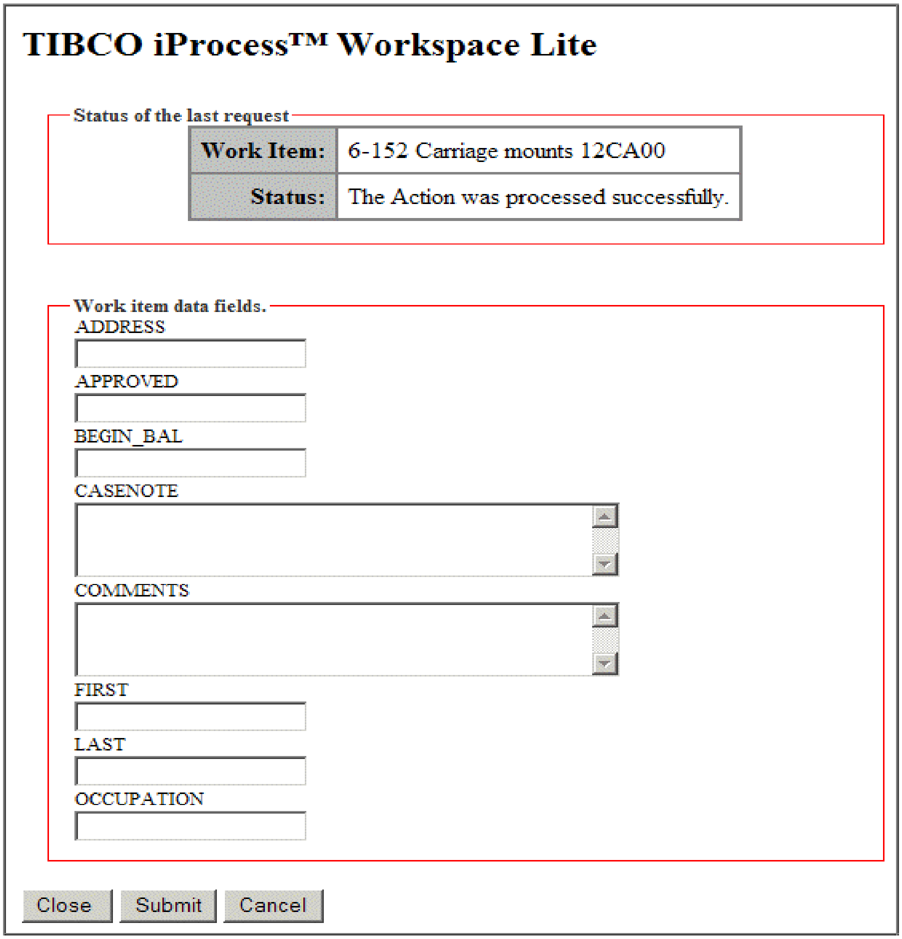
Clicking **OK** on the override lock dialog causes you to gain the lock on the work item. If the user who had the work item locked attempts to save and close the work item (by clicking on either the **Close** or **Submit** button), they will be told that they don't have it locked anymore — all they can do is cancel the form.

Filling in a Work Item Form

The form that appears when you open a work item is specific to your company. Each company that uses the iProcess Workspace Lite application will create their own forms that relate to the specific business they are in.

Your company will instruct you in properly filling out the forms that they have designed for the iProcess Workspace Lite application. The following is an example of what a form may look like.

Figure 25 Example Work Item Form



The **Work Item** field near the top of the form tells you the case number[1], as well as the case description that was entered when the case was started. The **Status** field will inform you if there was a problem displaying the work item form.

The fields that contain a box to the right of the field name allow you to enter information. The fields without a box are for information only.

You can use the **Tab** key to move from field to field on the form. Dates and times must be entered in the format shown next to the field name.

1. The number to the right of the hyphen ("152" in the example above) is the case number.

Closing a Work Item

Closing a work item causes any information you have entered in the form to be saved, then the work item is closed (and unlocked) and placed back in the work queue. The work item is then available to be opened and completed at a later time.

To close a work item, click on the **Close** button on the work item form.

Forwarding Work Items

You can forward work items that appear in your work item list to another user or group. This removes the work items from your work item list and adds them to the work item list of the user/group to whom you have forwarded them.

Note that not all work items are forwardable. Whether or not a work item can be forwarded is based on a number of factors, such as permissions and whether a "forwardable" flag is set in the process definition.

There are two methods of forwarding work items:

- **From the work item list** - This method allows you to select multiple work items and forward them all at once. You can only select the work items that are forwardable.

  For more information, see Forwarding Work Items from the Work Item List on page 43.

- **From the work item form** - This method allows you to forward the individual work item by clicking the **Forward** button on the work item form. The **Forward** appears on the form only if the work item is forwardable.

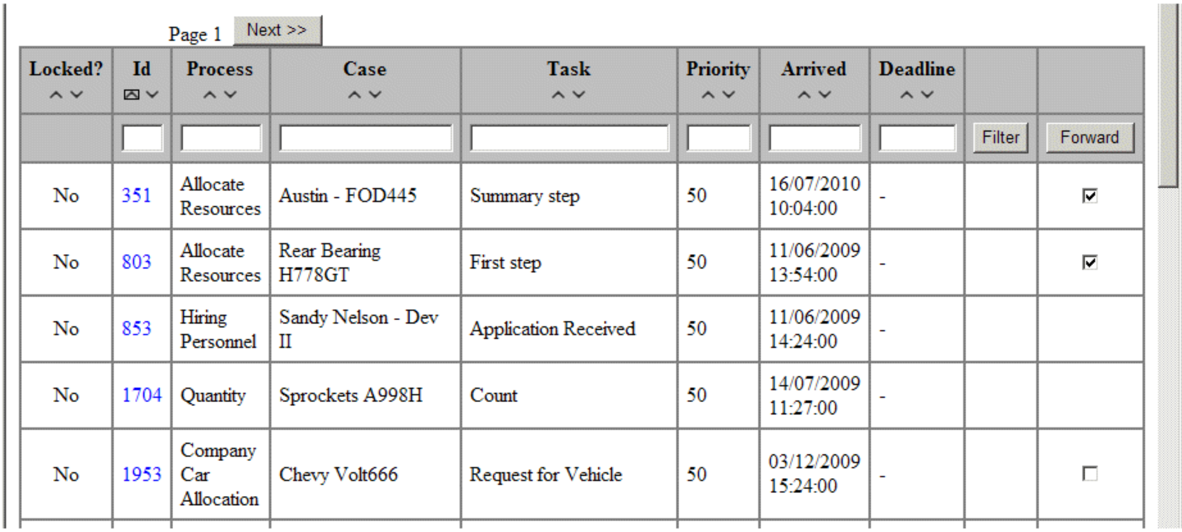
  For more information, see Forwarding Work Items from the Work Item Form on page 46.

Forwarding Work Items from the Work Item List

To forward work items from the work item list:

1. On the work item list from which the work items are being forwarded, check the boxes in the column with the **Forward** button for the work items you would like to forward:

Figure 26 Forwarding Work Items from the Work Item List



Page 1 Next >>

Locked?	Id	Process	Case	Task	Priority	Arrived	Deadline	Filter	Forward
No	351	Allocate Resources	Austin - FOD445	Summary step	50	16/07/2010 10:04:00	-		☑
No	803	Allocate Resources	Rear Bearing H778GT	First step	50	11/06/2009 13:54:00	-		☑
No	853	Hiring Personnel	Sandy Nelson - Dev II	Application Received	50	11/06/2009 14:24:00	-		
No	1704	Quantity	Sprockets A998H	Count	50	14/07/2009 11:27:00	-		
No	1953	Company Car Allocation	Chevy Volt666	Request for Vehicle	50	03/12/2009 15:24:00	-		☐

Note that only work items that *can* be forwarded (correct permissions, "forwardable" flag in the process definition is set, etc.) contain the check box in the **Forward** column.

Also note that if the work item is currently locked (open), a check box will not appear in the **Forward** column, even if the work item is forwardable.

2. Click the **Forward** button in the column header.

   The following dialog is displayed:

Figure 27 Work Queues to Forward to Dialog

Status of the last request

Work Queues to Forward To:	Candidate Work Queues for Forwarding
Status:	The Action was processed successfully.

	Id	Queue Description	User or Group queue	Test or Production queue	
1	bobby	Bobby Miller	User	Production	Forward
2	franko	Frank Olin	User	Production	Forward
3	Teller Supervisors	Teller Supervisors	Group	Production	Forward
4	Tellers	Tellers	Group	Production	Forward

This dialog lists the work queues to which you are allowed to forward the selected work items.

3. Click the **Forward** link in the far-right column for the work queue to which you want to forward the work items.

   A dialog similar to the following is displayed:

Figure 28 Forward Work Item Confirmation

Status of the last request

Status:	The Action was processed successfully.

Work Item(s):	v11|ALLOCATE|swadmin|R|351|7857|v11|SUMMARY|0|2,v11|ALLOCATE|swadmin|R|803|1203|v11|STEP1|0|2
Work Queue:	swadmin
Destination Work Queue:	franko

View All Work Queues

This confirms the forward operation. The **Work Item(s)** field provides information about the work items that were forwarded, the **Work Queue** field indicates the work queue they were forwarded from, and the **Destination Work Queue** indicates the work queue to which they were forwarded.

4. Click on the **View All Work Queues** link to return to the work queue list.

The Session Activity log also shows you information about work items that were forwarded. See User Session Activity on page 13.

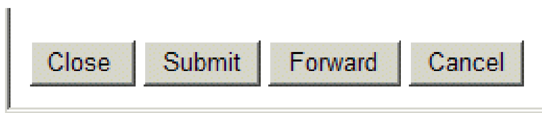
Forwarding Work Items from the Work Item Form

To forward work items from the work item form:

1. Open the work item that you want to forward.

   If the work item is *forwardable*, the form will contain a **Forward** button:

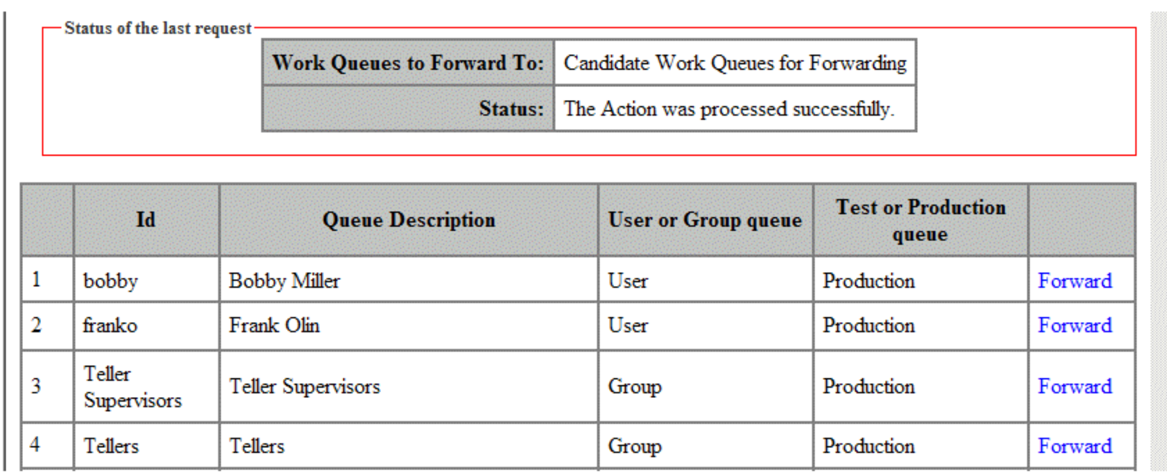
Figure 29 Forward Button on Work Item Form



2. Click the **Forward** button.

   A dialog similar to the following is displayed:

Figure 30 Work Queues to Forward to Dialog


Status of the last request

Work Queues to Forward To:	Candidate Work Queues for Forwarding
Status:	The Action was processed successfully.

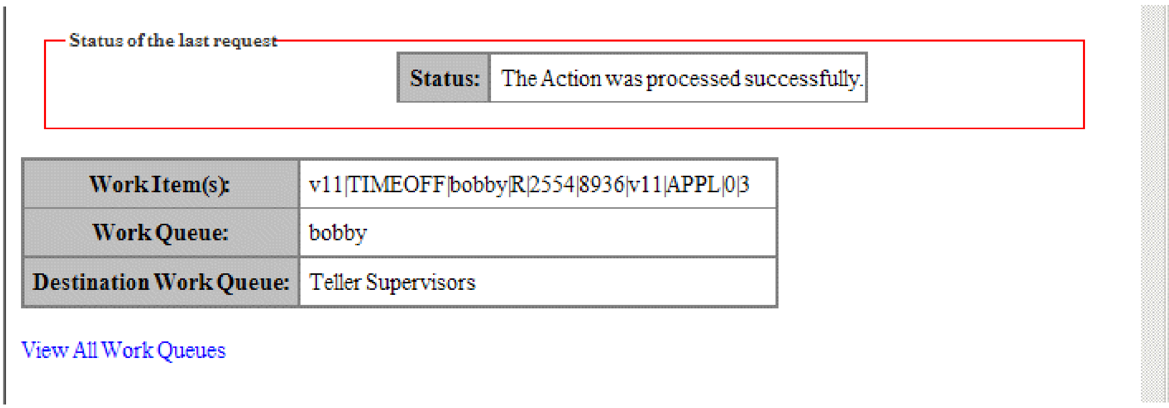
	Id	Queue Description	User or Group queue	Test or Production queue	
1	bobby	Bobby Miller	User	Production	Forward
2	franko	Frank Olin	User	Production	Forward
3	Teller Supervisors	Teller Supervisors	Group	Production	Forward
4	Tellers	Tellers	Group	Production	Forward

This dialog lists the work queues to which you are allowed to forward the open work item.

3. Click the **Forward** link in the far-right column for the work queue to which you want to forward the work item.

   A dialog similar to the following is displayed:

Figure 31 Forward Work Item Confirmation



   This confirms the forward operation. The **Work Item** field provides information about the work item that was forwarded, the **Work Queue** field indicates the work queue it was forwarded from, and the **Destination Work Queue** indicates the work queue to which it was forwarded.

4. Click on the **View All Work Queues** link to return to the work queue list.

The Session Activity log also shows you information about work items that were forwarded. See User Session Activity on page 13.

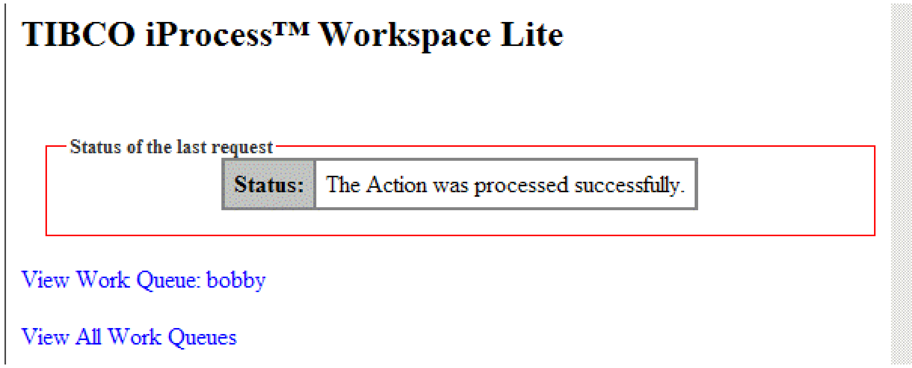
Submitting a Work Item

Submitting a work item means that you are done with that work item. If there are any fields on the form associated with the work item that are marked as "required" in the form definition, they must be filled in before the system will allow you to submit the work item.

Submitting the work item causes any information you've entered to be saved, then the work item is closed (and unlocked) and it is removed from the work queue. The case advances to the next task in the process, possibly resulting in another work item appearing in someone's work queue.

To submit a work item, click the **Submit** button on the work item form. If the work item is submitted successfully, a screen similar to the following is displayed:

Figure 32 Successfully Submitted Work Item



From this screen you can return to the work queue you were previous on by clicking on the **View Work Queue** link, or to the work queue list by clicking on the **View All Work Queues** link.

Chapter 4 Processes and Cases

This chapter provides information about how to view and work with processes and cases.

Topics

Process Lists

A process list displays a list of all of the processes to which you have access. From the process list, you can start cases of a process, or view information about existing cases of processes.

To display the process list, click on the **Processes** navigation link in iProcess Workspace Lite. A screen similar to the following is displayed (note that your screen may appear different, depending on the skin you are using, and any appearance customization that was implemented on your system).

Figure 33 Example Process List

Status of the last request

Process List:	All processes available in the system
Status:	The Action was processed successfully.

Show Cases	Start Case	Name	Process	Version	Released
Show cases of CARPOOL	Start case of CARPOOL	CARPOOL	Company Car Allocation	1.0	Released
Show cases of HIRING	Start case of HIRING	HIRING	Hiring Personnel	1.0	Released
Show cases of ALLOCATE	Start case of ALLOCATE	ALLOCATE	Allocate Resources	0.5	Released

The **Status** field in the box above the process list will inform you if there was a problem displaying the process list.

The process list contains the following information:

- **Show Cases** - This column provides a link that displays the case list for the named process. For information about case lists, see Case Lists on page 54.
- **Start Case** - This column provides a link that allows you to start a case of the named process. For information about starting a case, see Starting a Case of a Process on page 51.
- **Name** - The name of the process.

- **Process** - A description for the process that was entered when the process was defined.
- **Version** - The version number of the process.
- **Released** - The current status of the process. The possible statuses are:
  - **Released** - A process with this status can be used in live production. Cases can be started, with work items being sent to user/group work queues, etc.

    You will typically be dealing with this status of process.
  - **Unreleased** - New processes default to a status of Unreleased. Work items from cases of processes with a status of Unreleased go to a "test" work queue for the user or group who is the addressee of the step (for more information about test work queues, see the **Test or Production queue** column in the work queue list — see page 29). This allows the new process to be tested/evaluated prior to releasing it.
  - **Model** - This is the status a Released process has after being imported (which is something a system administrator would do). This status allows new versions of a process to be imported without overwriting an existing Released or Unreleased version. Work items from cases of processes with a status of Model go to a "test" work queue for the user or group who is the addressee of the step. This allows the new version to be tested/evaluated prior to adopting it on the target system.
  - **Withdrawn** - Processes with this status are no longer used in a production environment. Cases cannot be started against a withdrawn process.

Starting a Case of a Process

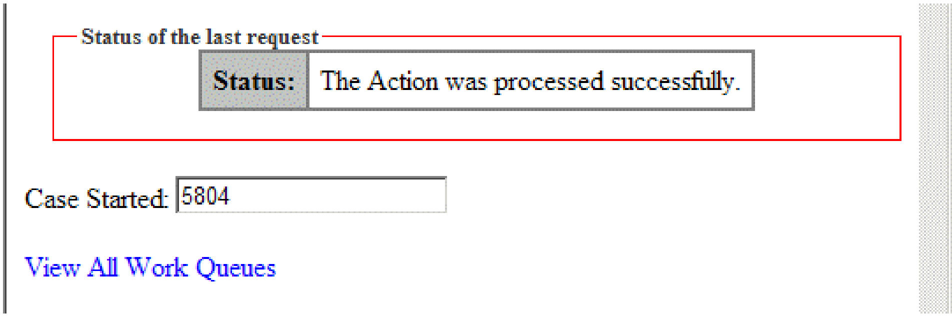
Starting a case of a process essentially means you are starting a new *instance* of a business process. For example, if you were to start a case of the example business process shown in the *Introduction* chapter on page 4, it would cause a work item for the "Help Request" task to appear in one or more user's work queues (that's because the "Help Request" task is the first task in the process). When a user completes the form for the "Help Request" task, the case will progress to the next task in the process, and so on, until the case is complete.

To start a case of a process:

1. Display the process list, then click on the link in the **Start Case** column for the desired process.

   The dialog that is displayed next depends on how the process was defined:
   - The case may be directly started when you click the link in the **Start Case** column, causing a confirmation screen to be displayed, as follows:

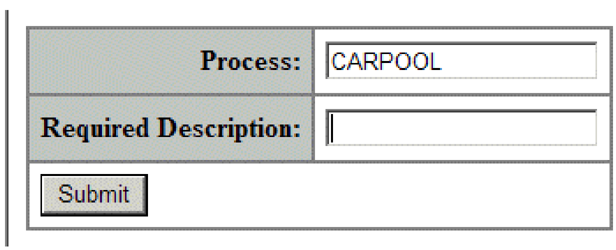
Figure 34 Case Directly Started



If this confirmation screen is displayed, you have completed starting the case — you can use the **View All Work Queues** link to return to the work queue list, or use the links on the top of the screen to proceed to other areas of the application.

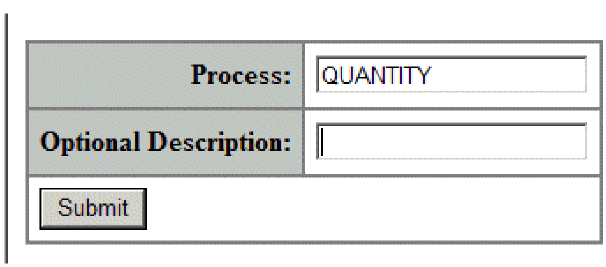
— If the process definition calls for either a required or optional description for the case, one of the following two dialogs is displayed:

Figure 35 Case Start with Required Description



or

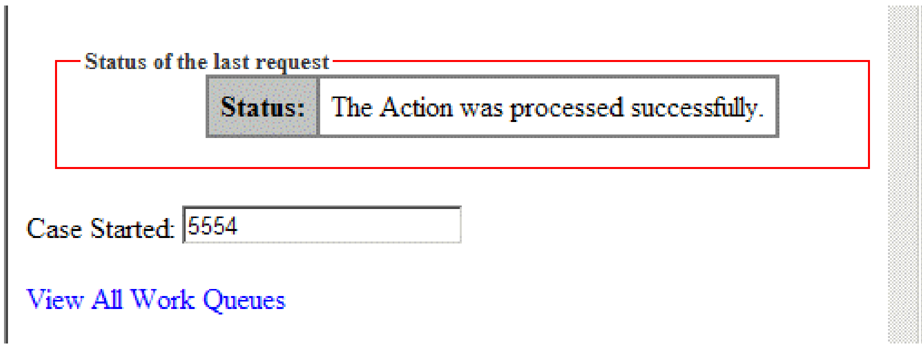
Figure 36 Case Start Dialog with Optional Description



The **Process** field will be prefilled with the name of the process that you are starting a case of.

2. If a description is required, enter a description in the **Description** field; if it is optional, you can choose to enter one or not.
3. Click the **Submit** button. A screen similar to the following is displayed:

Figure 37 Case Started Confirmation Dialog



The **Status** field will inform you if there was a problem with starting the case.

The **Case Started** field shows you the "case number" that was assigned when the case was started. This is a unique number that allows you to identify the case. Case numbers are shown in the **Id** column of the case list (see Case Lists on page 54).

4. Click on the **View All Work Queues** to return to the work queue list, or use the links in the main header bar to navigate to the desired location in the application (process list, work queue list, etc.).

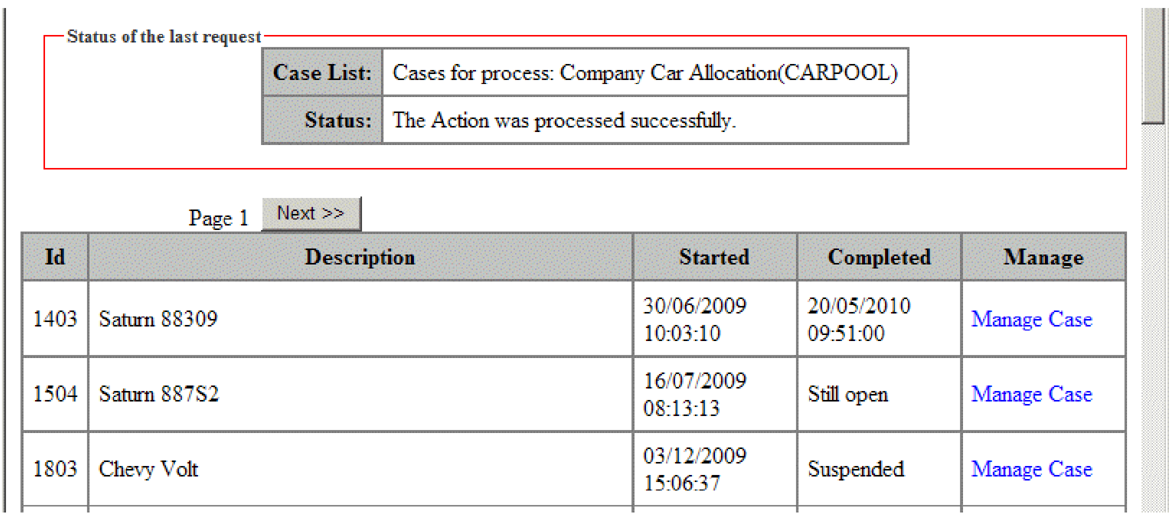
Case Lists

A case list displays cases of a particular process.

Once a case of a process is started, a record of that case remains in the system until the case is *purged*, which permanently deletes the case from the system. For information about purging cases, see Purging a Case on page 65.

To view a case list, display the process list, then click on the link in the **Show Cases** column for the desired process. A screen similar to the following is displayed:

Figure 38 Example Case List



The **Case List** field in the box above the case list tells you the process whose cases are being listed. The **Status** field will inform you if there was a problem displaying the case list.

The case list contains the following information:

- **Id** - This is the case number that was generated when the case was started. It is a unique number that allows you to positively identify the case.
- **Description** - The description that was entered when the case was started (note that entering a description upon case start is optional).
- **Started** - The date and time the case was started.

- **Completed** - If the case is complete, this column displays the date and time the case was completed. If the case is not yet complete, "Still open" is shown in this column.
- **Manage** - This column contains a **Manage Case** link that, when clicked, displays a dialog that allows you to perform functions such as displaying an audit trail for the case, displaying a list of outstanding work items for the case, closing the case, etc.

  For information about using the functions available from the **Manage Case** dialog, see Managing Cases on page 56.

Displaying Additional Pages of Cases

A "page" of Cases is displayed in the case list. By default, a page includes 20 cases, although that number can be modified by a system administrator.

To display an additional page, click on the **Next >>** button that is displayed in both the upper and lower left part of the case list table. If you click on **Next >>**, a **<<Previous** button is then displayed so you can also navigate back to the previous page.

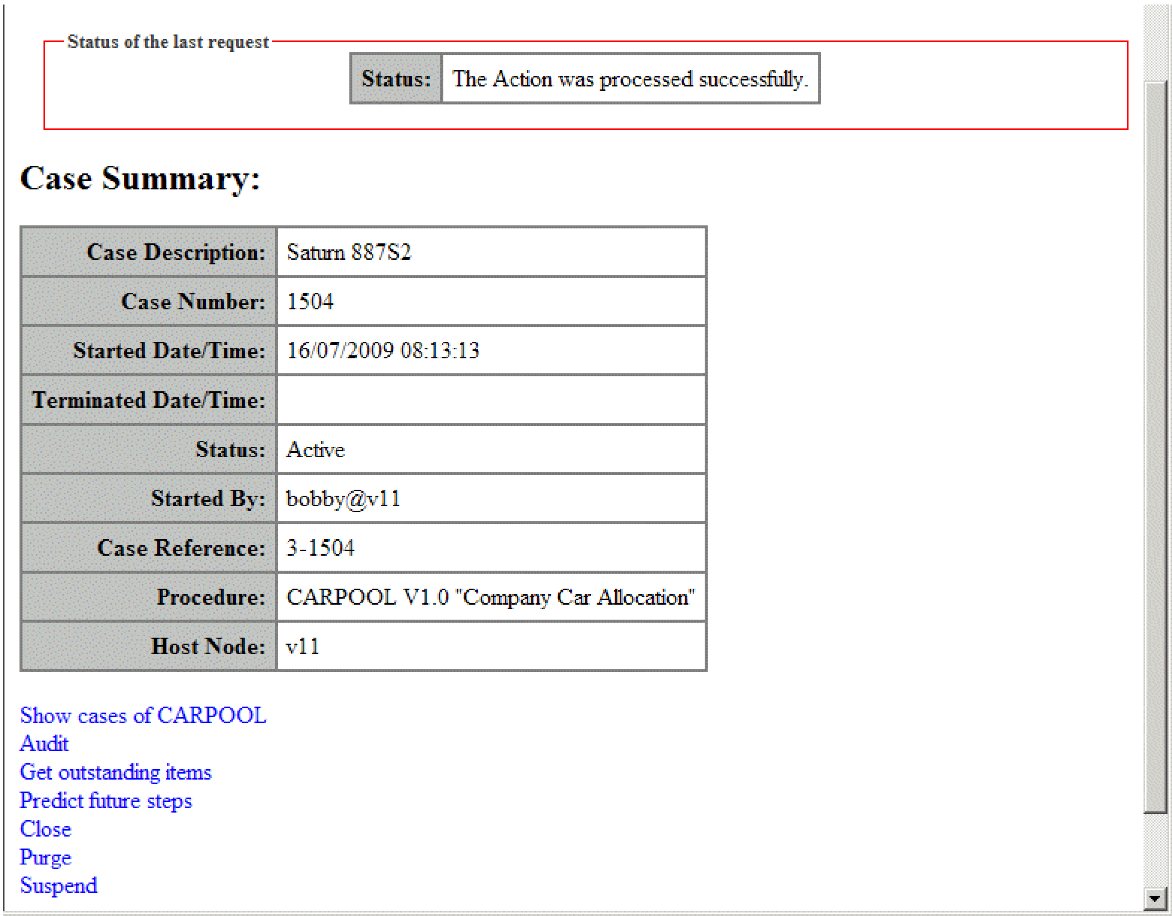
You can page through as many pages as are available in the list.

Note that if you continue to click the **Next >>** button, you will eventually reach the end of the available cases.

> The total number of cases that can appear in a case list at one time is limited so that system performance is not adversely affected if a process has a very large number of cases. The maximum number of cases in the case list defaults to 500, but this number can be modified by the system administrator.

Managing Cases

The case list contains a **Manage** column that has a **Manage Case** link for each case listed. Clicking on the **Manage Case** link causes a dialog similar to the following to be displayed:



This dialog provides a summary of the case, plus a number of links in the lower part of the dialog that allows you to perform various functions on the case. Note that the specific functions that are available depends on the current state of the case (for example, the **Close** link appears only for cases that are still open), as well as the logged-in user's authority level (for example, the **Purge** link appears only if the logged-in user has system administrator authority).

The following are the possible function links available from the **Manage Case** dialog:

- **Show cases of** *ProcessName* - This re-displays the case list. This link always appears.
- **Audit** - This displays the audit trail for the case. This link always appears.

  For more information, see Viewing a Case Audit Trail on page 57.
- **Get Outstanding items** - This displays a list of the work items in the case that are outstanding. This link appears only if there are outstanding work items in the case.

  For more information, see Viewing the Outstanding Work Items for the Case on page 59.
- **Predict future steps** - This displays information about the predicted outcome of the case. This link appears only if the case has been enabled for prediction. (

  For more information, see Predicting the Future Outcome of the Case on page 62.
- **Close** - This closes the case. This link appears only if the case is still active, and the user has system administrator authority.

  For more information, see Closing a Case on page 64.
- **Purge** - This purges (permanently deletes) the case from the system. This link appears only if the user has system administrator authority.

  For more information, see Purging a Case on page 65.
- **Suspend** - This suspends the case, which stops the process flow at its current location. This link appears only if the case is still active.

  For more information, see Suspending a Case on page 66.
- **Activate** - Re-activates a currently suspended case. This link appears only if the case is currently suspended.

  For more information, see Activating a Suspended Case on page 67.

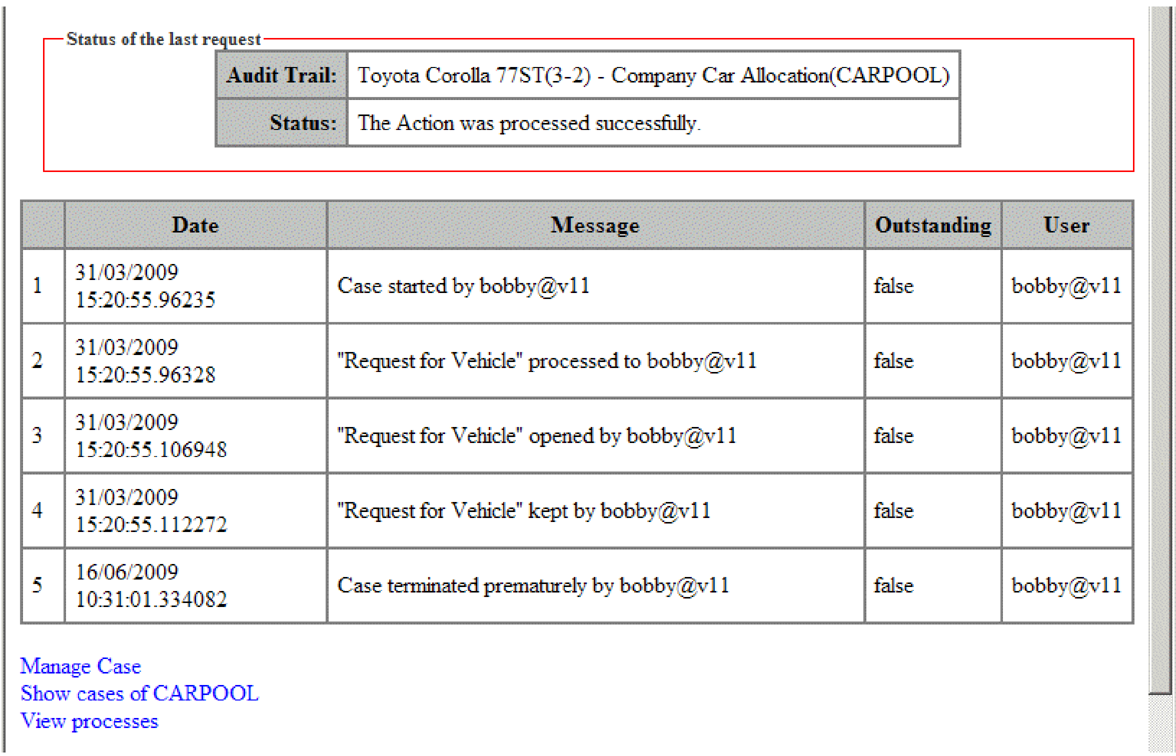
Viewing a Case Audit Trail

Viewing a case audit trail allows you to see the case's chronological progress through the process, that is, it shows you which tasks (work items) have been processed and who processed them. It also shows you every action that has taken place in the case, for example redirecting a work item in the case, suspending the case, etc.

To view the audit trail for a case:

1. Display the case list.
2. Click on the **Manage Case** link in the **Manage** column for the case whose audit trail you want to view.
3. Below the Case Summary for the case, click the **Audit** link. A screen similar to the following is displayed:

Figure 39 Example Case Audit Trail



Status of the last request

Audit Trail:	Toyota Corolla 77ST(3-2) - Company Car Allocation(CARPOOL)
Status:	The Action was processed successfully.

	Date	Message	Outstanding	User
1	31/03/2009 15:20:55.96235	Case started by bobby@v11	false	bobby@v11
2	31/03/2009 15:20:55.96328	"Request for Vehicle" processed to bobby@v11	false	bobby@v11
3	31/03/2009 15:20:55.106948	"Request for Vehicle" opened by bobby@v11	false	bobby@v11
4	31/03/2009 15:20:55.112272	"Request for Vehicle" kept by bobby@v11	false	bobby@v11
5	16/06/2009 10:31:01.334082	Case terminated prematurely by bobby@v11	false	bobby@v11

Manage Case
Show cases of CARPOOL
View processes

The **Audit Trail** field in the box above the audit trail table shows you the case description and case number of the case whose audit trail you are viewing, as well as the name of the process that the case is an instance of. The **Status** field will inform you if there was a problem displaying the audit trail.

The audit trail contains the following information:

- **Date** - The date and time the action occurred.
- **Message** - This describes what action took place, and who initiated it, if applicable (some actions are initiated by the system (for example, "Case terminated normally").

Note that the term "processed to" in the audit message means that the work item was "sent to" the indicated user's work queue. Also, user names shown in the message are in the form *username@servername*, where *servername* is the server the user was logged into when performing the action.

The terms "kept by" and "released by" means the work item was "closed by" and "submitted by", respectively (using the **Close** and **Submit** buttons on the work item form).

- **Outstanding** - If a task is "outstanding" it means the process flow is sitting at that task. The **Outstanding** column contains "true" if the task is outstanding, or "false" if the task is not outstanding. Note that processes can have parallel branches, resulting in more than one outstanding work item at one time.

  For information about viewing the list of outstanding work items for a case, see Viewing the Outstanding Work Items for the Case on page 59.

- **User** - The name of the user who initiated the action. This is in the form *username@servername*, where *servername* is the server the user was logged into when performing the action.

From the audit trail screen, you can also display other screens by using the links provided in the lower-left part of the screen, as follows:

— **Manage Case** - Returns you to the **Manage Case** dialog.

— **Show cases of** *ProcessName* - Redisplays the case list.

— **View processes** - Returns you to the process list.

Viewing the Outstanding Work Items for the Case

"Outstanding work items" represent the steps at which the process flow is currently sitting.

"Normal" steps that are outstanding result in a work item appearing in one or more work queues. Other step types (event steps, sub-procedure call steps, etc.) result in some other action, such as an external program being triggered, a sub-procedure starting, etc. These step types do not result in a work item appearing in a work queue, although they are still considered "outstanding" because the process flow has halted at that step until whatever action was started by that step is complete.

Often, there are multiple outstanding items in a case because the process flow can take multiple paths, depending on how the procedure is defined.

An administrator may have a need to know which items are currently outstanding in a case, possibly to determine how the case is progressing.

To view a list of the current outstanding items in a case:

1. Display the case list.
2. Click on the **Manage Case** link in the **Manage** column for the case whose audit trail you want to view.
3. Below the Case Summary for the case, click the **Get outstanding items** link. A screen similar to the following is displayed

Figure 40 Example List of Outstanding Work Items

Status of the last request

Outstanding Steps:	Carriage mounts 12CA00 (6-152) - Brand orders(ORDER)
Status:	The Action was processed successfully.

Step Name	Procedure Name	Work Queue Name	Arrival Date/Time	Step Type	Locked By	Deadline Date/Time	Path
APPROVAL	ORDER	franko	02/07/2010 10:48:00	Normal		02/07/2010 10:49:00	APPROVAL
NOTIFY	ORDER	adm0003	02/07/2010 10:49:00	Normal			NOTIFY

Manage Case
Show cases of ORDER
View processes

For the most part, the information provided on the list of outstanding items is the same as found on work item lists. For descriptions of each of the columns, see Work Item Lists on page 30.

An exception is the **Work Queue** column, which shows you whose work queue the outstanding work item is in. If there is no entry in the **Work Queue** column, the outstanding item is for a step that doesn't result in a work item — it resulted in some other action, such as an external program being started, a sub-procedure being called, etc.

Another column that appears on the list of outstanding work items that doesn't appear on the work item list is **Path** — this pertains to sub-cases — for information, see Viewing Sub-Case Information on page 61.

Also note that the **Arrival Date/Time** column allows you to determine how long each item has been outstanding, i.e., how long the process has been halted along that path.

From the list of outstanding work items, you can also display other screens by using the links provided in the lower-left part of the screen, as follows:

— **Manage Case** - Returns you to the **Manage Case** dialog.

— **Show cases of** *ProcessName* - Redisplays the case list.

— **View processes** - Returns you to the process list.

Viewing Sub-Case Information

By default, the outstanding work item list shows outstanding work items that are located in sub-cases that are currently outstanding. The following example shows both the outstanding sub-procedure call step, as well as the outstanding work item in the sub-case:

Figure 41 Example Outstanding Sub-Case

Status of the last request

Outstanding Steps:	Tarbit Flange 665-NO (19-5653) - Quantity(QUANTITY)
Status:	The Action was processed successfully.

Step Name	Procedure Name	Work Queue Name	Arrival Date/Time	Step Type	Locked By	Deadline Date/Time	Path
CHECKIT	CREDCHK	franko	09/08/2010 15:03:00	Normal			CREDIT|CHECKIT
CREDIT	QUANTITY		09/08/2010 15:03:00	SubProcCall			CREDIT

Manage Case
Show cases of QUANTITY
View processes

When the list of outstanding work items contains a sub-case, the **Path** column provides the *path* to the outstanding step, relative to the main procedure. This allows you to determine if the outstanding step is in the main procedure or a sub-procedure.

For example, if the path is something like “CREDIT”, it is a step in the main procedure. If it consists of multiple step names separated by vertical bars, the outstanding step is located in a sub-procedure. For example, if the path is “CREDIT|CHECK”, the CREDIT step is in the main procedure and the CHECK step is in a sub-procedure (CREDIT would be a sub-procedure call step).

If the case contains *dynamic sub-procedure call steps* or *graft steps* that start multiple sub-procedures, the name of the dynamic sub-procedure call step or graft step in the Path will include an *index* in square brackets. The index (which is zero based) indicates the sequential order in which the sub-procedure was started by the engine for that dynamic sub-procedure call step or graft step. It allows you to identify the path through multiple sub-procedures to the desired outstanding item. For example, a path of “DYNAMIC[0]|STEP1” tells you that DYNAMIC is a dynamic sub-procedure call step in the main procedure; the first sub-procedure it started resulted in STEP1 being outstanding.

Predicting the Future Outcome of the Case

Case prediction provides the means for predicting the expected outcome of a live case. Running the case prediction function causes a list of “predicted work items” to be returned that represent the work items that are currently due (outstanding work items), as well as the work items that are expected to be due in the future.

Included with the predicted work items returned is information about the expected times the work items are predicted to start and end, providing information that can be used to predict the outcome of the case. This can be used to improve work forecasting and estimate the expected completion of cases.

An example use of case prediction is to determine all work expected to be performed for a particular patient during his expected stay in the hospital.

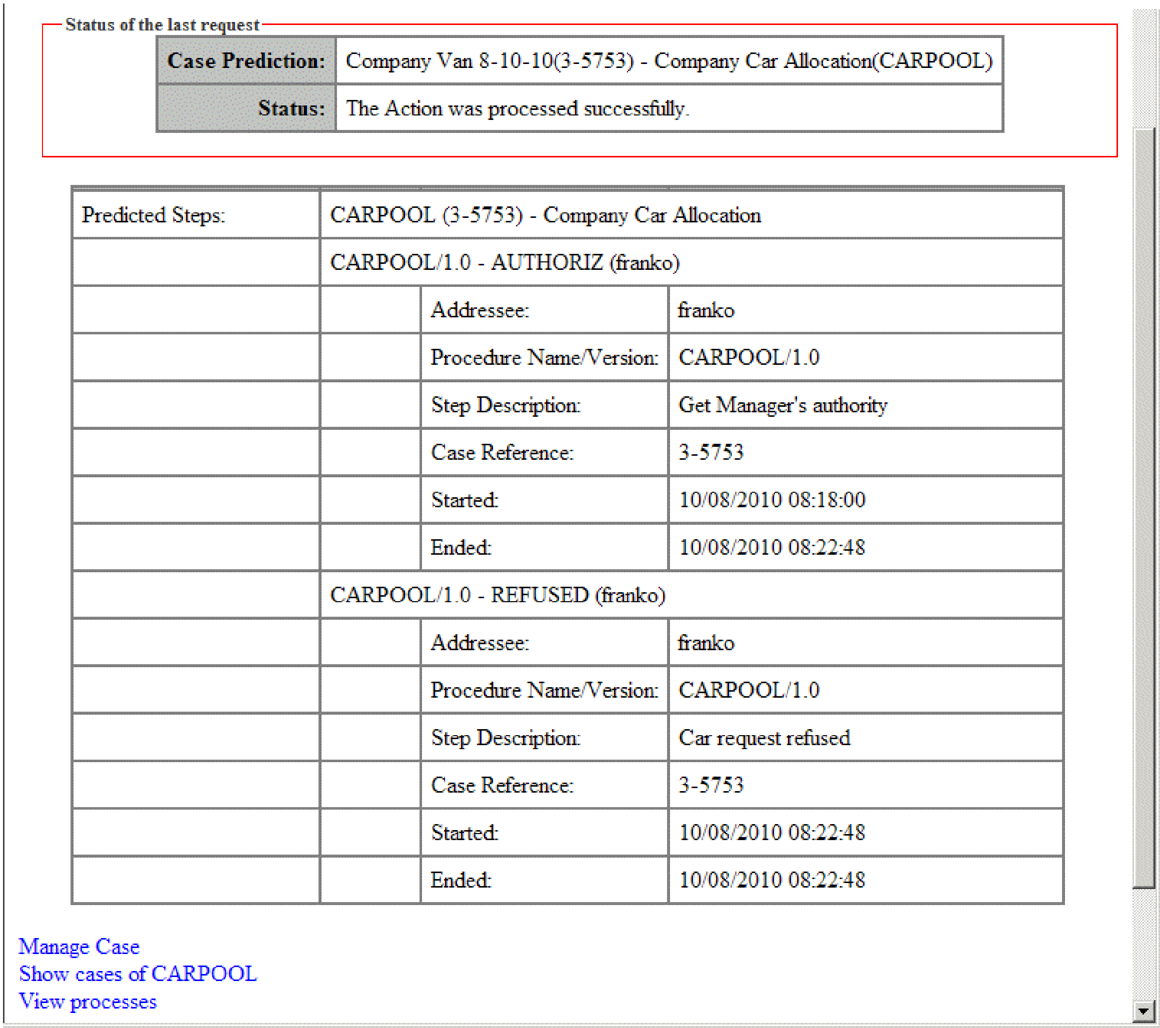
The prediction process moves through the case step-by-step using case data that has been entered so far in the case. Each step uses an expected duration (decided at design time) to calculate a start and end processing time for each step as it progresses through the prediction process. When the process is complete, you can use these end processing times to predict the outcome of the case.

During the prediction process, deadlines are processed, and withdrawal actions are performed, where appropriate.

To perform a case prediction:

1. Display the case list.
2. Click on the **Manage Case** link in the **Manage** column for the case whose outcome you are predicting.
3. Below the Case Summary for the case, click the **Predict future steps** link. A screen similar to the following is displayed:

Figure 42 Example Predicted Work Items


Status of the last request

Case Prediction:	Company Van 8-10-10(3-5753) - Company Car Allocation(CARPOOL)
Status:	The Action was processed successfully.

Predicted Steps:	CARPOOL (3-5753) - Company Car Allocation		
	CARPOOL/1.0 - AUTHORIZ (franko)		
		Addressee:	franko
		Procedure Name/Version:	CARPOOL/1.0
		Step Description:	Get Manager's authority
		Case Reference:	3-5753
		Started:	10/08/2010 08:18:00
		Ended:	10/08/2010 08:22:48
	CARPOOL/1.0 - REFUSED (franko)		
		Addressee:	franko
		Procedure Name/Version:	CARPOOL/1.0
		Step Description:	Car request refused
		Case Reference:	3-5753
		Started:	10/08/2010 08:22:48
		Ended:	10/08/2010 08:22:48

This provides a list of the *predicted steps* — the currently outstanding steps, and steps predicted to be outstanding as the case is processed to completion. For each step, it also indicates, in parentheses, the addressee of the step.

In this example, the case is predicted to end at 8:22 AM on August 10, 2010.

From the prediction dialog, you can also display other screens by using the links provided in the lower-left part of the screen, as follows:

— **Manage Case** - Returns you to the **Manage Case** dialog.

— **Show cases of** *ProcessName* - Redisplays the case list.

— **View processes** - Returns you to the process list.

Closing a Case

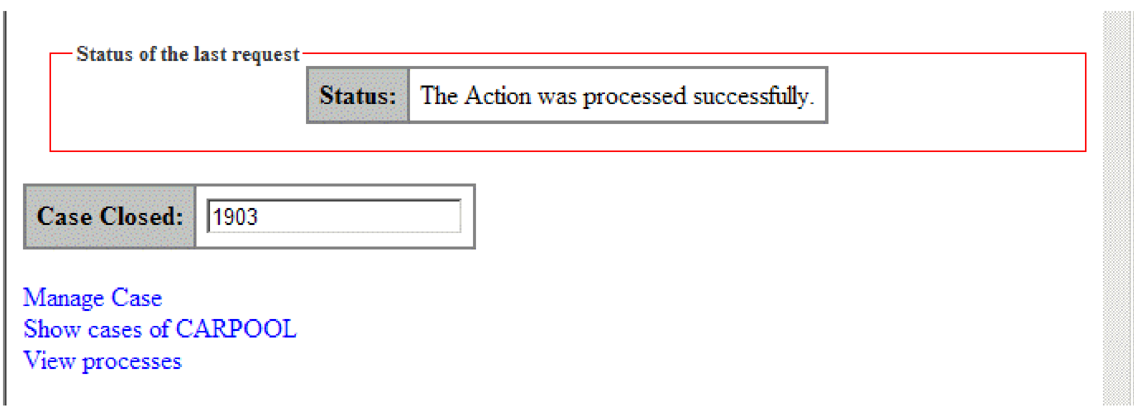
You can *close* a currently active case of a process, making it *inactive*. This stops the process flow for the case and removes all work items associated with the case from all work item lists.

To close a case:

1. Display the case list.
2. Click on the **Manage Case** link in the **Manage** column for the case you want to close.
3. Below the Case Summary for the case, click the **Close** link.

   When the case is successfully closed, a dialog similar to the following is displayed.

Figure 43 Closed Case



Once you close a case, the **Completed** column in the case list is filled in with the date and time you closed the case. The audit trail for that case will also show who closed the case and the date and time it was closed.

From the close case confirmation dialog, you can also display other screens by using the links provided in the lower-left part of the screen, as follows:

— **Manage Case** - Returns you to the **Manage Case** dialog.

— **Show cases of** *ProcessName* - Redisplays the case list.

— **View processes** - Returns you to the process list.

Purging a Case

Purging cases permanently deletes them from the system. You can purge both active and closed cases.

You must have system administrator authority to purge cases.

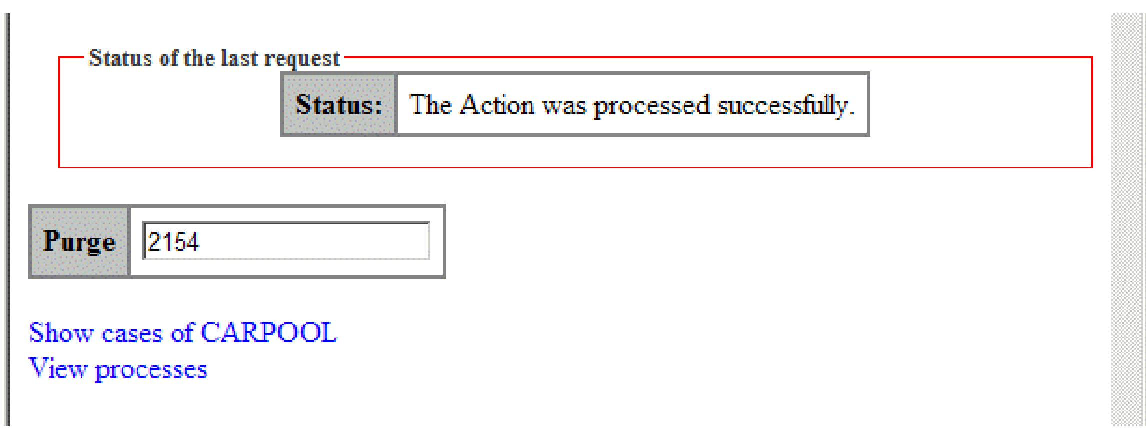
To purge a case:

1. Display the case list.
2. Click on the **Manage Case** link in the **Manage** column for the case you want to purge.
3. Below the Case Summary for the case, click the **Purge** link.

   A confirmation dialog is displayed.
4. Click either **OK** to continue the purge, or **Cancel** to cancel the operation.

   When the case is successfully purged, a dialog similar to the following is displayed.

Figure 44 Purged Case



From this dialog, you can display other screens by using the links provided in the lower-left part of the dialog, as follows:

— **Show cases of** *ProcessName* - Redisplays the case list.

— **View processes** - Returns you to the process list.

Suspending a Case

You can *suspend* activity in a case. Note that when you suspend a case, you are suspending the entire *case family*, which includes the main case and all of its sub-cases, if any.

When a case is suspended, current work items from that case can no longer be opened.

If a work item is already open when the case is suspended, the work item can still be kept, which causes the work item to become immediately suspended, and it cannot be opened again until the case is reactivated. The opened work item can also be released; this causes any new work items as a result of the release to become immediately suspended (unless they are flagged to ignore suspensions; see Ignoring Case Suspensions on page 67).

Other effects of suspending a case are:

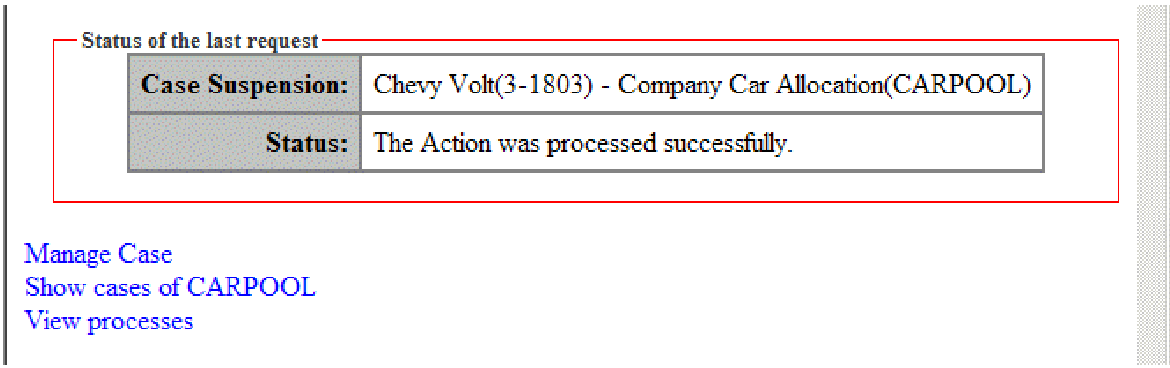
- **Deadlines** will continue to expire. However, if a deadline expires while the case is suspended, no action will be carried out until the case is reactivated. Once the suspended case is reactivated, the process flow will proceed as if the deadline just expired.
- **Withdrawals** will not occur while a case is suspended. For example, if a deadline expires (which occurs during suspensions), and the deadline definition states to withdraw the work item, the withdrawal will occur after the case has been reactivated.

To suspend a case:

1. Display the case list.
2. Click on the **Manage Case** link in the **Manage** column for the case you want to suspend.
3. Below the Case Summary for the case, click the **Suspend** link.

   When the case is successfully suspended, a dialog similar to the following is displayed.

Figure 45 Suspended Case



Once a case is suspended, the **Completed** column on the case list shows "Suspended".

From the suspended case confirmation dialog, you can also display other screens by using the links provided in the lower-left part of the screen, as follows:

— **Manage Case** - Returns you to the **Manage Case** dialog.

— **Show cases of** *ProcessName* - Redisplays the case list.

— **View processes** - Returns you to the process list.

Ignoring Case Suspensions

When a process is defined, a step can be flagged to ignore case suspensions. If flagged to ignore case suspensions, a step is processed normally even if the case in which it is located has been suspended, i.e., work items representing that step can be opened and processed as desired.

Activating a Suspended Case

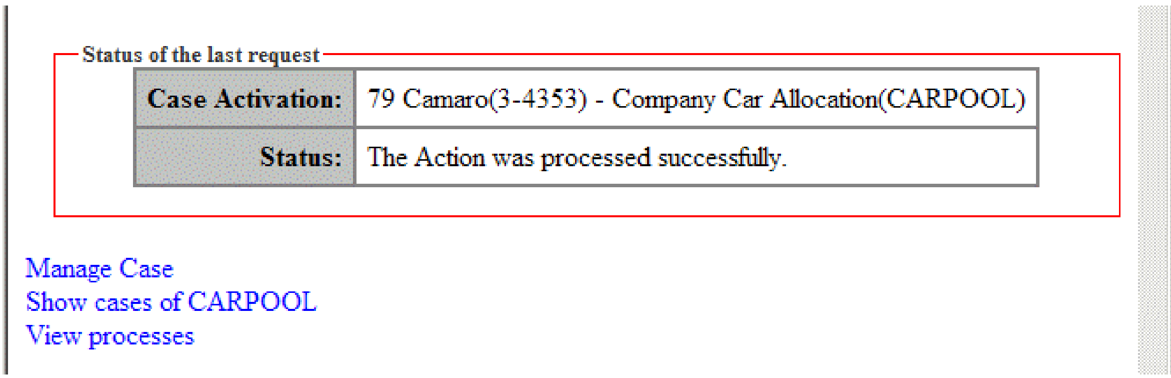
Activating a suspended case causes the process to flow as usual. Work items that were suspended because the case they are a part of was suspended can now be opened and processed normally.

To activate a suspended case:

1. Display the case list.
2. Click on the **Manage Case** link in the **Manage** column for the case you want to re-activate.
3. Below the Case Summary for the case, click the **Activate** link.

When the case is successfully activated, a dialog similar to the following is displayed.

Figure 46 Activated Case



From the activated case confirmation dialog, you can also display other screens by using the links provided in the lower-left part of the screen, as follows:

— **Manage Case** - Returns you to the **Manage Case** dialog.

— **Show cases of** *ProcessName* - Redisplays the case list.

— **View processes** - Returns you to the process list.