TIBCO iProcess™ Client (JSP)

User's Guide

Software Release 9.2
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TIBCO
The Power of Now®

Important Information

This software may be available on multiple operating systems. However, not all operating system platforms for a specific software version are released at the same time. Please see the readme.txt file for the availability of this software version on a specific operating system platform.

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About This Guide

This guide explains how to use the TIBCO iProcess Client (JSP).

How to Use this Guide

Refer to the following chapters for the information you need:

- Chapter 1, About the TIBCO iProcess Client (JSP) gives an overview of the TIBCO iProcess Client (JSP).
- Chapter 2, Getting Started provides an introduction to using the TIBCO iProcess Client (JSP).
- Chapter 3, Using Work Queues describes how to utilize the work queues.
- Chapter 4, Processing Work Items describes how to open, complete and keep or release your work items.
- Chapter 5, Using Audit Trails describes how to view the audit trail for a case of a procedure.
- Chapter 6, Starting Cases details how to start a case of a procedure.
- Chapter 7, Organizing Your Work Items describes how you can use sort, filter and display options to organize the work items in a queue the way you want to, and how to find specific work items.
- Chapter 8, Managing Participation and Redirection describes how to add, modify and delete a participant record and how to redirect all work items for a queue.

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Target Audience

This guide is aimed at users who are using the TIBCO iProcess Client (JSP) to access their iProcess work queues, start cases of procedures and access audit trails.

The guide assumes that you are familiar with using your web browser. No previous knowledge of iProcess or the TIBCO iProcess Client (JSP) is assumed.

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Changes from the Previous Issue

The following changes have been made from the information presented in the previous issue of this guide:

- Further product re-branding has been carried out in this release, as follows:
  - — TIBCO Staffware Process Suite™ has been renamed TIBCO iProcess Suite™
  - — TIBCO iProcess™ Client (Windows) has been renamed TIBCO iProcess™ Workspace (Windows)
  - — TIBCO iProcess™ Client (Browser) has been renamed TIBCO iProcess™ Workspace (Browser)
  - — The term **Staffware** has been replaced by **iProcess**.

  Until this work is complete you may still see references to Staffware and to the old product names within the software and in some documentation.

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Where You Can Find More Information

You can find more information related to iProcess and the TIBCO iProcess Client (JSP) from the following sources:

- The *TIBCO iProcess Client (JSP) Installation Guide*, supplied with the software, explains how to install the software.
- The *TIBCO iProcess Client (JSP) Customization Guide* gives detailed information about configuring the TIBCO iProcess Client (JSP).
- A **Readme** file, supplied with the software, provides any last minute and version-specific information that could not be included in the main documentation. Please see the *TIBCO iProcess Client (JSP) Installation Guide* for more information about this file.
- This guide is available as online help from within the TIBCO iProcess Client (JSP).
- Detailed information about using the TIBCO iProcess Suite ™ can be found on the TIBCO iProcess Suite Documentation Library CD.
- There is also a useful resource, **http://power.tibco.com**, that delivers technical content to the TIBCO user community. This site has been developed to foster an open forum where users of TIBCO products can find valuable information, example projects and resources for those projects, and exchange ideas with other users. Entry to this site requires a username and password. If you do not have a username, you can request one.
- For the latest TIBCO iProcess Suite™ product information, please refer to the TIBCO Support web site at **http://www.tibco.com/services/support**.

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Documentation Conventions

Because this guide covers both Windows and UNIX versions of the TIBCO iProcess Client (JSP), this guide uses the Windows convention of a backslash (\). The equivalent pathname on a UNIX system is the same, but using the forward slash (/) as a separator character.

Note - UNIX pathnames are occasionally shown explicitly, using forward slashes as separators, where a UNIX-specific example or syntax is required.

The following conventions are used throughout this guide:

Convention	Description
italics	Indicates emphasis, variables and manual titles.
`monospace text`	Indicates code samples, commands and their options, directories and filenames. Any text that you must enter from the keyboard is displayed as monospace text.
`monospace italic text`	Indicates variables in commands.
{ }	Indicates a set of choices in a syntax line. The braces should not be entered.
[ ]	Indicates optional items in a syntax line. The brackets should not be entered. **Example:** SHOW_ALL_ATTRIBUTES [attribute]
|	Indicates mutually exclusive choices in a syntax line i.e. you enter only one of the given choices. You should not enter the symbol itself.

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Convention	Description
SWDIR	Indicates the iProcess system directory where the TIBCO iProcess™ Engine is installed. **Example:** If *SWDIR* is set to **swserver****staffw_nod1** then the full path to the **swutil** command would be: • on a Windows server (on the **c:** drive): **c:\swserver\staffw_nod1\bin\swutil** • on a UNIX server: /**swserver/staffw_nod1/bin/swutil**, or $SWDIR/**bin/swutil** **Note: On a UNIX system, the environment variable $SWDIR should be set up to point to the iProcess system directory for the root and swadmin users.**

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Chapter 1 About the TIBCO iProcess Client (JSP)

This chapter gives you a brief overview of the TIBCO iProcess Client (JSP) - what it is and what you can do with it.

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What is the TIBCO iProcess Client (JSP)?

The TIBCO iProcess Client (JSP) enables organizations to extend their iProcess Suite over the internet and intranets enabling staff to participate in a procedure irrespective of where they are or what time it is. It enables organizations to integrate their business partners, customers and suppliers directly in their process, streamlining many activities and shortening process times dramatically.

What is the TIBCO iProcess Suite?

The iProcess Suite is a Business Process Management application that allows organizations to automate their business processes, or Procedures - from simple leave requests to complex sales order processing applications. By using iProcess to model a procedure and add control mechanisms, an organization can ensure that the right work is done at the right time by the right people.

Any routine business procedure can be implemented as follows:

- The procedure is modeled as a flowchart using the TIBCO iProcess™ Modeler. The flowchart defines the different steps which must happen, the order in which they occur and the data and people involved.
- Once a procedure has been defined the iProcess Engine can run it. When somebody starts to use the procedure on a new case, the iProcess Engine processes it according to the procedure rules, passing work items to users' work queues as required.
- Users use iProcess Workspace to examine their Work Queues and process the Work Items in them - usually by filling in an electronic form and then releasing the work item back to iProcess, where the node receives it and processes the next step in the procedure. Authorized users can start new cases of procedures or use audit trail facilities to check on the progress of existing cases.

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What can I do with the TIBCO iProcess Client (JSP)?

The TIBCO iProcess Client (JSP) enables you to:

- Open and look through your Work Queues (your Personal Queue and any Group Queue or Test Queues that you have access to).
- Open individual work items.
- View and enter data into a form to complete a work item.
- Keep work items in your queue or release them back to iProcess.
- Forward work items to different queues.
- Set sort, filter or display options on your work queues.
- Search for specific work items in any queue.
- Start new cases of procedures.
- Use Case Prediction to forecast outstanding and expected work items.
- Change the priority of a work item.
- Use participation to grant users temporary access to another user or group queue.
- Use redirection to redirect all work items sent to one queue to an alternative queue.

The rest of this guide explains these steps in detail.

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Chapter 2 Getting Started

This chapter explains how to start and stop the TIBCO iProcess Client (JSP), and describes the main area you see in the TIBCO iProcess Client (JSP) window.

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Starting the TIBCO iProcess Client (JSP) from your Browser

To start the TIBCO iProcess Client (JSP) you need to visit the TIBCO iProcess Client (JSP) startup page.

Your system administrator determines how you get to this page, for example, by typing in its URL or by clicking on a hyperlink from another page. If you do not know how to reach the appropriate page, contact your iProcess System Administrator.

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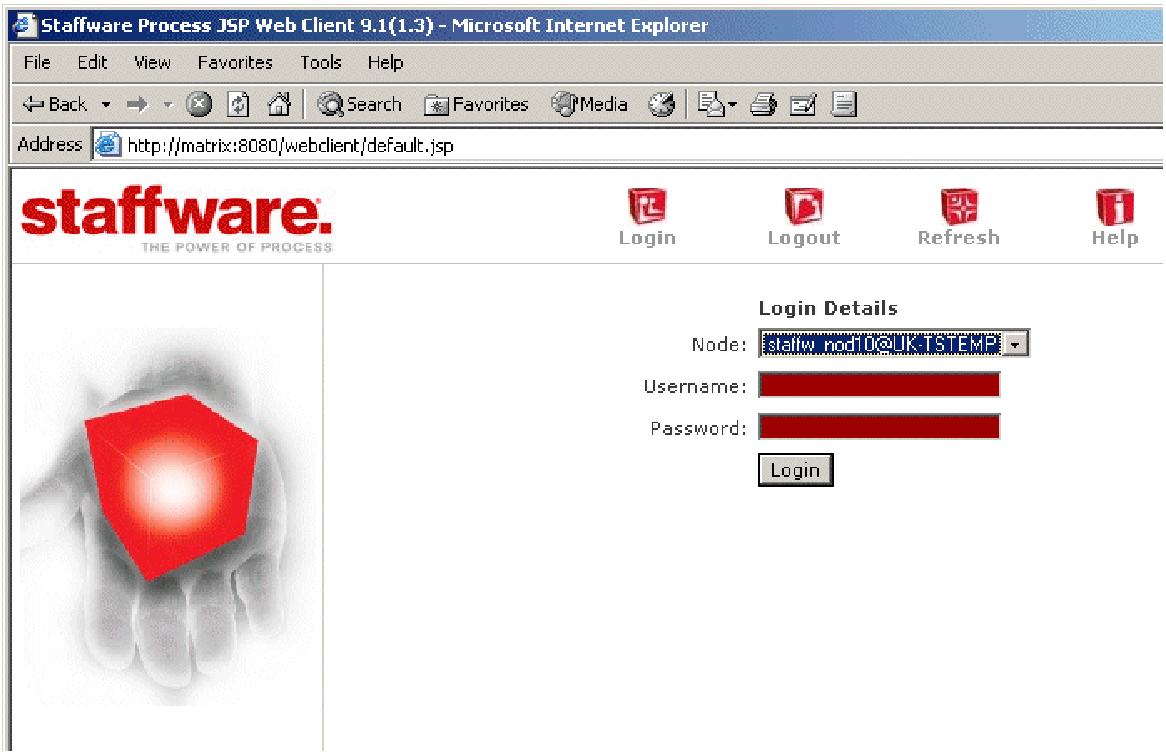
Logging in to an iProcess Engine

To log in to iProcess:

1. Using your browser, visit the TIBCO iProcess Client (JSP) startup page. The TIBCO iProcess Client (JSP) login screen is displayed:



2. Select the iProcess Engine you want to connect to from the drop-down list. Press <**Tab**> to move to the **Username** field or click the field.
3. Type in your iProcess Username.
4. If your iProcess installation has been set to require a Password, press <**Tab**> to move to the password field or click on the **Password** field. Type in your iProcess password.
5. Click **Login**.

The TIBCO iProcess Client (JSP) logs you in to your chosen iProcess Engine and displays your user folders of Work Queues, Audit Trail, Case Start and Tools (see The TIBCO iProcess Client (JSP) Window below).

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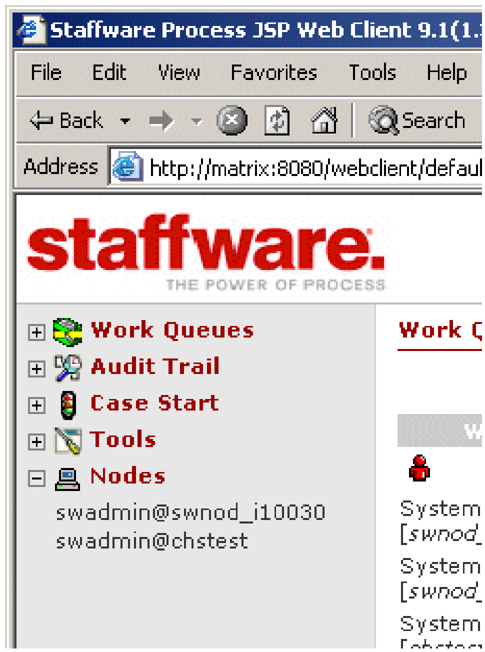
Logging in to iProcess Engines

You can log in to more than one iProcess Engine at a time. To do this, click **Login** and select a different iProcess Engine from the list available and enter your Username and Password (if required).

To display the list of iProcess Engines you are logged into, click **Nodes**. A list of iProcess Engines that you are logged in to is displayed.



Having Problems?

If you encounter problems logging in, try the following:

1. If you get an error while logging in, you will need to click **Login** or **Refresh** to return to the login screen. Clicking your browser's **Back** button will not work.
2. Check that you are trying to log in to the correct node and that your user name and password are correct.
3. If you are still having problems, contact your iProcess System Administrator.

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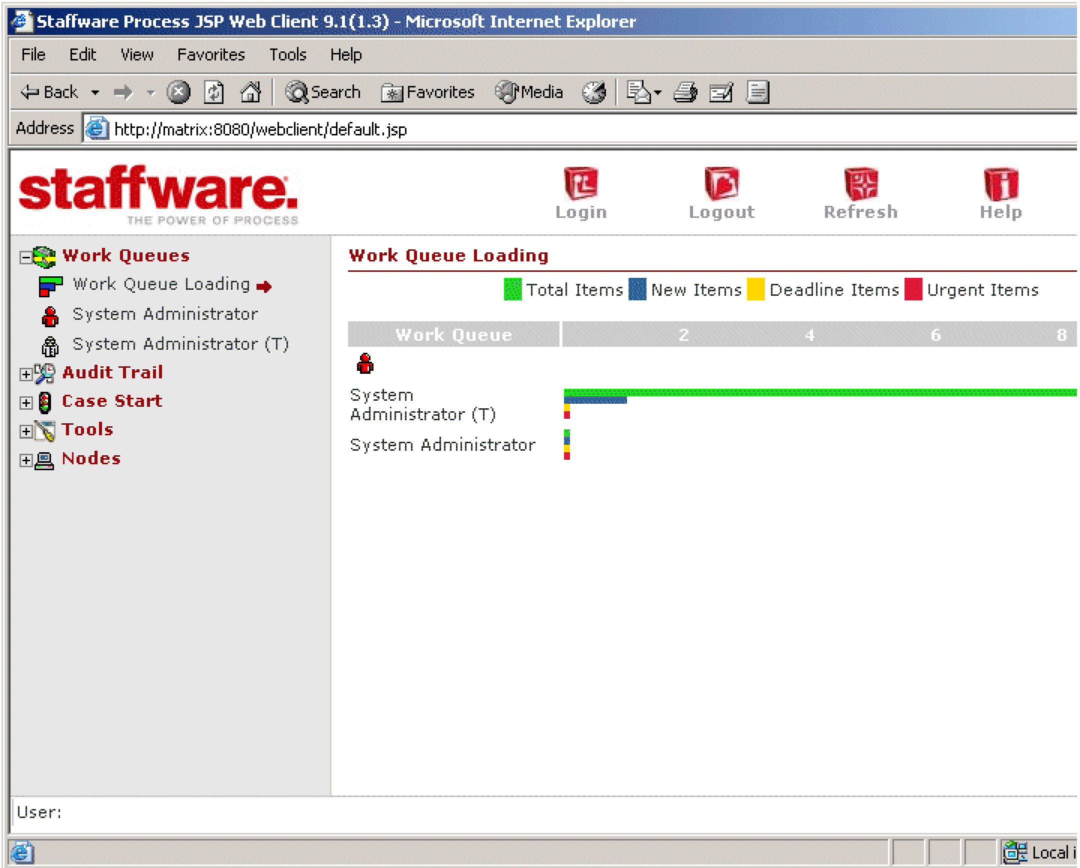
The TIBCO iProcess Client (JSP) Window

The TIBCO iProcess Client (JSP) window shows the options you have access to. These are displayed on the left hand side of the window.



By default, the **Work Queue Loading** chart is displayed when you log in. See Work Queue Loading Chart, Personal Queues and Group Queues for more information about what is contained in the **Work Queues** folder.

The right hand side of the window is where your work queue details, forms and audit trail lists are displayed when you select the appropriate item. These are described in detail in the following chapters.

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Configuring Your Default Page View in the TIBCO iProcess Client (JSP) Window

When you first login to the TIBCO iProcess Client (JSP), the Work Queue Loading chart is displayed by default.

You can configure the TIBCO iProcess Client (JSP) so that your personal work queue or a particular group queue is displayed instead. This means that when you first log in, the TIBCO iProcess Client (JSP) displays your work queue automatically. This is useful if your system has a large number of work queues but you generally work with one particular queue.

To set a work queue to be the default view:

1. Click **Work Queues** on the left hand side of the screen. A list of all work queues that you are a member of is displayed.
2. Click the work queue you want to set as your default view.

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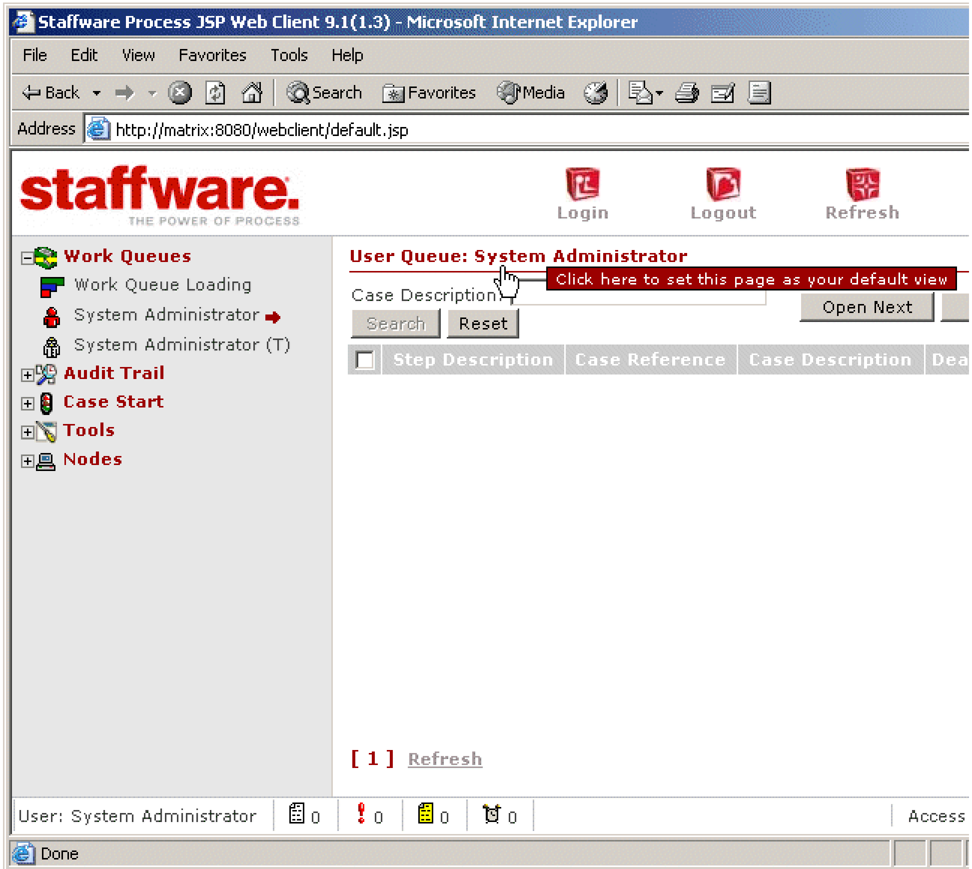
3. Click **User Queue: <*Username*>** at the top of the window to set the work queue as your default view as shown below.



Next time you login, your chosen work queue is displayed automatically.

To reset the Work Queue Loading chart as the default view, click **Work Queue Loading** from **Work Queues** and click **Work Queue Loading** at the top of the window.

Refreshing your TIBCO iProcess Client (JSP) Window

The TIBCO iProcess Client (JSP) periodically (by default, every 60 seconds) checks your queues and updates the lock status, priority and deadline of each work item in the currently open queues.

However, you can refresh your TIBCO iProcess Client (JSP) window at any time by clicking **Refresh** at the top of the window. This will update the list of work queues, and the list of procedures available for audit trails and case start.

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You can also update the contents of the currently selected work queue and status bar by clicking **Refresh Queue** at the bottom of the currently displayed page.

Internet Explorer must be set for the screen refresh to work correctly. From Internet Explorer, select **Tools > Internet Options**. On the **General** tab under **Temporary Internet Files**, select **Settings** and ensure that **Automatically** is selected.

Using Browser Navigation

Whilst using the TIBCO iProcess Client (JSP), it is important that you do **NOT** use the browser's **Back** and **Forward** buttons. Using these can cause unpredictable problems particularly when keeping and releasing forms. See Keeping and Releasing Work Items.

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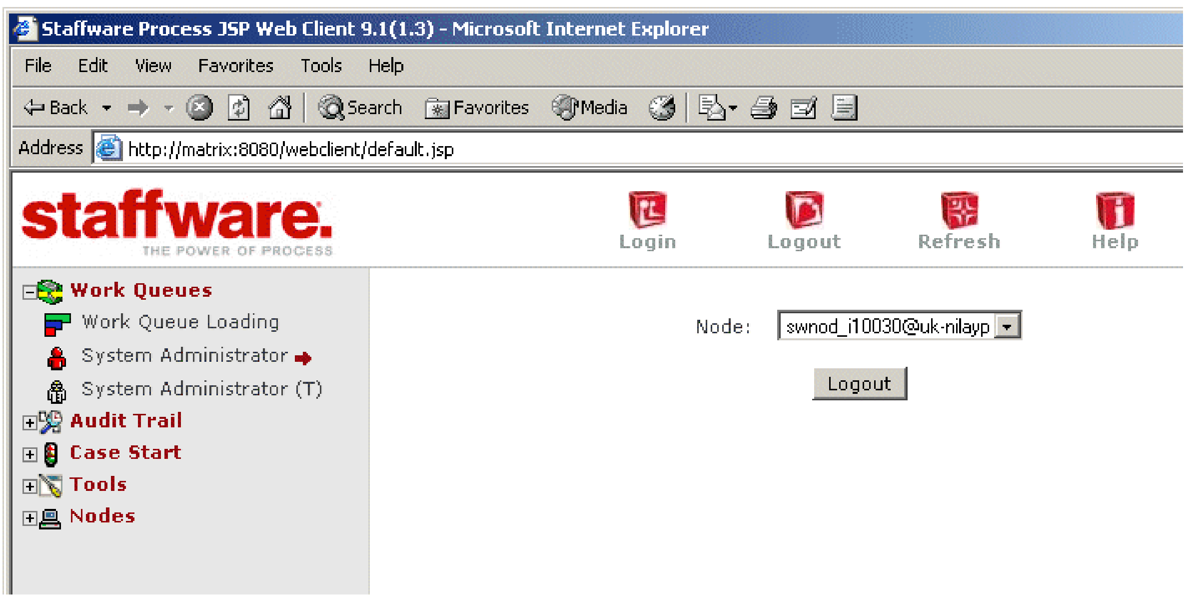
Logging Out and Closing the TIBCO iProcess Client (JSP)

When you have finished your work you should log out of the TIBCO iProcess Client (JSP). To do this:

1. Keep or Release any work items that are still open.
2. Click **Logout**.
3. Highlight the Node in the drop down list that you want to log out from and click **Logout**.



If you are logged in to more than one node, depending on whether or not you have configured a default view, you are either returned to:

- the default view of the first node you logged in to, or
- the Work Queue Loading chart in the TIBCO iProcess Client (JSP) window.

In **Nodes**, the list of nodes you are logged in to is refreshed.

If you were logged in to one node only, you are returned to the TIBCO iProcess Client (JSP) startup page. You can either log in again to an iProcess Engine, visit another web site or close your browser.

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Chapter 3 Using Work Queues

This chapter explains how to select and organize your work queues and describes the Work Queue Window.

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Selecting a Work Queue

To select a work queue:

1. Click **Work Queues** on the left hand side of the screen to display the list of all the work queues that you are a member of. These are listed by user name or group name.

   The first time you click **Work Queues**, it may take a few seconds for the work queues to display. It depends on how your iProcess System Administrator has configured the TIBCO iProcess Client (JSP) and how many work queues your iProcess system has. A **Loading**... message is displayed while the work queues are being loaded.

   If you are logged in to more than one node, each node you are logged in to is listed. Click the appropriate node to see all available queues on that node.

2. Click on the work queue you want to display. A red arrow after the queue name indicates the currently selected queue.

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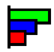
Work Queue Loading Chart, Personal Queues and Group Queues

The work queues list, on the left hand side of the window, lists all the work queues that you have access to. To make them easier to find, queues are organized in the following way:

Symbol	Description
	The Work Queue Loading chart shows you a graphical summary of your current workload across all your queues.
	The Personal Queue contains your personal work queue, which only you can access. (Even iProcess administrators cannot access your personal work queue.) If you are logged in as user **swadmin**, you may also have an *undelivered mail queue*. This list also contains work queues of which you are a participant. See Managing Participation and Redirection for more information on work queue participation.
	Group Queues are group work queues. All users who are members of the same group can work on that group queue. This list also contains work queues of which you are a participant. See Managing Participation and Redirection for more information on work queue participation.
	Test Queues are only displayed if you are a user who is allowed to define iProcess procedures. Test queues are distinguished from personal or group queues by the letter **T**, for example, **system administrator (T)**. The list contains:
	• A test user queue for any unreleased procedures. A test queue is one that relates to procedures under development. It simulates a real queue and is used to test unreleased procedures.
	• A test group queue for any unreleased procedures.

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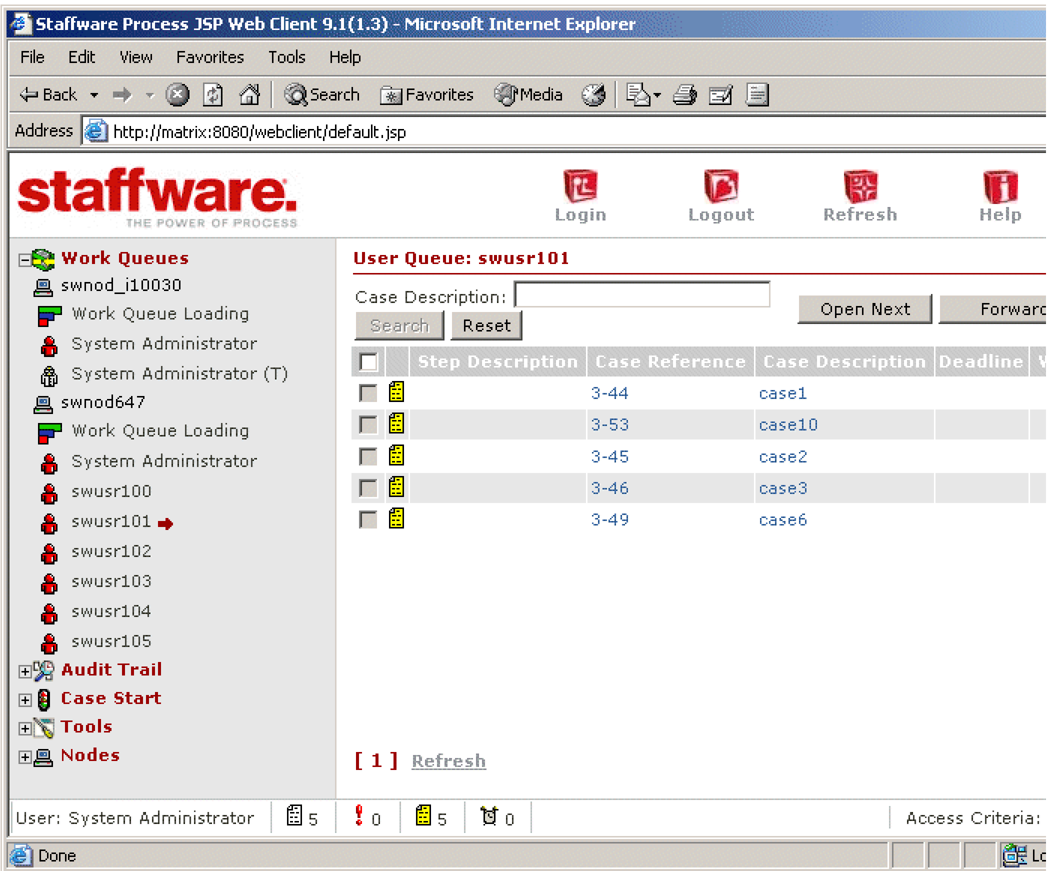
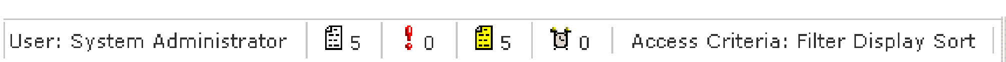
Using the Work Queue Window

When you select a queue to work on, the contents of the queue are displayed.



The Status Bar

The status bar shows information about your queue.



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Status Bar Item	Description
User	Shows the name of the user you are currently logged in as.
	Shows the total number of work items in the queue.
	Shows the number of work items in the queue that have been designated as urgent.
	Shows the number of work items in the queue that have not yet been opened.
	Shows the number of work items in the queue that have Deadlines on them.
Access Criteria	enables you to define the sort, filter and display options on the iProcess Engine. This means you can control the way your queues are displayed in TIBCO iProcess Client (JSP). See Setting Filter, Display and Sort Options.

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What is Displayed in Your Work Queue Loading Chart?

The Work Queue Loading chart shows, in bar chart form, the following information for each visible work queue.

- the total number of items in the queue (in green)
- the number of new items in the queue (in blue)
- the number of items in the queue which have deadlines (in yellow)
- the number of urgent items in the queue (in red)

Use the Work Queue Loading chart if your work is spread across several queues and you want to know where to start; or if you want an 'at a glance' summary of the contents of a very large queue.

Counts and scales shown in the Work Queue Loading chart do not take into account any filters that are set on the queue.

What is Displayed in your Work Queue?

Your Work Queue display can show the following information about each work item in the queue.

The Work Queue display can be changed. (See “Changing the Default Work Queue Display” in the *TIBCO iProcess Client (JSP): Customization Guide* for more information.)

The first column is untitled but is used to select work items to forward to another queue. See Forwarding a Work Item.

The second column is also untitled and displays one or more symbols by each work item to denote its status:

Symbol	Description
	**Unopened Work Item**: This document symbol is displayed in yellow to show that this is an unopened item in the queue.
	**Opened Work Item**: The document symbol displayed in white means that the work item has been opened but returned to the work queue rather than released.
	**Deadline**: The clock symbol means that the work item has a Deadline associated with it. It is displayed in gray and changes to red when the deadline expires.
	**Urgent**: The red exclamation mark means that a work item has been designated as urgent.
	**Locked**: The padlock symbol means that this is a Locked Work Item; either it is currently in use or it has been locked by the system. This can occur when you don’t Keep or Release a work item before logging out of iProcess.

The remaining columns are:

- **Step Description**: This is the name of the form that is displayed when you open this work item.
- **Case Reference**: This is the unique case number that iProcess allocates when the case is started.

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- **Case Description**: This is a short description of the particular case which this work item is part of. The case description is generally supplied by the user who starts the case.
- **Deadline**: If a work item has a deadline associated with it, this column shows the date and time on which the deadline expires.
- **Work Queue Parameter 1**: The title of the last column can vary from one iProcess installation to another as it is a column that can be used to show the values of a specific iProcess field. For example, the title might be **Ref No** with the column displaying the customer reference number.

The order in which these columns appear can be changed. See Setting Display Options for more information.

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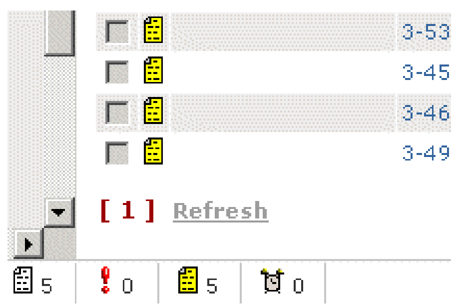
Navigating Through Your Work Queue

Your work queue display enables you to navigate through your work queue page by page.



Click the page links at the bottom of the currently selected page to display the work items on different pages. The currently selected page is displayed as [*page number*].

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Chapter 4 Processing Work Items

Work items are the individual pieces of work - electronic forms - in a work queue which require your attention. To deal with a work item you open it, fill in the form which is displayed, and then Release it from your work queue back to iProcess.

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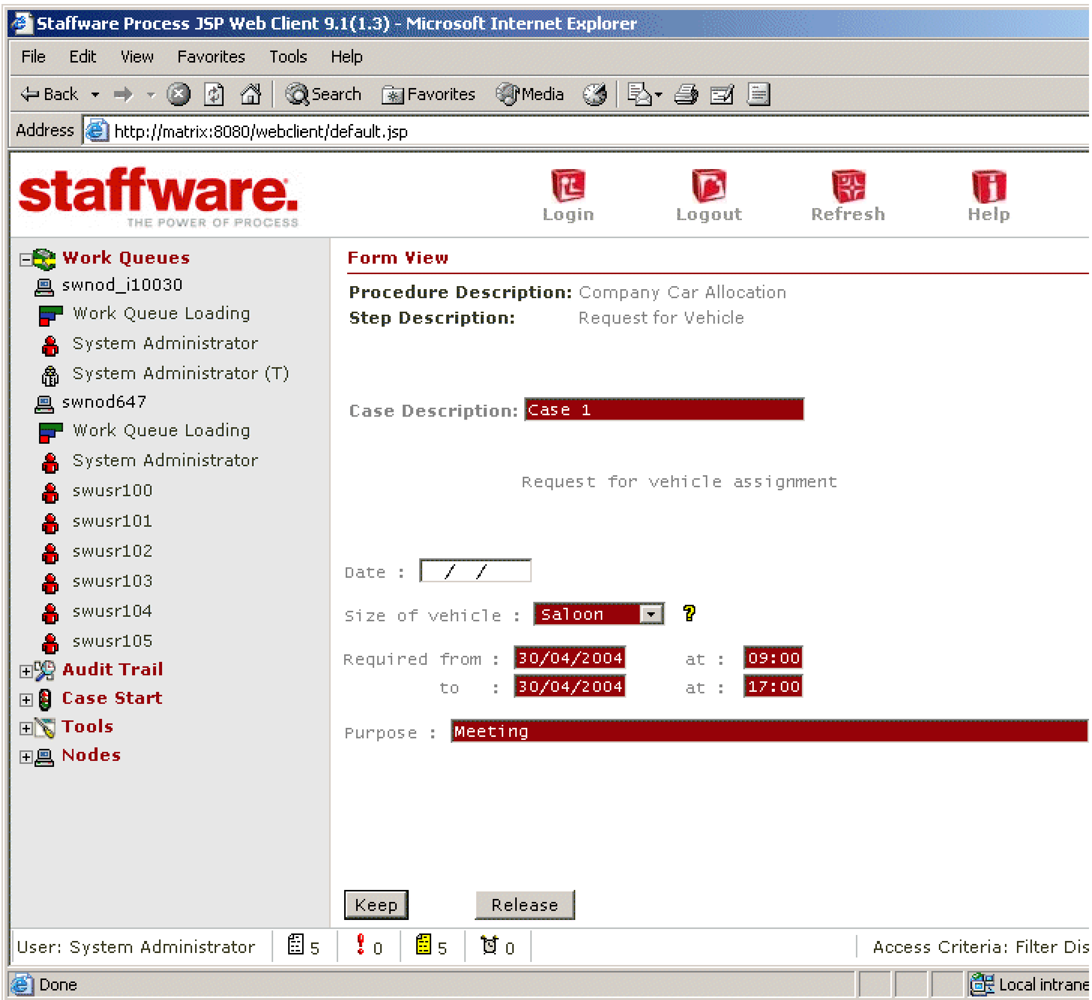
Opening Work Items

To open a work item from the list of items in your queue, click on the item you want to open. The form for that item is displayed.



At the top of the form the procedure description is displayed followed by the case description and step description.

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Locked Work Items

A work item with status is locked. This means that you cannot open it because somebody already has it open. (Locking prevents two people from working on the same work item at the same time.) You will see locked work items in two situations:

- When you open a work item its status immediately changes to locked, and remains so until you keep or release it.
- When you are working in a group queue, items that other users are currently working on are shown as locked.

The TIBCO iProcess Client (JSP) automatically updates the lock status of work items. You will see work items in group queues changing between locked and unlocked as other members of the group work on them.

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Filling in Forms

The majority of forms have input fields for you to enter information into. To enter information into a field:

1. Click the field.
2. Type the information in the field.
3. Press **Tab** to move to the next field or click the next field. (Using <**Return**> or <**Enter**> will not move you to the next field).

Some forms may only display information and will not have any fields to fill in.

Field Types

The information that you can enter into a field depends on the field type. The field type can generally be ascertained by the information provided on the form by the procedure definer.

Field Type	Characteristics of Input	Example
Text	Any characters	56 Bath Crescent
Numeric	Any numeric characters	2789
Comma Separated Numeric	As numeric but iProcess automatically displays commas to separate the thousands.	1,234,567.89
Date	By default, dd/mm/yyyy, but your System Administrator may change this.	24/03/2003
Time	The format is hh:mm	07:30
Memo	Large amounts of text (stored in a separate file).	

If you try to enter the wrong kind of information, such as text in a date field, it will not be accepted by iProcess and the field will return to a blank when you tab off it.

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Field Origins

Fields are shown in different ways depending on what you need to do with them. This is called the **Field Origin**:

Origin	Display	Action
Required	Displayed in red	You must complete this field before you can **Release** the work item.
Optional	Displayed in blue	You can enter information into this field but you do not have to.
Display	Displayed in white	This field is for information only. You cannot enter information into it. The information will have been entered in a previous step.

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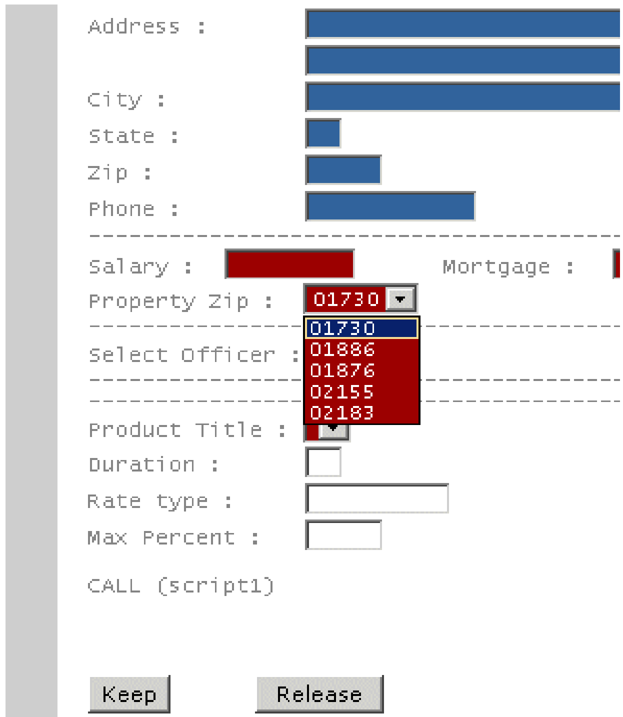
Drop-down Lists

A field that has a selection of responses that you can choose from is shown with a drop-down list.



To select an item from the drop-down list, click the appropriate item.

Click the down arrow next to the field to show or hide the contents of the list.

Alternatively, typing the first letter of the item takes you to the first entry beginning with that letter.

When the list is displayed with a blank field, you can enter any value into the field and it is automatically added to the list.

Field Help

If fields have help information provided by the procedure definer, then a help icon is displayed next to the field.

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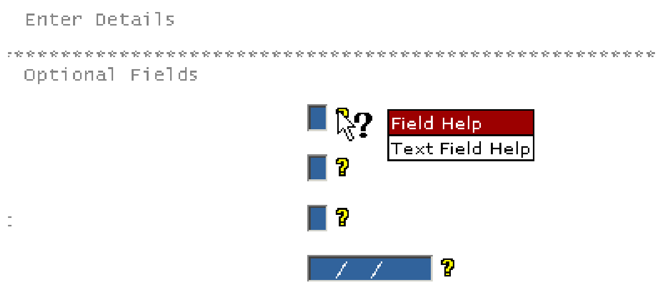
Hold the cursor over the help icon and help is displayed in a pop-up box.



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Keeping and Releasing Work Items

When you have finished working on your form you can either Keep or Release it by clicking the appropriate button at the bottom of the form.

Keeping a Work Item

When you Keep a work item you are returning it to the work queue. Any information you have entered into fields is saved and you can re-open the work item at a later date.

Click the **Keep** button at the bottom of the form.

Releasing a Work Item

When you have finished working on a form and all of the Required fields are completed, you can Release it. This means that the work item is removed from the work queue and the next step in the procedure is processed by iProcess.

Click the **Release** button at the bottom of the form.

You MUST either Keep or Release open work items before closing your browser. If you do not, any information you have entered will be lost and the work item will be locked. A locked work item in a group queue cannot be opened by any other member of that queue. A locked work item can usually be forced open by the user that locked it or by the iProcess System Administrator.

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Forwarding a Work Item

You may be able to forward certain work items from your queue to other queues. Forwarding enables you to pass a work item on to another queue without progressing the case.

The procedure definer determines whether or not a particular work item can be forwarded when they set up a procedure. For example, a procedure may be set up which sends all new work items for a group queue to a supervisor, who can then forward them on to different people in the group, according to their current workload.

Whether you as a user can forward work items also depends on the setting of your USERFLAGS attribute - see “Changing a User’s Attribute values” in the *TIBCO iProcess Workspace (Windows) Manager’s Guide*.

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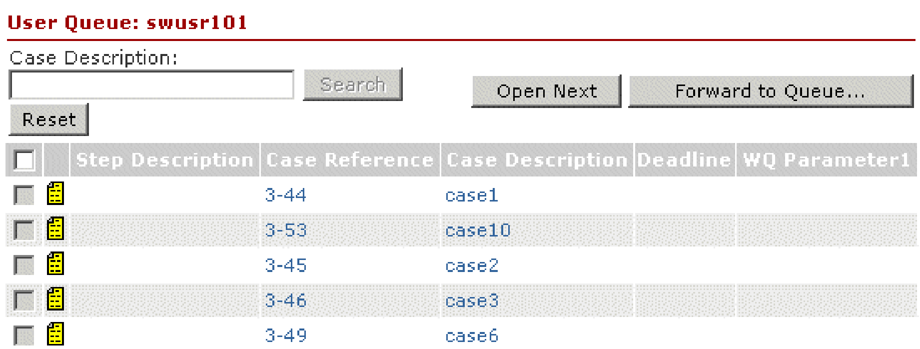
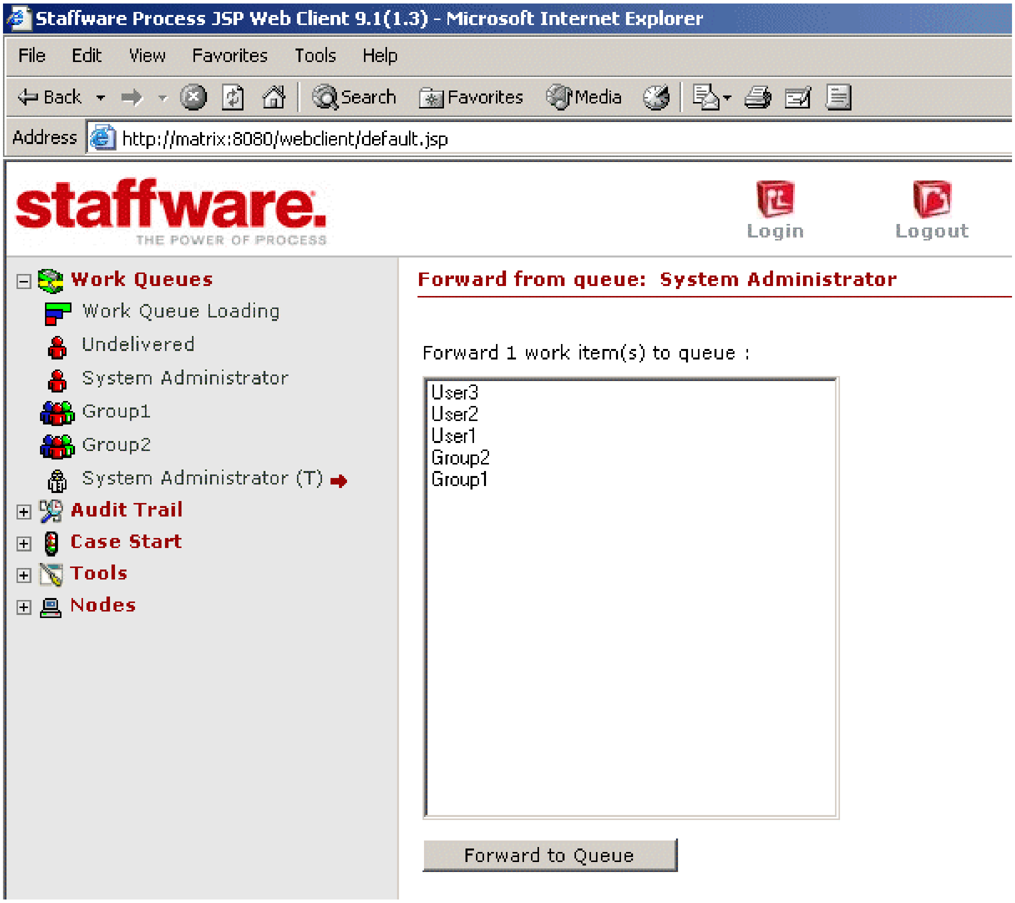


To forward a work item to another queue:

1. Select the work item you want to forward by clicking the box for the work item in the first column. You can select as many work items as you need. If you want to forward all work items on the current page (to the same queue), click the box at the top of the first column so that all the work items on the page are selected.

   If the box beside the work item is grayed out, you cannot forward this item to another queue.

2. Click **Forward to Queue**. The **Forward from queue:** ***username*** page is opened.



3. From the **Forward *n* work item(s) to queue:** box, select the user you want to forward the work item to.

You cannot forward work items to test queues or (if you are logged in as **swadmin**) to the **Undelivered** Work Items queue. Consequently these queues are never listed.

4. Click **Forward to Queue**.

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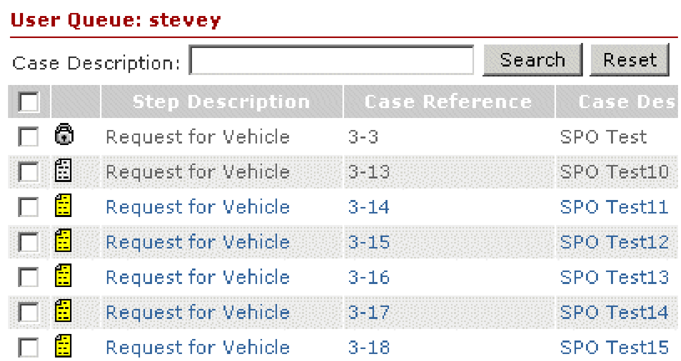
Finding Particular Work Items

The TIBCO iProcess Client (JSP) provides two search facilities:

- You can find specific work items from any work queue by searching on a work item's **Case Description**, using **Work Queue Search** from the **Tools** folder. See Searching for Work Items.
- You can find a specific work item from a specific queue, as illustrated below.



To find a particular work item:

1. Type the characters you want to search for in the **Case Description** box.

   You can use wildcard characters in your search criteria: **?** will match *any one character* at the position it is included; * will match *zero or more of any characters* at the position it is included.

2. Click **Search** to start the search.

   The work items in the queue that match your search criteria are displayed.

3. To perform a new search, click **Reset** to clear the search criteria from the **Case Description** box.

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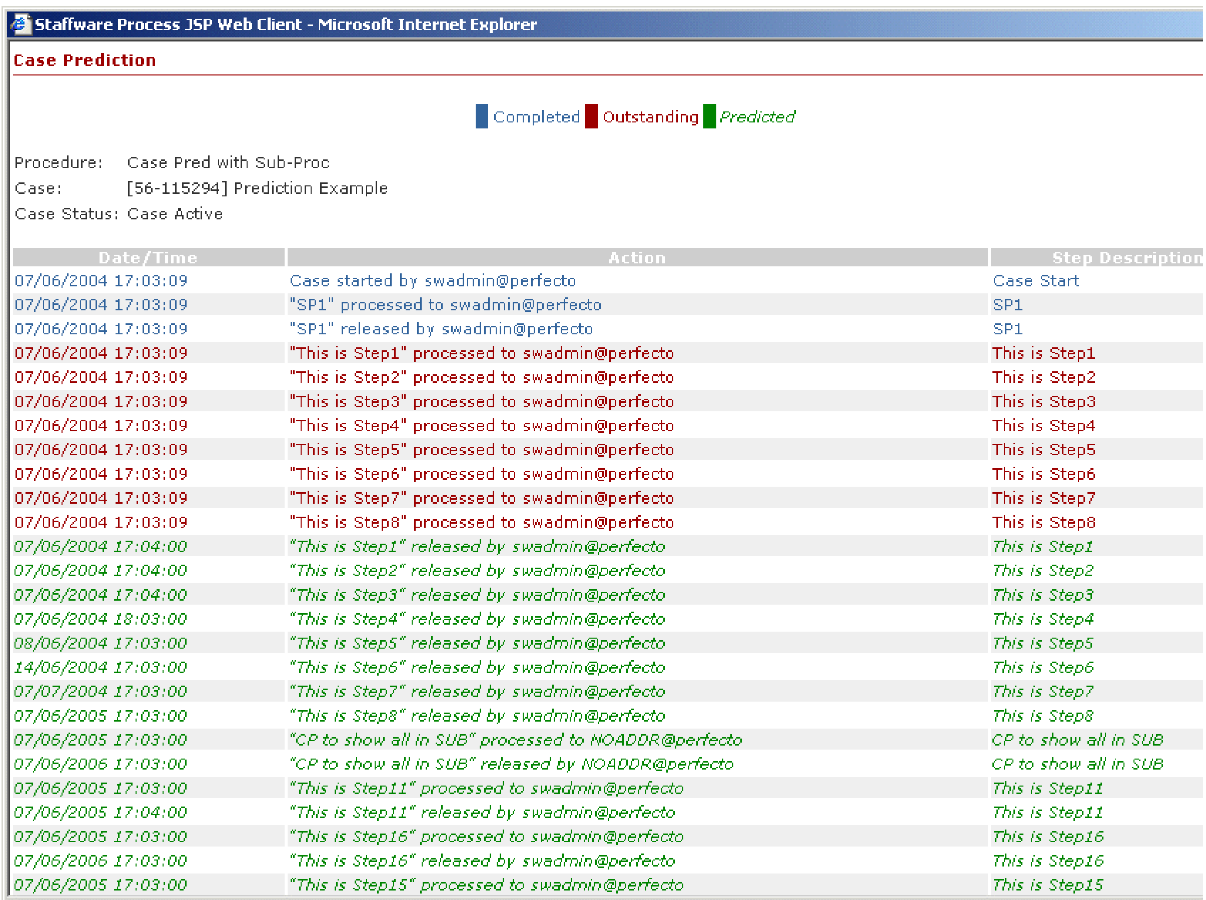
Predicting How Long a Case Will Take to Complete

You can use case prediction to see all the completed, outstanding and predicted steps for a selected case listed in chronological order.

You can only use Case Prediction if your iProcess Administrator has enabled case prediction on the iProcess Engine and on the procedure.

Selecting a Case to Display Case Prediction

To see when a case is expected to complete, select a work item from your work queue and right click. The **Case Prediction** window is displayed.



Date/Time	Action	Step Description
07/06/2004 17:03:09	Case started by swadmin@perfecto	Case Start
07/06/2004 17:03:09	"SP1" processed to swadmin@perfecto	SP1
07/06/2004 17:03:09	"SP1" released by swadmin@perfecto	SP1
07/06/2004 17:03:09	"This is Step1" processed to swadmin@perfecto	This is Step1
07/06/2004 17:03:09	"This is Step2" processed to swadmin@perfecto	This is Step2
07/06/2004 17:03:09	"This is Step3" processed to swadmin@perfecto	This is Step3
07/06/2004 17:03:09	"This is Step4" processed to swadmin@perfecto	This is Step4
07/06/2004 17:03:09	"This is Step5" processed to swadmin@perfecto	This is Step5
07/06/2004 17:03:09	"This is Step6" processed to swadmin@perfecto	This is Step6
07/06/2004 17:03:09	"This is Step7" processed to swadmin@perfecto	This is Step7
07/06/2004 17:03:09	"This is Step8" processed to swadmin@perfecto	This is Step8
07/06/2004 17:04:00	*"This is Step1" released by swadmin@perfecto*	*This is Step1*
07/06/2004 17:04:00	*"This is Step2" released by swadmin@perfecto*	*This is Step2*
07/06/2004 17:04:00	*"This is Step3" released by swadmin@perfecto*	*This is Step3*
07/06/2004 18:03:00	*"This is Step4" released by swadmin@perfecto*	*This is Step4*
08/06/2004 17:03:00	*"This is Step5" released by swadmin@perfecto*	*This is Step5*
14/06/2004 17:03:00	*"This is Step6" released by swadmin@perfecto*	*This is Step6*
07/07/2004 17:03:00	*"This is Step7" released by swadmin@perfecto*	*This is Step7*
07/06/2005 17:03:00	*"This is Step8" released by swadmin@perfecto*	*This is Step8*
07/06/2005 17:03:00	*"CP to show all in SUB" processed to NOADDR@perfecto*	*CP to show all in SUB*
07/06/2006 17:03:00	*"CP to show all in SUB" released by NOADDR@perfecto*	*CP to show all in SUB*
07/06/2005 17:03:00	*"This is Step11" processed to swadmin@perfecto*	*This is Step11*
07/06/2005 17:04:00	*"This is Step11" released by swadmin@perfecto*	*This is Step11*
07/06/2005 17:03:00	*"This is Step16" processed to swadmin@perfecto*	*This is Step16*
07/06/2006 17:03:00	*"This is Step16" released by swadmin@perfecto*	*This is Step16*
07/06/2005 17:03:00	*"This is Step15" processed to swadmin@perfecto*	*This is Step15*

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If case prediction has not been enabled for a procedure or iProcess Engine, a **Procedure does not support prediction** message is displayed.

Understanding the Case Prediction Window

The **Case Prediction** window shows:

- completed actions (in blue). A completed action is a work item that has been opened and released.
- outstanding actions (in red). An outstanding action is a work item that has been opened and either the form is still being filled in or the work item has been kept.
- predicted actions (in green). A predicted action is a work item that has not been opened yet.

The **Case Prediction** window is divided into two parts:

- The details of the case are displayed at the top of the window. The following information is displayed:
  - **Procedure name**: The name of the procedure which generated the work item, generally supplied by the procedure definer.
  - **Case**: This consists of:
  - the unique case reference number that iProcess allocates when the case is started.
  - the short description of the particular case. The case description is generally supplied by the user who starts the case.
  - **Case Status**: This is the status that this case currently holds, for example, active or terminated.
- The audit trail for the selected case is displayed below the case details.
  - **Date/Time**: Either the date/time when this action was completed or the date/time this action is predicted to complete (depending on whether the work item is completed or outstanding/predicted).
  - **Action**: The action that has or will take place (depending on whether the work item is completed or outstanding/predicted).

Closing the Case Prediction Window

Click **Close Window** to return to your work queue.

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Chapter 5 Using Audit Trails

The Audit Trail gives you information about all cases that have been started for each procedure. Using the audit trail allows you to see how far through the procedure each case has reached, which work queue each step was sent to and who released it.

Topics

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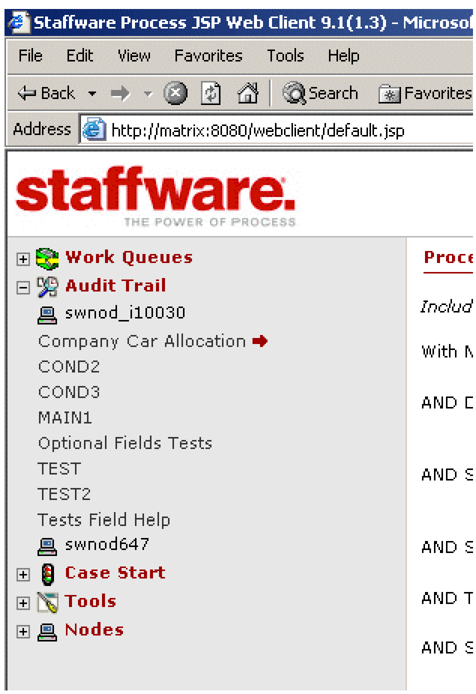
Selecting a Procedure

To select a procedure:

1. Click **Audit Trail** on the left hand side of the screen to display the list of all available procedures. If you are logged in to more than one node, each node you are logged in to is listed in the **Audit Trail** list. Click the appropriate node to display the available procedures on that node.

The first time you click **Audit Trail**, it may take a few seconds for the procedures to display. It depends on how your iProcess System Administrator has configured the TIBCO iProcess Client (JSP) and how many procedures your iProcess system has. A **Loading**... message is displayed while the procedures are being loaded.



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2. Click on the procedure that you want to see the audit trail for. Then:

   a. If no audit case list filter has been set for the procedure, the **Audit Case List Filter Criteria** window is displayed.

      Then, you can either:

   — Click **OK** to return the case list for that procedure (if the number of cases of the procedure does not exceed the maximum number of cases that can be displayed in the case list. This limit is set by the iProcess System Administrator), or

   — Define an audit case list filter. See Customizing the Audit Case List Filter Criteria View.

   b. If an audit case list filter has been set for the procedure, the list of cases that match the filter criteria are displayed.

      Then, you can either:

   — Select the case whose audit trail you want to view (see Selecting a Case), or

   — Re-define the filter criteria by clicking **Access Criteria: Filter** to display the **Audit Case List Filter Criteria** window.

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Defining an Audit Case List Filter

Setting an audit case list filter enables you to enter search criteria so that you can find a specific case or a range of cases to view. An audit case list filter enables you to find a case using any of the following search criteria:

Filter Criteria	Description
Case Number	This is the unique case number that iProcess allocates when the case is started.
Case Description	This is a short description of this particular case. The case description is generally supplied by the person who starts the case.
Started By	This tells you who started this case by giving the short Username followed by @ and the iProcess Engine on which the case was started.
Case Status	The current status of the case which can be one of the following: • ALL: Cases with a status of both LIVE and Terminated • LIVE: A case that still has steps outstanding • TERMINATED: A case that has terminated.
Start Date	Date and time when the case was started, in the format *dd/mm/yyyy hh:mm.*
Termination Date	Date and time when the case was terminated, in the format *dd/mm/yyyy hh:mm.*

To enter Audit Case List Filter Criteria:

1. In the **With Number in range between** and **and** boxes, enter a range of case numbers if you want to restrict the case list.
2. In the **AND Description of** box, enter one or more case description names to filter on.

   If you click **More**, you are able to specify multiple instances of the Case Description. This enables you to refine your search criteria to match any of up to five different Case Description strings.

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3. In the **AND Starter of** box, enter one or more addressee names to filter on.

   If you click **More**, you are able to specify multiple instances of the Case Starter. This enables you to refine your search criteria to match any of up to five different addressee strings.

4. In the **AND Started Between** box, enter a date range for when cases were started.

5. In the **AND Terminated Between** box, enter a termination date range.

6. In the **AND Status of** box, select the status of cases you want to view.

7. When you have finished defining your audit case list filter criteria, click **OK**. Then, either:

   — A list of cases that match your audit case list filter criteria is displayed, or

   — If the list of cases returned from the search exceeds the maximum audit case list limit, the **Number of items exceeds limit. Please refine you case list filter criteria** message is displayed. This means you should re-define your audit case list filter to reduce the number of cases that will be returned. Re-define the filter criteria by clicking **Access Criteria: Filter** to display the **Audit Case List Filter Criteria** window, or

   — If there are no cases that match the filter criteria, or there are no cases of a procedure, the **No audit trail entries for the selected procedure or filter criteria return no cases** message is displayed. Re-define the filter criteria by clicking **Access Criteria: Filter** to display the **Audit Case List Filter Criteria** window.

The status bar displays how many cases there are for a procedure.

To clear all fields from the Audit Case List Filter Criteria, click **Clear**.

The options you have set are applied to the case list for the current procedure. If you have applied a filter, the message Filter ON is displayed in red in the middle of the status bar.

Once you have set these options, they only apply to the current session. Once you exit the current session, the options are cleared.

Customizing the Audit Case List Filter Criteria View

You can customize the information that is displayed for each case such as who started it, the start date and the termination date.

To do this:

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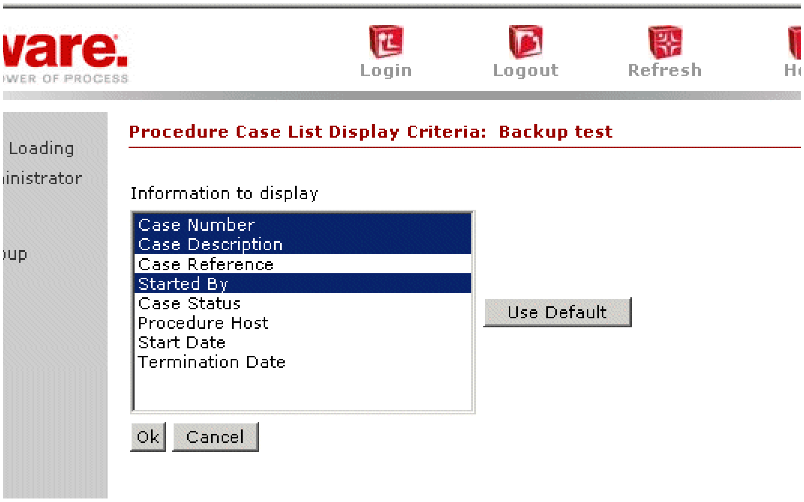
1. From the status bar, click **Access Criteria: Display**. The **Procedure Case List Display Criteria** window is displayed.



2. In the **Information to display** box, highlight the column entries you want to appear in the case list and click **OK**.

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The following table lists the display criteria that you can use in the **Procedure Case List Display Criteria** window.

Display Criteria	Description
Case Number	This is the unique case number that iProcess allocates when the case is started.
Case Description	This is a short description of this particular case. The case description is generally supplied by the person who starts the case.
Case Reference	This is allocated by iProcess. The first number refers to the procedure and the second number is the case number.
Started By	This tells you who started this case by giving the short Username followed by @ and the iProcess Engine on which the case was started.
Case Status	The current status of the case which can be one of the following: • LIVE: A case that still has steps outstanding • TERMINATED: A case that has terminated.
Procedure Host	Node name of the system hosting the procedure which generated the work item.
Start Date	Date and time when the case was started, in the format *dd/mm/yyyy hh:mm.*
Termination Date	Date and time when the case was terminated, in the format *dd/mm/yyyy hh:mm.*
Procedure Version (optional)	The TIBCO iProcess Engine Version i10 introduced version control. This means that if you are logged into a TIBCO iProcess Engine Version i10, Procedure Version is included in the display criteria. This tells you the version number of the procedure which generated the case.

To cancel the display criteria, click **Cancel**.

Click **Use Default** to reset the display criteria to the default values.

The options you have set are applied to the case list for the current procedure. The message Display ON is displayed in red in the middle of the status bar.

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Once you have set these options, they only apply to the current session. Once you exit the current session, the options are cleared.

Selecting a Case

The list of cases displayed includes both active cases that are currently going through the procedure and those that have completed.

Click on the case that you want to see the audit trail for.

Sorting Cases

You can sort your Audit Trail so that the cases appear in a specified order.

Click on the column heading that you want to sort by. The list of cases will be sorted in alphabetical order if it is a text column such as **Case Description**, or in numerical order for numeric columns such as **Case Number**. Click again on the column heading for the reverse order.

The column that cases are currently sorted on is indicated by an arrow symbol in the column heading denoting ascending or descending order.

If you are logging in to a TIBCO iProcess Engine Version i10, you will have a procedure version column. You cannot sort on the procedure version column.

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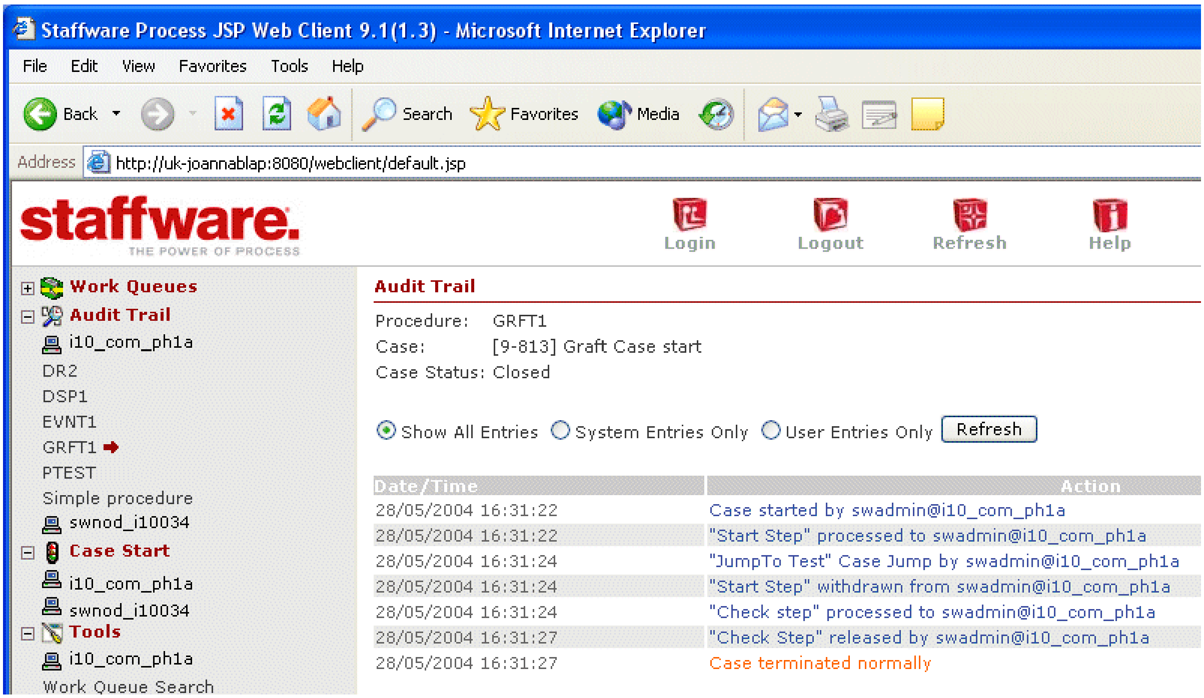
Understanding your Audit Trail

When you have selected a case, the audit trail for that case is displayed.



For the selected case, all of the steps in the procedure that have been carried out are listed in chronological order. The display gives the following information:

- **Date/Time**: The date and time when this action was carried out.
- **Action**: The action that has taken place.

The first entry is always “Case started by...”. Subsequent entries give the step name followed by the action, followed by the user or group name to whom the step was sent or who actioned it, together with the name of the iProcess Engine where that user or group is registered.

If you are logged into a TIBCO iProcess Engine Version i10, then the entries give the step description rather than the step name.

Actions include “Processed to”, “Released by”, “Forwarded to” and “Resent to”.

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Sub-procedures can be expanded to show each of the sub-procedure steps by clicking the arrow icon or the red text. Click the arrow icon or red text again to collapse the sub-procedure list.

Date/Time	Action
28/05/2004 16:30:40	Case started by swadmin@i10_com_ph1a
28/05/2004 16:30:40	"Start Step" processed to swadmin@i10_com_ph1a
28/05/2004 16:30:42	"Start Step" released by swadmin@i10_com_ph1a
28/05/2004 16:30:42	Sub-Case started from "DSP1"
28/05/2004 16:30:42	"0" Sub-Case started (using array element 0)
28/05/2004 16:30:42	"SB1 Step 1" processed to swadmin@i10_com_p
28/05/2004 16:31:00	Deadline for "SB1 Step 1" expired for swadmin@
28/05/2004 16:31:00	"SB1 Step 1" withdrawn from swadmin@i10_com
28/05/2004 16:31:00	Case terminated normally

When a case has completed, the final entry will be “Case terminated normally”. In some instances a case may have been terminated early by the iProcess Administrator. When this has occurred, the entry will read “Case terminated prematurely by ...” and give the user name.

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Filtering Audit Trail Entries

You can set up a filter so that you only display the audit trail entries you want to see.

Audit Trail

Procedure: EVNT1
Case: [13-825] Event Case start
Case Status: Closed

Show All Entries System Entries Only User Entries Only Refresh

Date/Time	Action
28/05/2004 16:31:29	Case started by swadmin@i10_com_ph1a
28/05/2004 16:31:29	"Start Step" processed to swadmin@i10_com_ph1a
28/05/2004 16:31:31	"Start Step" released by swadmin@i10_com_ph1a
28/05/2004 16:31:31	"Event Step" processed to [EVENT]
28/05/2004 16:31:35	"EVNT1" event issued by swadmin@i10_com_ph1a
28/05/2004 16:31:35	"Check Step" processed to swadmin@i10_com_ph1a
28/05/2004 16:31:37	"Check Step" released by swadmin@i10_com_ph1a
28/05/2004 16:31:37	Case terminated normally

The following table explains the filter options you can use.

Option	Description
Show All Entries	Default option that displays both iProcess and application defined entry types.
System Entries Only	Includes only the audit trail entries for the standard iProcess system types. For example, system entries include actions like “Processed to”, “Released by”, “Forwarded to” and “Resent to”.
User Entries Only	Includes only the custom application-defined entries. For example, custom application-defined entries are entries that have been defined by your system administrator like “Approved by” or “Rejected by”.

To use the audit trail filter, select your filter option and click **Refresh**.

The audit trail window is refreshed and displays only the audit trail entries you have specified in your filter.

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Chapter 6 Starting Cases

This chapter explains how to start cases of a procedure.

Topics

Selecting a Procedure

To select a procedure:

1. Click **Case Start** on the left hand side of the screen.

   The first time you click **Case Start**, it may take a few seconds for the procedures to display. It depends on how your iProcess System Administrator has configured the TIBCO iProcess Client (JSP) and how many procedures your iProcess system has. A **Loading**... message is displayed while the procedures are being loaded.

   If you are logged in to more than one node, each node you are logged in to is listed in the **Case Start** list. Click the appropriate node.

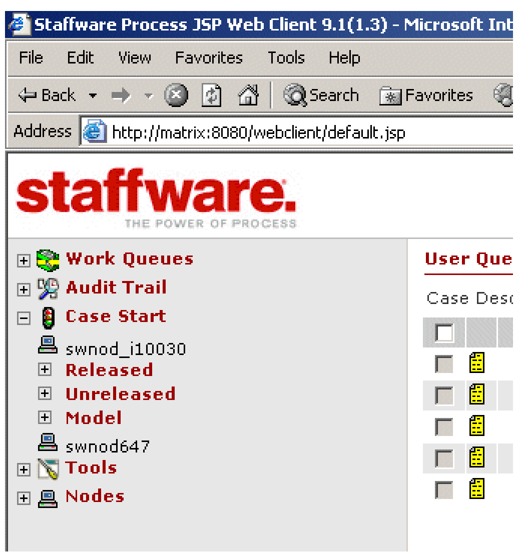
2. Depending on your iProcess Engine version and the current status of your existing procedures, some or all of the following folders are displayed:

   — **Released**

   — **Unreleased**

   — **Model**.

   Procedures are contained in these lists, depending on their status.



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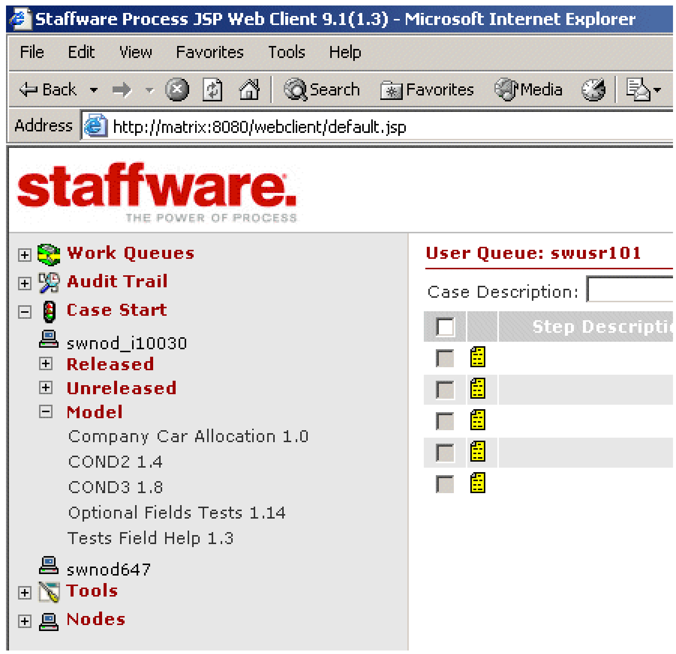
3. Click **Released**, **Unreleased** or **Model**, depending on your requirements. The list of available procedures is displayed.

If you are logged into a TIBCO iProcess Engine Version i10, the procedure version is also displayed.



4. Click the procedure you want to start a case of.

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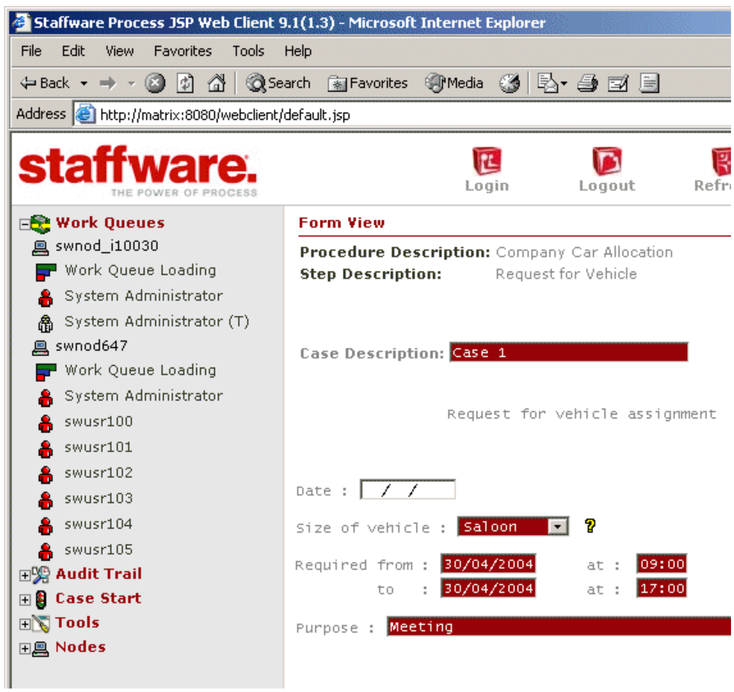
Entering a Case Description

When you have selected the procedure, you are usually prompted to enter a case description.

The case description can be up to 24 characters and can include spaces. Depending on how the Procedure Definer has written the procedure, the case description may be **required** in which case you must enter a description to be able to continue; or it may be **optional** in which case you can proceed without entering a description. In some instances you may not be able to enter a case description at all.

If the form is displayed as well as the case description (as shown below), complete the form and then either keep or release it. See Filling in Forms for detailed information.



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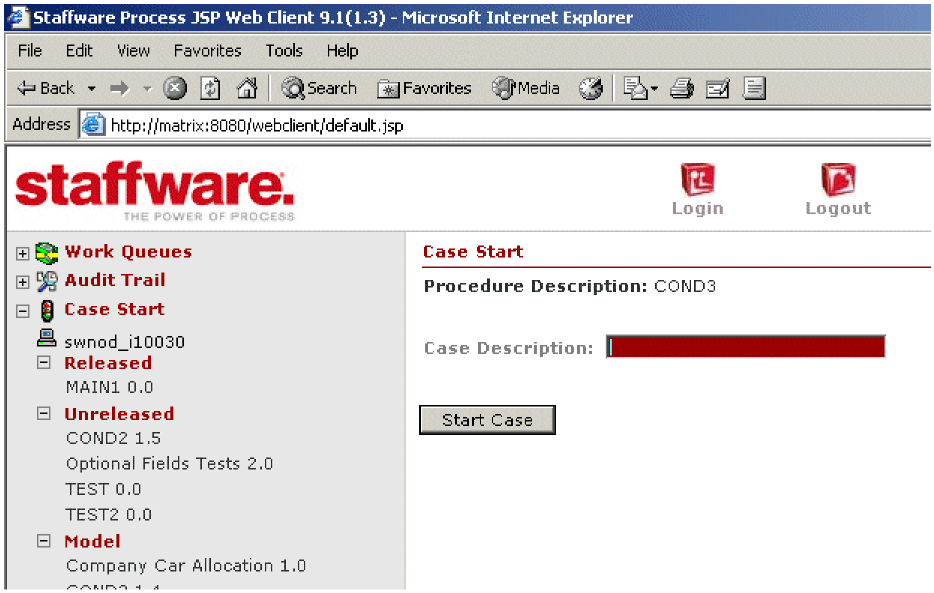
In some instances the form will not appear. This means that the first step of the procedure is addressed to a specific user or group and it appears in their work queue. In this situation, enter the case description and click **Start Case** (as shown below). You are informed if the case start has been successful.



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Chapter 7 Organizing Your Work Items

This chapter explains how you can organize and search your work queues so that you can easily find the information you need when you need it.

Topics

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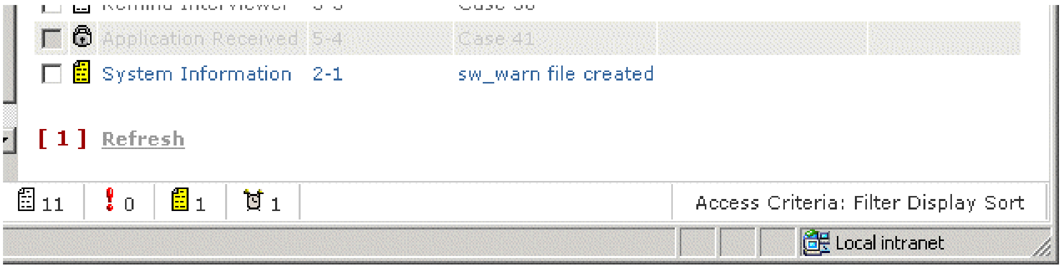
Setting Filter, Display and Sort Options

A default set of filter, display and sort options are defined on the iProcess Engine. These defaults control the way your queues are displayed in the TIBCO iProcess Client (JSP). If these defaults do not suit you, you can customize them for individual queues. The filter, display and sort options are available from the status bar.



To set the filter, display and sort options for a work queue:

Click:

- **Filter** to control which work items are displayed.
- **Display** to define which columns of information are displayed about each work item.
- **Sort** to define the order in which work items are displayed.

Use the Filter, Display and Sort options to customize your individual queues to suit your working practices and personal preferences. For example, show only urgent work items in order of priority.

Setting Filter Options

To set the filter options for a work queue:

1. Select the work queue whose filter options you want to set.

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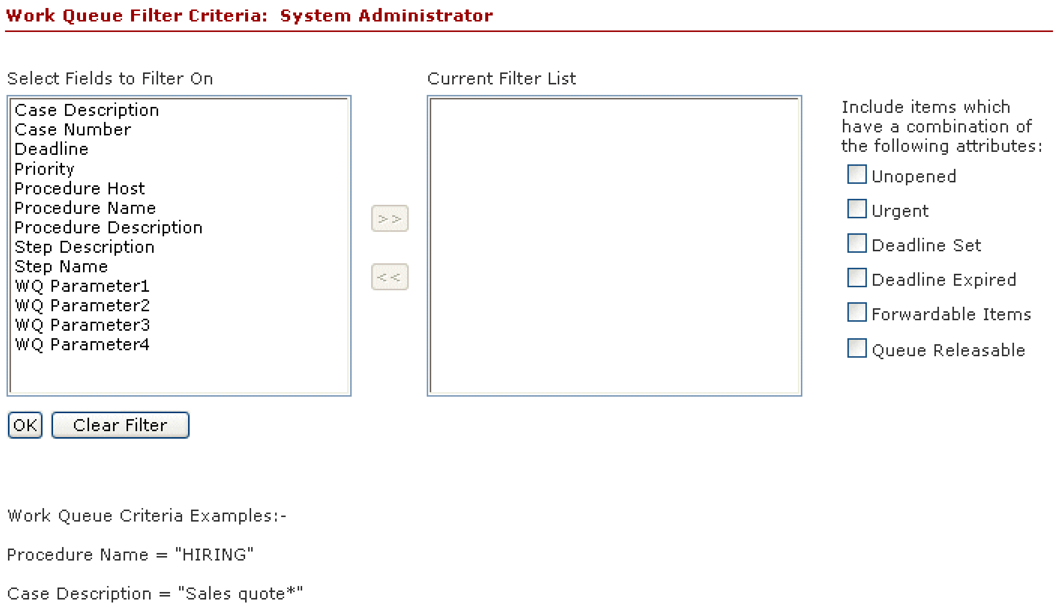
2. From the Status Bar, click **Filter**. The Work Queue Criteria for the currently selected queue is displayed.



3. From the **Select Fields to Filter On** list, select each field you want to filter on. You can select as many fields as you need.

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The following table lists the filter criteria that you can use in the **Work Queue Filter Criteria** window.

Filter Criteria	Description
Case Description	Text describing the case (up to 24 characters).
Case Number	The case number of the current case, allocated sequentially by iProcess.
Deadline	Date and/or time when the deadline on the work item expires (if one is set), in the format *dd/mm/yyyy hh:mm*.
Priority	Priority value of the work item.
Procedure Host	Node name of the system hosting the procedure which generated the work item.
Procedure Name	Name of the procedure which generated the work item, supplied by the procedure definer.
Procedure Description	Description of the procedure which generated the work item, supplied by the procedure definer.
Step Description	Description of the form which is displayed when the work item is opened, supplied by the procedure definer.
Step Name	Name of the form which is displayed when the work item is opened, supplied by the procedure definer.
WQ Parameter*n*	Work queue field. See Using Queue-Specific Data to Organize or Search Your Work Items Lists.
Case Data Queue Parameters	Items containing queue-specific data, as defined by the iProcess administrator. See Using Queue-Specific Data to Organize or Search Your Work Items Lists.

4. Click the arrow button (or double-click a field in the **Select Fields to Filter On** list). The **Select Work Item Filter Criteria:** window is displayed, which allows

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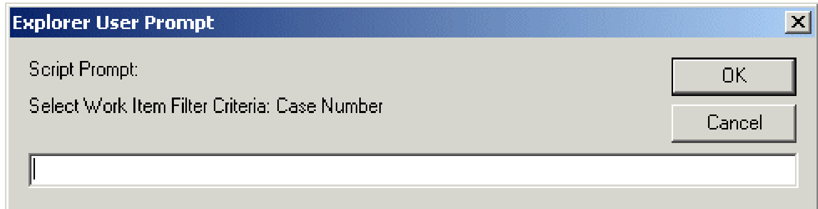
you to define the filter criteria to use for this field. If you have selected multiple fields, this window is displayed for each field in turn.



Enter your filter criteria for this field. The following table lists the filter criteria you can use in the **Select Work Item Filter Criteria for:** ***Name*** window.

Strings must be included in quotes, for example **"Case"**.

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Filter Criteria	Description	Example
*	Matches zero or more of any characters at the position included.	**"Case *"** entered in the **Select Work Item Filter Criteria for: Case Description** dialog, displays all cases whose Case Description begins with **Case**.
<, >	Matches any numbers greater or less than the number specified.	**> 290** entered in the **Select Work Item Filter Criteria for: Case Number** dialog, displays all cases whose case number is greater than 290.
?	Matches any one character at the position included.	**"Case?"** entered in the **Select Work Item Filter Criteria for: Case Description** dialog displays all cases whose case description begins **Case*n***.

Once you have defined your filter criteria, click **OK**. The field or fields are then moved to the **Current Filter List**.

5. Select any combination of the work item attributes to filter the work items based on their status or deadline information. A tick in the box denotes that the attribute is selected.

The following table lists the attributes that you can select. (See What is Displayed in Your Work Queue Loading Chart? for more information about work item status.)

Attribute	Description
Unopened	Use these criteria to sort work items by their status. **Note: Queue releasable work items are work items which can be directly released from the queue without opening them first. You can only use this facility in the TIBCO iProcess Workspace (Windows). However, although this facility is not available in the TIBCO iProcess Client (JSP), you can still use queue releasable work items as filter criteria.**
Urgent	
Forwardable	
Queue Releasable	
Deadline Set	Use these criteria to filter work items according to whether or not they have deadlines. (Use ***Deadline*** as well to sort items within these categories.)
Deadline Expired	

6. When you have finished defining your work queue filter criteria, click **OK**.

To clear all the fields from the **Current Filter List** and deselect the attribute check boxes, click **Clear Filter**.

The options you have set are applied to the current queue. If you have applied a filter the message Filter ON is displayed in red in the middle of the status bar.

Once you have set these options, they are saved for the current session and when you exit from iProcess. They are used when you next log in and open the queue, either from the same or from a different workstation.

Setting Display Options

To set the display options for a work queue:

1. Select the work queue whose display options you want to set.

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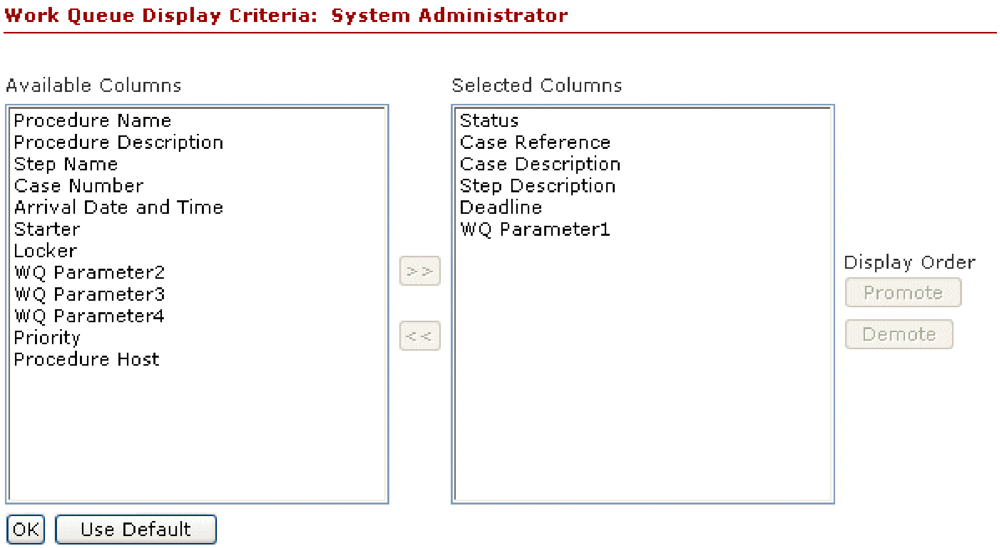
2. From the Status Bar, click **Display**. The Work Queue Display Criteria for the currently selected queue is displayed.



3. From the **Available Columns** list, select each field you want to display. You can select as many fields as you need.

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The following table lists the display criteria that you can use in the **Work Queue Display Criteria** window.

Display Criteria	Description
Status	Work item status. See The Status Bar for more information about work item status.
Procedure Name	Name of the procedure which generated the work item, supplied by the procedure definer.
Procedure Description	Description of the procedure which generated the work item, supplied by the procedure definer.
Procedure Host	Node name of the system hosting the procedure which generated the work item.
Step Name	Name of the form which is displayed when the work item is opened, supplied by the procedure definer.
Step Description	Description of the form which is displayed when the work item is opened, supplied by the procedure definer.
Case Reference	The case reference number of the current case in the format x-yy, where x is the number of the procedure and yy is the number of the case.
Case Number	The case number of the current case, allocated sequentially by iProcess.
Case Description	Text describing the case (up to 24 characters).
Arrival Date and Time	Date and time when the work item arrived in the queue, in the format *dd/mm/yyyy hh:mm.*
Deadline	Date and/or time when the deadline on the work item expires (if one is set), in the format *dd/mm/yyyy hh:mm.*
Starter	User name of the person who started the case the work item belongs to.
Locker	User name of the person who currently has the work item open (displayed only if the item is currently locked. See Locked Work Items.)

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Display Criteria	Description
Priority	Priority value of the work item. See Changing the Case Priority.
WQ Parameter*n*	Work queue field. See Using Queue-Specific Data to Organize or Search Your Work Items Lists.
Case Data Queue Parameters	Items containing queue-specific data, as defined by the iProcess administrator. See Using Queue-Specific Data to Organize or Search Your Work Items Lists

4. Click the arrow button (or double-click a field in the **Available Columns** list). The field or fields are then moved to the **Selected Columns** list.
5. Click **Promote** or **Demote** to determine the left to right order of the columns displayed in the TIBCO iProcess Client (JSP). For example, the column at the top of the **Selected Columns** list is displayed first.
6. When you have finished defining your display criteria, click **OK**.

Click **Use Default** to reset the display criteria to the default values.

The options you have set are applied to the current queue. If you have set display options the message Display ON is displayed in red in the middle of the status bar.

Once you have set these options, they are saved for the current session and when you exit from iProcess. They are used when you next log in and open the queue, either from the same or from a different workstation.

Setting Sort Options

To set the sort options for a work queue:

1. Select the work queue whose sort options you want to set.

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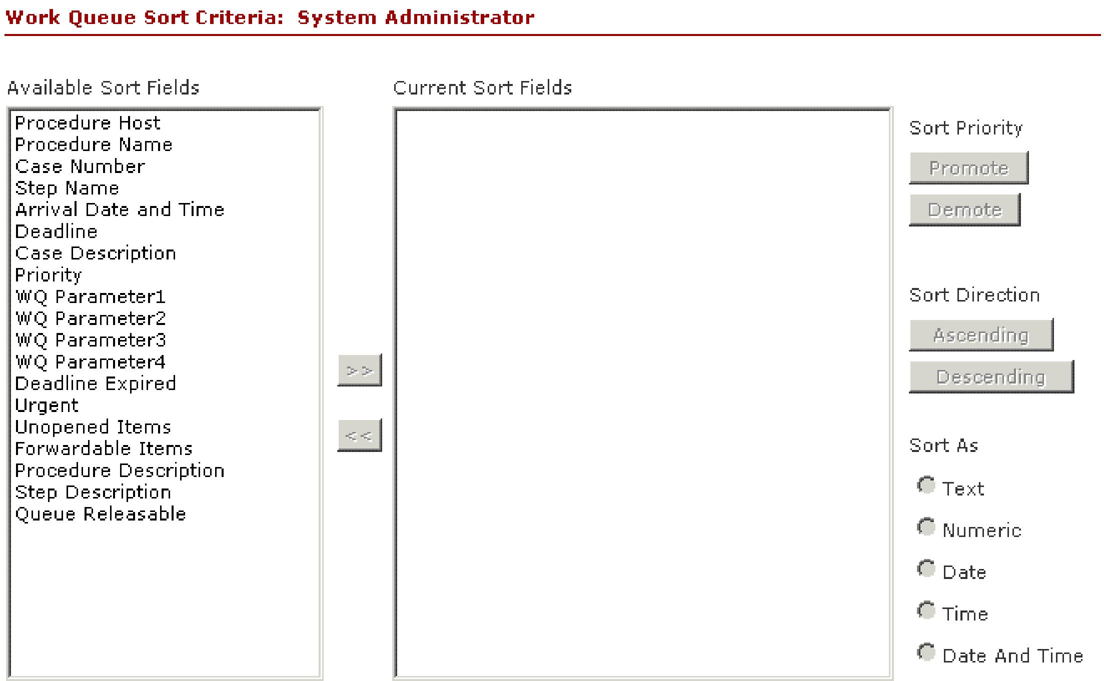
2. From the Status Bar, click **Sort**. The Work Queue Sort Criteria for the currently selected queue is displayed.



3. From the **Available Sort Fields** list, select each field you want to sort on. You can select as many fields as you need.

The following table lists the sort criteria that you can use in the **Work Queue Sort Criteria** dialog.

Sort Criteria	Description
Procedure Host	Node name of the system hosting the procedure that generated the work item.
Procedure Name	Name of the procedure that generated the work item, supplied by the procedure definer.
Case Number	The case number of the current case, allocated sequentially by iProcess.
Step Name	Name of the form that is displayed when the work item is opened, supplied by the procedure definer.
Arrival Date and Time	Date and time when the work item arrived in the queue, in the format *dd/mm/yyyy hh:mm.*
Deadline	Date and/or time when the deadline on the work item expires (if one is set), in the format *dd/mm/yyyy hh:mm.*
Case Description	Text describing the case (up to 24 characters).
WQ Parameter*n*	Work queue field.
Deadline Expired	Use this criteria to sort work items according to whether or not they have deadlines that have expired. (Use ***Deadline Date and Time*** as well to sort items within these categories.)
Urgent	Use these criteria to sort work items by their status. See What is Displayed in Your Work Queue Loading Chart? for more information about work item status.
Unopened Items	
Forwardable Items	
Queue Releasable	
Case Data Queue Parameters	Items containing queue-specific data, as defined by the iProcess administrator. See Using Queue-Specific Data to Organize or Search Your Work Items Lists.
Procedure Description	Description of the procedure that generated the work item, supplied by the procedure definer.

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Sort Criteria	Description
Step Description	Description of the form that is displayed when the work item is opened, supplied by the procedure definer.

4. Click the arrow button (or double-click a field in the **Available Sort Fields** list). The field is then moved to the **Current Sort Fields** list.
5. Click **Promote** or **Demote** to determine which order the sort fields are applied in the TIBCO iProcess Client (JSP). For example, if your sort order is **Deadline Expired**, then **Unopened Items**, the work queues are first sorted by the deadline expiry date and then by which items are unopened.
6. Click **Ascending** or **Descending** to set the sort direction for the selected item.
7. When you have finished defining your sort criteria, click **OK**.
8. Click one of the **Sort As** options to define how to sort the selected item. (This option is available for Case Description, Work Queue fields and Case Data Queue Parameters).

Click **Use Default** to reset the sort criteria to the default options. (These are defined in your SORTMAIL attribute. See "Changing a User's Attribute Values" in the *TIBCO iProcess Workspace (Windows) Manager's Guide* for more information).

The options you have set are applied to the current queue. If you have set sort options the message Sort ON is displayed in red in the middle of the status bar.

Once you have set these options, they are saved for the current session and when you exit from iProcess. They are used when you next log in and open the queue, either from the same or from a different workstation.

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Searching for Work Items

The TIBCO iProcess Client (JSP) provides two search facilities:

- You can find a specific work item from a specific work queue. See Finding Particular Work Items.
- You can find specific work items from any work queue by using **Work Queue Search**, as illustrated below:

To use **Work Queue Search**:

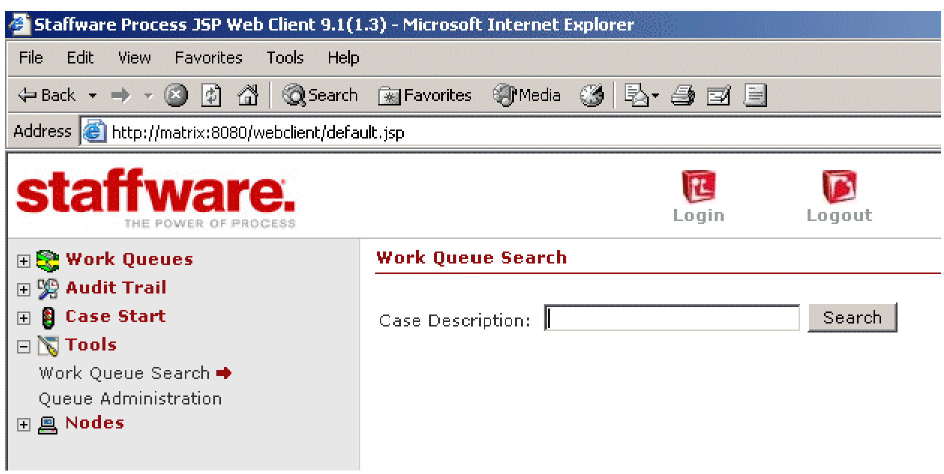
1. Click **Tools** on the left hand side of the window and the **Tools** list expands to show all available tools.

   If you are logged in to more than one node, each node you are logged in to is listed. Click the node you want to perform the Work Queue Search on.

2. Select **Work Queue Search**. The **Case Description** box is displayed in the right hand side of the window.

3. Type the characters you want to search for in the **Case Description** box.

   You can use wildcard characters in your search criteria: **?** will match *any one character* at the position it is included; * will match *zero or more of any characters* at the position it is included.



4. Click **Search** to start the search, then either:

   — The list of work items that match your search criteria is displayed, or

   — If the list of work items returned from the search exceeds the maximum work item limit, although the work item list is displayed up to the limit set by the maximum work item limit, a **Number of items exceeds limit. Please**

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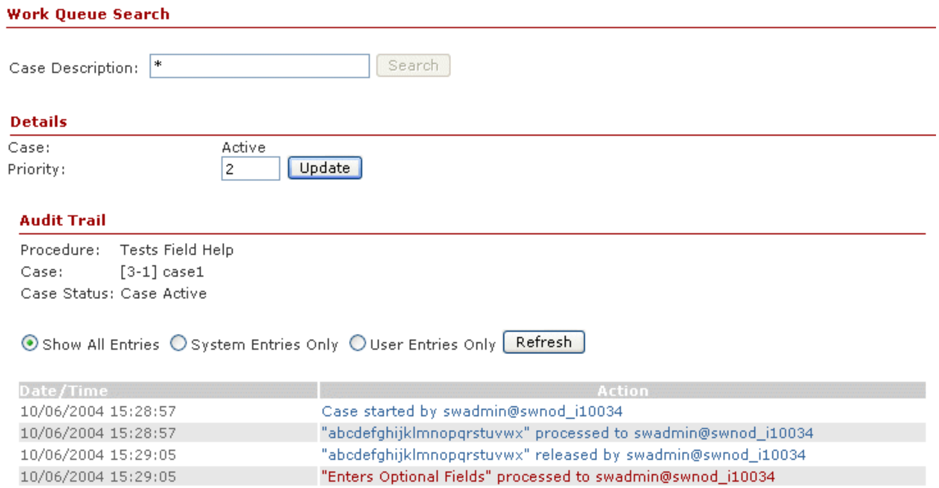
refine your case description filter criteria message is displayed. This means you should re-define your work queue search to reduce the number of work items that will be returned. Re-define the work queue search by typing the new characters you want to search for in the **Case Description** box, or

— If no matches are found, a **Work item not found!** message is displayed.

5. Click the work item whose details you want to display.



The window is divided into two parts:

- The details of the case are displayed in the top of the window. The following information is displayed:

  — **Case Status**: This is the status that this item currently holds, for example, active or terminated.

  — **Case Priority**: This is the priority level that this item currently holds.

  See Changing the Case Priority for more information about Case Priority.

- The audit trail for the selected case is displayed below the case details. The following information is displayed:

  — **Date/Time**: This is the date and time when this action was carried out.

  — **Action**: This is the action that has taken place.

See Understanding your Audit Trail for more information about audit trails.

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Changing the Case Priority

If you have a MENUNAME attribute of either ADMIN or MANAGER, you can change the priority of individual work items.

You can set user attributes in the User Manager. See “Changing a User’s Attribute Values” in the *TIBCO iProcess Workspace (Windows) Manager’s Guide* for more information.

Every work item has a priority attached to it which, when used to sort a work queue, can determine where it appears in the queue. Priority levels can change automatically according to rules decided by the person who defined the procedure. You can change the priority of a work item so that it appears above or below other items in the work queue.

Work items are given priority values when they arrive in a queue. Priority values range between 1 (the highest) and 999 (the lowest).

A work item’s priority may change over time once it has arrived in a queue. (The procedure definer determines whether or not a work item’s priority escalates in this way.)

A work item will be marked as urgent if its priority value is equal to or less than a specific value. By default this value is 10, but the iProcess administrator can change it as required for individual queues. This is useful if priorities on a particular case have changed suddenly and the work item needs to be processed faster. See “Using Work Item Priorities and Escalation” in the *TIBCO iProcess Modeler - Advanced Design* guide for more information about setting priorities.

Why Change Work Item Priority?

Listed below are some examples of why you might want to change the priority:

- **Priority Relative to Other Cases**. It may be that some cases of a procedure need to be dealt with sooner than others and should have a higher priority.
- **Priority Relative to the Life of the Case**. If you want to increase (or decrease) the priority of a case depending on how long it has been in progress.

You must include Priority as part of the Display criteria of the work queue to display priority values for work items.

Defining the Priority of a Case

To define the priority of a work item:

1. Type the new case priority in the **Priority** box.

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2. Click **Update**. If you have updated the priority a message Updated is displayed in red on the right hand side of the priority field.

Using Queue-Specific Data to Organize or Search Your Work Items Lists

There are two types of data item that you can use to organize and search your work items lists, using the **Filter, Display** and **Sort** options described in the previous sections:

- An *iProcess data item* is a piece of case data that is made available by iProcess itself, such as **Case Description** or **Procedure Name**. iProcess data items always have the same name, and are available to every queue.
- A *queue-specific data item* is a piece of case data that is defined within a specific iProcess procedure, such as **Invoice Number** or **Customer Name**. The iProcess administrator determines what items are available in what queues, and what their names are, according to the way iProcess is being used.

  iProcess provides two ways of defining and using queue-specific data:

  — *Work queue fields* are special iProcess fields that can be used to store queue-specific data, but are always available in the TIBCO iProcess Client (JSP). If the iProcess administrator has not assigned names to these fields they are shown as **WQ Parameter***n* (where *n* is 1, 2, 3 or 4).

  — *Case Data Queue Parameters* (CDQPs) are fields defined and assigned to queues by the iProcess administrator. A queue may have none of these, or many of these. (Only the first 50 CDQPs assigned to a queue are shown in the **Work Queue Display Criteria** page.)

  For example, you may want to be able to sort your work items by customer name, but also be able to search for a specific work item using its invoice number. You can do this if the iProcess administrator has made these items available to your queue, so that they appear in the relevant pages.

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Chapter 8 Managing Participation and Redirection

This chapter explains how you can grant users temporary access to another user or group queue by creating **Participant Records** that record information about which users can be participants in a queue and for what period(s).

You can also redirect all work items sent to one queue to an alternative queue. This could be useful, for example, when a member of staff goes on leave.

You must be a Queue Supervisor for a queue to change its participant records or to be able to redirect its work items. Whether you are a Queue Supervisor depends on the setting of your QSUPERVISOR attribute - see"Changing a User's Attribute Values" in the *TIBCO iProcess Workspace (Windows) Manager's Guide*.

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Topics

Adding a Participant Record

To grant a user access to another user or group queue, you must add a participant record to the queue. The participation record stores information about which users can be participants of a queue and for what period.

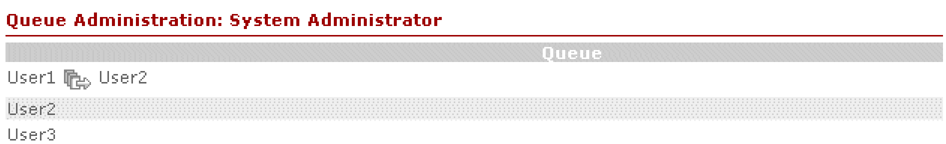
To add a participant record:

1. Click **Tools** on the left hand side of the screen and the **Tools** list expands to show all available tools.

   If you are logged in to more than one node, each node you are logged in to is listed in under **Tools**. Click the node you want to add a participant record to.

2. Select **Queue Administration**. The right hand side of the window displays a list of user and group queues that are available for participation.

   Participation may already be configured for some queues. A work queue that has participation set is shown below:



3. Click the relevant queue. The **Administering Queue:** ***username*** window is displayed.

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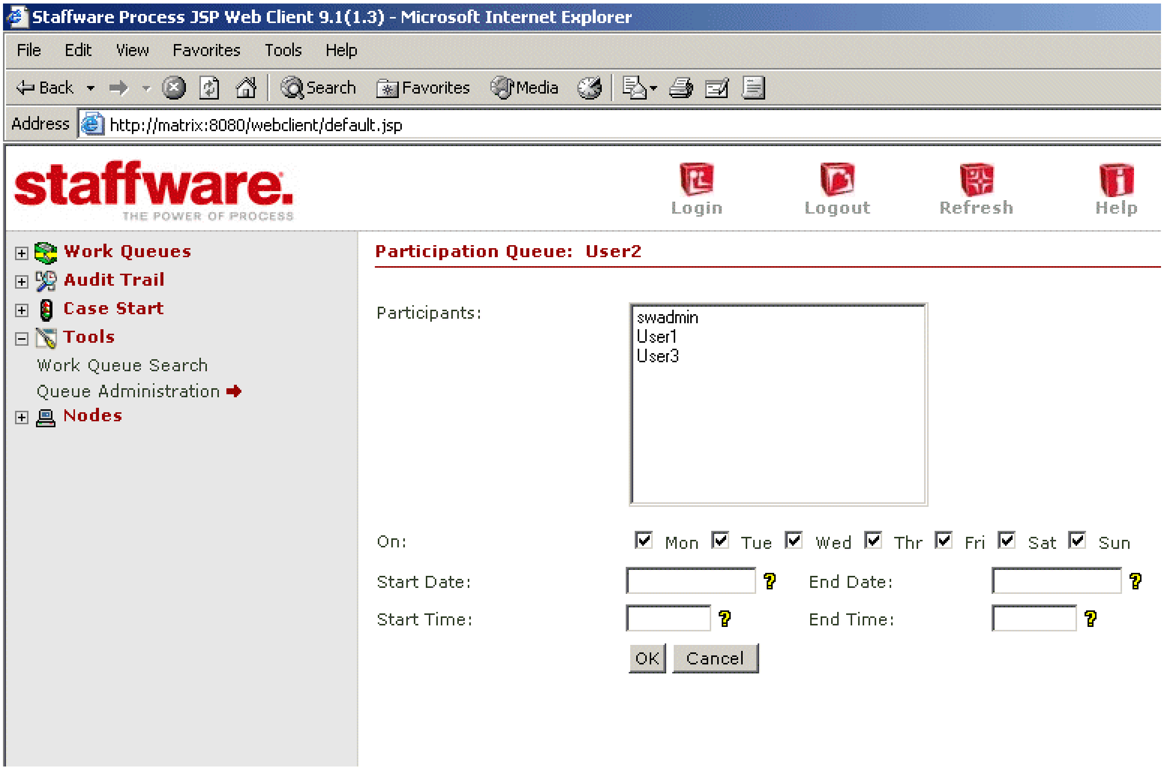
4. Click **Add Participant Record**. The following window is displayed.



5. In the **Participants** box, click the user or users you want to be participants in the queue.
6. Select the boxes for which days of the week the record should be active.
7. In the **Start Date** and **Start Time** boxes, enter the start date and time.
8. In the **End Date** and **End Time** boxes, enter the end date and time.

Start and end times apply to each individual day that participation is set. For example, setting a start time of 09:00 and an end time of 17:30 means that the participation period is between 09:00 and 17:30 for each individual day. Omitting the Time range will result in continuous participation within the date range (as long as all days are selected).

9. Click **OK** to save your changes.

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Removing a Participant Record

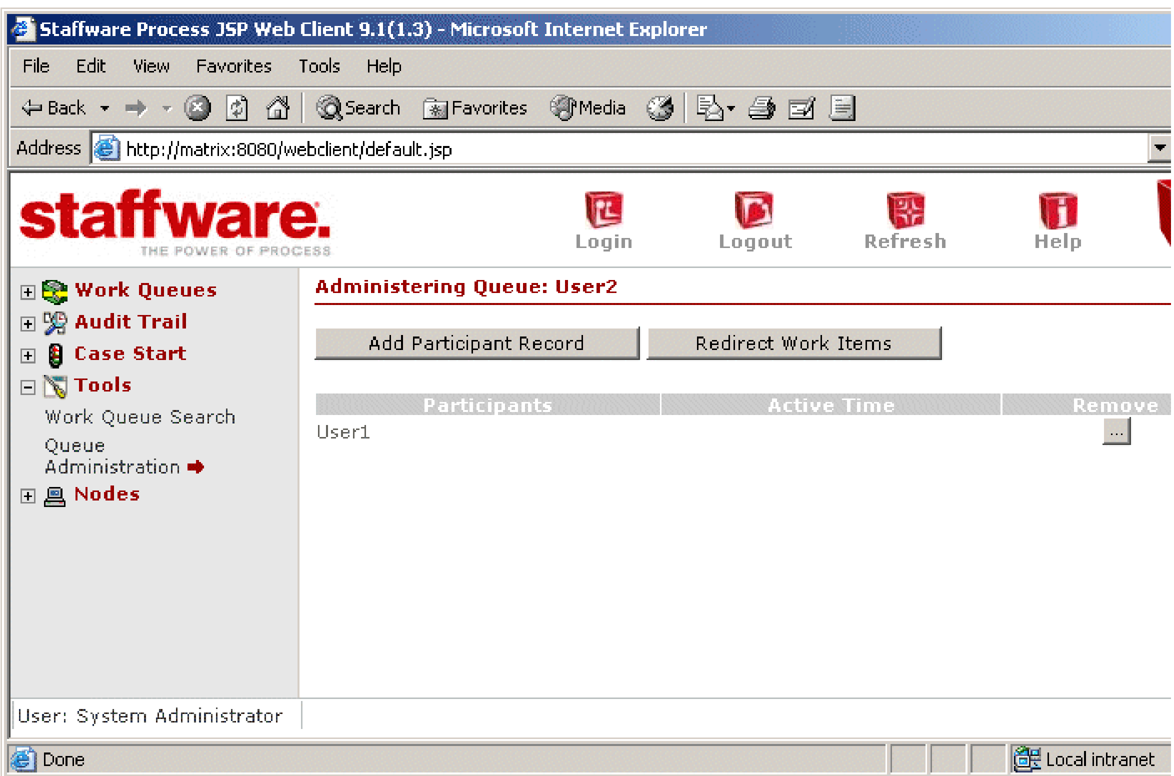
To remove a participant record:

1. Click **Tools** on the left hand side of the screen and the **Tools** list expands to show all available tools.

   If you are logged in to more than one node, each node you are logged in to is listed under **Tools**. Click the node you want to remove the participant record from.

2. Click **Queue Administration**. The right hand side of the window displays a list of user and group queues that are available for participation.

3. Click the relevant queue. The list of participants is displayed.



4. Click the **Remove** button ... next to each participant record that you want to remove.

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Participant records can only be deleted one at a time.

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Redirecting Work Items

Locked work items are not redirected.

To redirect all work items sent to one queue to an alternative queue:

1. Click **Tools** on the left hand side of the screen and the **Tools** list expands to show all available tools.

   If you are logged in to more than one node, each node you are logged in to is listed under **Tools**. Click the node which contains the work queue whose work items you want to redirect.

2. Click **Queue Administration**. The right hand side of the window displays a list of user and group queues that are available for redirection.

3. Select the relevant queue.

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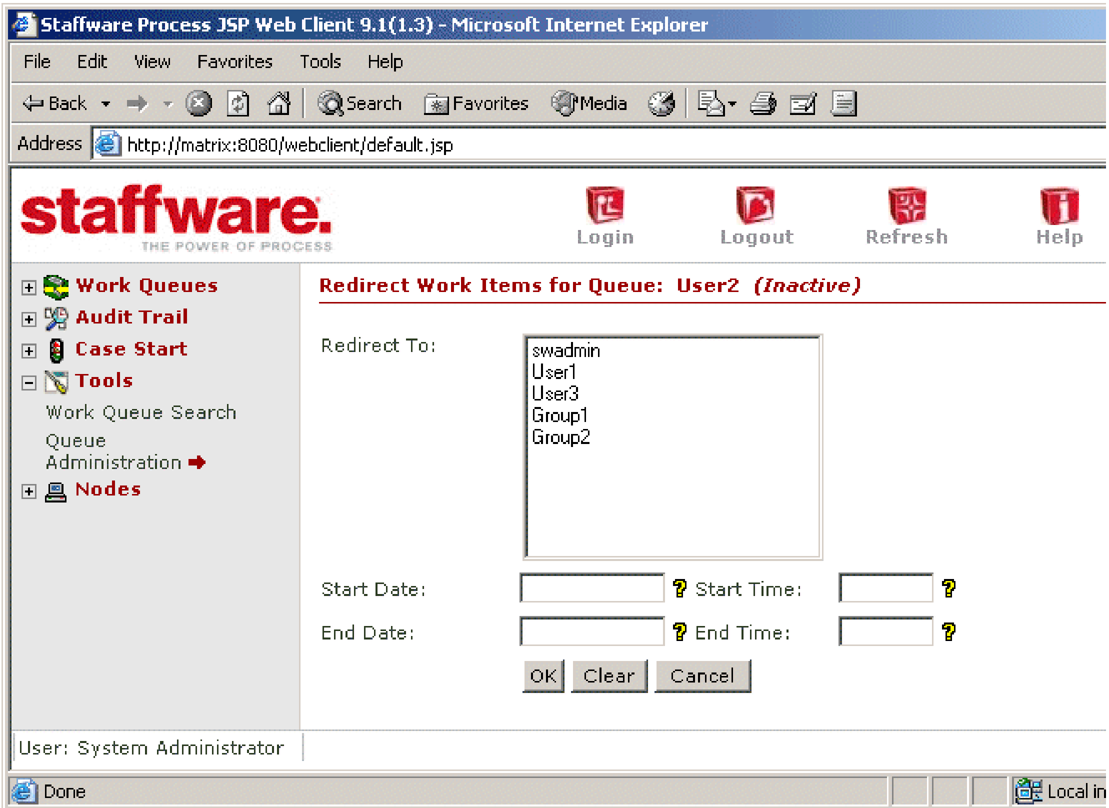
4. Click **Redirect Work Items**. The following window is displayed.



5. In the **Redirect To** box, click the name of the user or group you want to redirect the work items to.

6. In the **Start Date** and **Start Time** boxes, enter the date and time to start redirection.

7. In the **End Date** and **End Time** boxes, enter the date and time to end redirection.

The redirection period starts from the specified start date and time and is continuous until the specified end date and time.

8. Click **OK** to confirm queue redirection or **Cancel** to return to the **Administering Queue:** *username* window.

To turn off queue redirection, click **Clear**.

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