

FuegoBPM Portal Console 5 Documentation

Fuego, Inc.

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by Fuego, Inc.

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Chapter 1. FuegoBPM Basics

Business Services Orchestration

The FuegoBPM (TM) Suite embraces and extends the concept of Business Process Management (BPM) through its vision of Business Services Orchestration (BSO.)

BPM is a discipline that includes many different types of tools and methodologies. A simple process modeling tool, such as Visio, can be considered a BPM utility. Business Intelligence tools can be considered BPM utilities. True, in today's market more people are starting to see BPM as a new category of software that **automates business processes**. The problem is: what do we really understand by automating business processes?

- For the creators of BPEL, it is the organization in time of web services invocation
- For EAI fans, it is a state server that coordinates messages on a proprietary bus
- For some ERP vendors, it is the business logic embedded in an ERP system
- For traditional workflow vendors, it is the organization of the collaboration between people

FuegoBPM can be used to fit in any of the above visions, but they fall short of what FuegoBPM was meant to do.

For FuegoBPM, automating business processes consists of **managing the behavior of people, systems and organizations to orchestrate a repeatable business service**.

Therefore,

- FuegoBPM sees organizing the invocation of web services as managing the behavior of systems, and not all systems: only those exposed as web services.
- FuegoBPM sees a state server to coordinate messages as managing the behavior of systems, and not all systems: only those that have adapters into a proprietary messaging bus.
- FuegoBPM sees the business logic embedded in an ERP system as a service that manages the behavior of organizations limited by the rules in the ERP system. This service can be reused in the context of a cross application enterprise process.
- FuegoBPM sees the organization of the collaboration between people as managing the behavior of people.

Fuego's vision of BPM includes all the above visions in one single holistic vision: Business Services Orchestration. FuegoBPM sees anything a person, system or organization does within an enterprise as a **Business Service**. FuegoBPM provides all the necessary tools to **Orchestrate** composite business services using existing ones, manages and measures the service levels of those composite business services and continuously improves them.

This is what we call *Full Lifecycle Management of Orchestrated Business Services*.

To be able to do this, FuegoBPM provides the full set of tools that enables companies to:

1. Model Processes.
2. Transform Process Models into executable designs.
3. Simulate the execution of designs to study the feasibility of a service level.

4. Harmonize and catalog business services from existing systems to be able to use them regardless of what technology is used to expose them.
5. Catalog the different services from people that can be rendered by the organization and their availability in time.
6. Expose composite services that orchestrate services from systems people and organizations to be reutilized.
7. Monitor the orchestration in production according to the parameters set forth in the simulation.
8. Measure the performance of the process from a historical perspective.
9. Use statistical data to refine future simulations.

FuegoBPM can be used to manage the full spectrum of business processes, from the mostly automated (like BPEL) to the more collaborative processes like those that involve specialized workers and creative activities.

When designing with FuegoBPM, it is critical to understand that the Server was conceived to manage **behavior** rather than just to pass data. When working with a business service, the invocation of the service provokes behavior, when presenting a user with a work portal, the Work Portal suggests the adequate behavior to the user. Obviously, the user is free to do as he or she wishes, but it is very convenient not to need to remember the adequate behavior in each intervention in each process in which a user is involved. And, whatever gets done in effect by people, systems and organizations is logged into a process log that allows the tracking, tracing and measuring of performance.

Without any doubt, Business Services Orchestration is the most complete way to automate the management of a business process designed, for example, as a result of a six sigma exercise, ISO

compliance exercise or BPR exercise. Why?

Because the FuegoBPM Enterprise Server will elicit behavior that otherwise would have implied months of training and convincing, and eons of application integration.

Moreover, Business Services Orchestration is the easiest way to build composite apps that integrate existing ones and expose them as web apps or web services.

To provide the ideal Orchestration platform FuegoBPM has centralized all the design and development tools in a single environment: FuegoBPM Studio. As well the design can be previously defined in the FuegoBPM Designer and the development can be completed using the FuegoBPM Studio.

The orchestrations created in Studio run on an orchestration server that comes in two categories: Express and Enterprise.

The Express category of servers is designed for quick deployment of departmental and small business orchestrations that will require no administration or for proof of concept projects in their pre-rollout stage.

The Enterprise category of servers is designed for full featured Enterprise security, scalability and failover capabilities as well as to run inner-departmental and inter-enterprise processes.

What's FuegoBPM

FuegoBPM is a full-life cycle development and runtime environment for managing business processes from a Business Services Orchestration (BSO) perspective. This means that FuegoBPM focuses on managing the behavior of people, systems and organizations (through a process metaphor) to fulfill a measurable and repeatable business service that may span departments, divisions and company boundaries.

The full-life cycle development environment is FuegoBPM Studio.

Studio provides all the necessary functionality for a BSO approach towards BPM.

The full-life cycle runtime environment is provided through two runtime server editions:

- FuegoBPM Express - an entry level server that requires zero administration, fit for self-contained business services or for proof-of-concept projects.
- FuegoBPM Enterprise - the full fledged enterprise edition to run processes that span departments, divisions and enterprises with all the scalability, security and flexibility features you would expect from an enterprise grade product.

FuegoBPM caters to the needs of our customers in terms of TCO (Total Cost of Ownership) and ROI (Return on Investment). This is why we can really improve the way businesses run. FuegoBPM helps businesses increase operational efficiencies, reduce costs and increase profitability with an agile BPMS that can adapt to any budget and manpower. FuegoBPM allows companies to take control and tangibly optimize enterprise assets—applications, people and core business functions – and how they work together. With FuegoBPM, companies can quickly fill the gap between business strategy and execution in order to gain immediate payback.

FuegoBPM provides a BMPS software that makes the critical enterprise assets work the way you do and change as you change. By orchestrating applications, people and partners into executable, end-to-end processes that can be exposed as new composite business services, FuegoBPM fills the gap between business strategy and business execution.

FuegoBPM shields the process logic from the differences that arise from location (timezone, holidays, vacations, language), from IT infrastructure (MS, Unix, Legacy), from IT strategy (J2EE, .NET, Websphere, CORBA) and from the applications that contain reusable

services (SAP, Peoplesoft, I2, Siebel, legacy, etc.). Therefore, allowing non-specialized business analysts to model, design and change processes with no need to be domain experts.

FuegoBPM reduces complexity, enhances productivity and makes any company as competitive as its creativity allows (not limiting process automation to that which their enterprise software vendors provide.)

Chapter 2. Working with the Portal Console

FuegoBPM's Portal Console Introduction

FuegoBPM Portal Console (also known as FuegoBPM Portal Administrator), a Web application that works independently of Work Portal, is designed to give process developers and FuegoBPM system administrators the ability to customize FuegoBPM Work Portal views and functionality.

You can use the Portal Console to define preset views that determine how end users see instance, application, and attachment information. The Portal Console also allows you to customize the Work Portal actions toolbar to provide only the functionality needed by end users.

Although FuegoBPM Studio provides end users an option to generate a set of default views for each business process so that end users can individually choose how they display instances in their Work Portals, in some cases process developers and Fuego system administrators may choose to use Portal Administrator to design a predetermined custom view or set of custom views. These views can be set in Portal Administrator to override the FuegoBPM Work Portal default views.

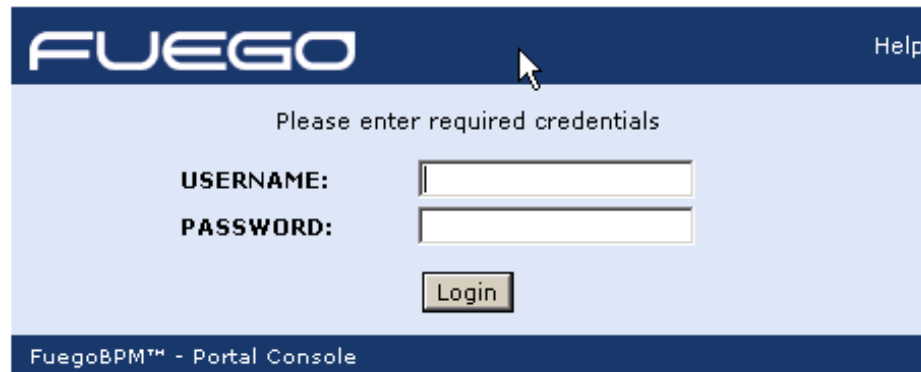
Developing custom views and presentations not only provides a more productive way to organize the work of Work Portal end users, but also allows the display of particular project and external data variable information.

Launching FuegoBPM Portal Console

The Web Application Server must be configured to start the web application on its start up. It has to be configured in the *Web*

Application Server tab of the **Configuration** option of the FuegoBPM Enterprise Administration Center. For detailed information, refer to the System Administrator Guide, chapter **Configuring FuegoBPM Enterprise/Configuring the Web Application Server**.

1. When the Web Application Server is property configured, once it has been started from the FuegoBPM Enterprise Administrator, the option **Launch FuegoBPM Portal Console** is enabled. Click this option.
2. An Internet browser opens and the login dialog is opened.

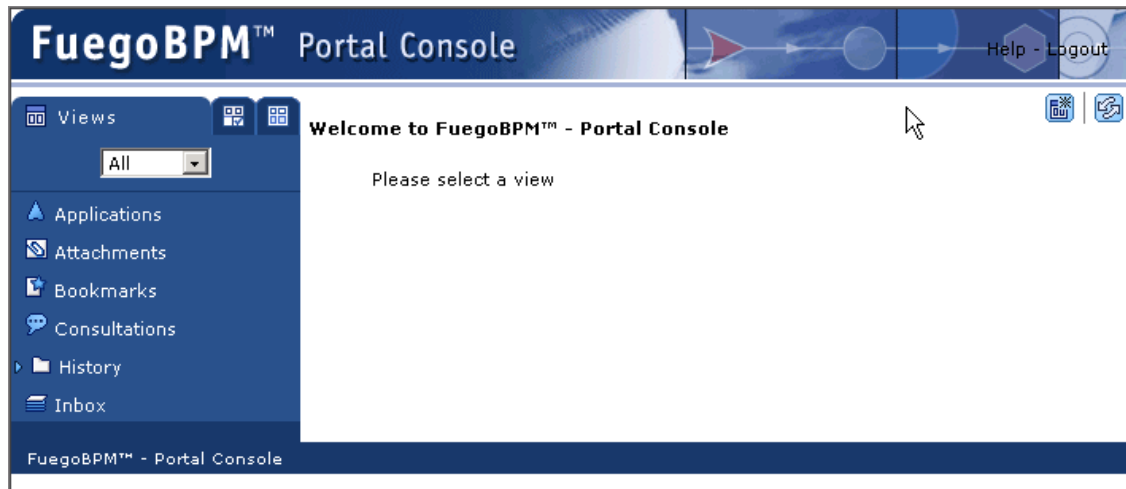


3. Write the FuegoBPM Administrator user and password and click the **Login** button.

The URL where the application resides consists of the following:

- The host name of the system where Web Application Server runs.
- The port number.
- The web application name, by default *portaladmin*.

An example of a valid URL is **`http://localhost:8585/portaladmin/servlet/controller`**.



Application Layout

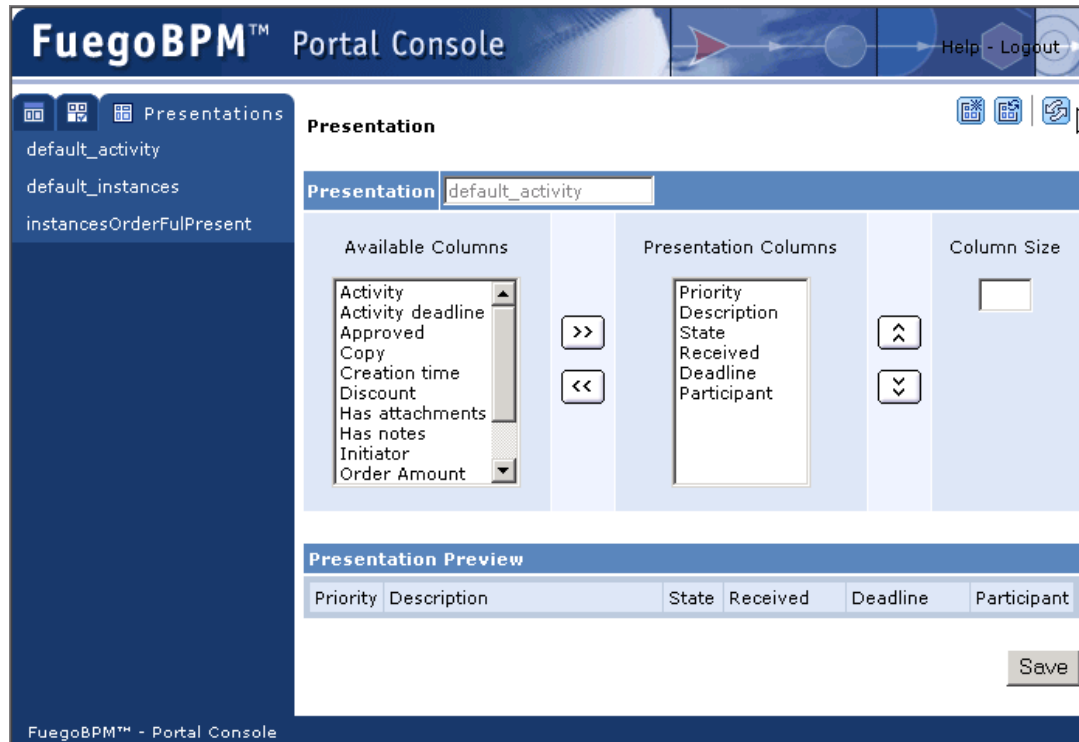
The Portal Administrator workspace displays the following tabs:

- **Views:** Click this tab to assign views to roles, to determine if a view is hidden from end users or is read-only, and to internationalize the labels of the views, choosing different descriptions for different languages. This tab also allows you to create new views.

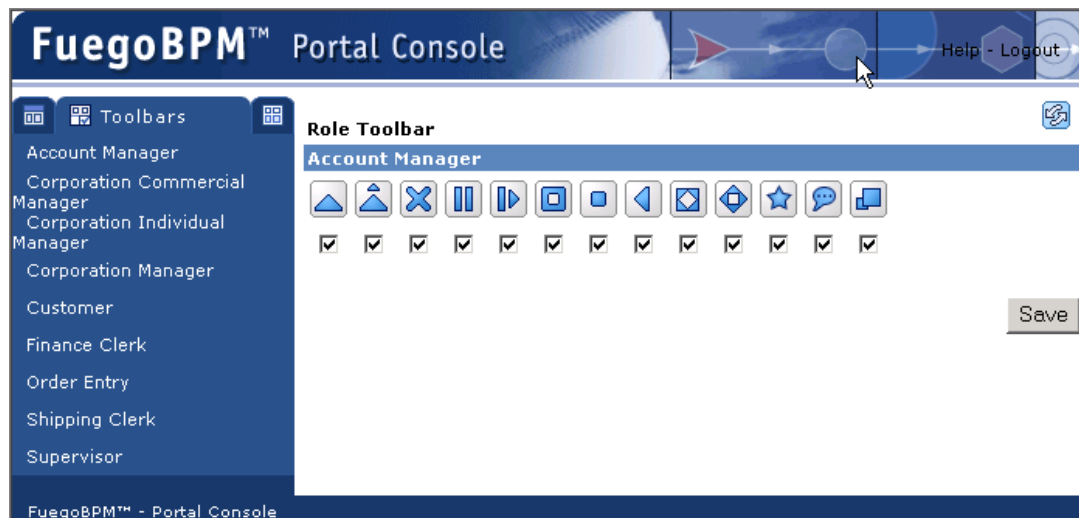
The screenshot shows the FuegoBPM Portal Console interface. The top navigation bar includes the FuegoBPM logo, 'Portal Console', and links for 'Help' and 'Logout'. The left sidebar contains a 'Views' tab and a list of menu items: Applications, Attachments, Bookmarks, Consultations, Grab Orders, History, and Inbox. The main content area is titled '> Inbox (Instances)'. It features several sections: 'Assigned Roles' with a list of roles and checkboxes; 'View Properties' with 'Is Hidden' and 'Is Read Only' options; another 'View Properties' section with a 'Label' field and a 'Language' dropdown; a 'Presentation Preview' section with a dropdown menu; a table with columns: Description, State, Received, Activity, Participant, Payment type, Order Amount, and Initiator; and a 'Processes' section with a table showing 'Marine Supply Order Fill' and 'nonParametricRoles'. At the bottom right are 'Save' and 'Clear' buttons.

When the **Views** tab is selected, a drop-down list with three options appears. Select **Custom** when you are working on custom views. The **Default** option shows the views that FuegoBPM provides by default for each deployed process only. Select **All** if you want to see all custom and default views at the same time.

- **Presentations:** Click this tab to define or modify different sets of columns that determine the layout assigned to one or more views in Portal Administrator. Every presentation determines the data that displays in Work Portal for each view.



- **Toolbars:** Click this tab to customize the actions toolbar that best fits the processing requirements of every Organizational role. This is particularly useful to limit the actions toolbar to just those actions permitted for each role.



Chapter 3. Administering Views

Views

Portal Views Administrator allows administrators to design the set of **Views** that users see in their Work Portal sessions.

A view can be designed to show information on instances, attachments, or activities corresponding to global applications.

Views are shown as a tree in both Work Portals and in Portal Views Administrator. The hierarchy of this tree can also be determined by administrators when designing views.

FuegoBPM **always** generates a set of **Default Views** for every deployed process. However, administrators can change the way users organize their work by disabling the provided default set of views and designing a new set of custom views.

View Attributes

The following table lists the attributes available in views:

Attribute	Description	View Type
Assigned Roles	The organizational roles assigned to the view. Users with roles assigned to a view can see this view in their Work Portals. The list of available roles is made up of all those included in the process or processes selected for the view in the Processes property.	All

Attribute	Description	View Type
Is Hidden	Defines if the view will be visible in Work Portals. Users can see hidden views by selecting the Show hidden views option in the Options dialog of Work Portal.	All
Is Read Only	When the view is defined as read only, the end user is not able to modify the view in Work Portal.	All
Enable Children Views	If this check box is selected when the view is saved, all of its child views are updated with the same roles assigned to the parent view.	Instances
Label	Labels may be defined for the view corresponding to the supported languages (English, Spanish, German, and Portuguese).	All
Presentation Preview	Presentation selected for the view.	Instances-Activity Instances
Processes	Processes included in the view.	All, except Folder
Activity	Activity included in the view.	Activity Instances

By combining the attributes *Is Hidden* and *Is Read Only*, the end user

has the following options:

Is Hidden	Is Read Only	End User Actions
True	True	May be visible by selecting the Show hidden views option in Work Portal Options dialog box, but the view cannot be modified.
True	False	May be visible by selecting the Show hidden views option in Work Portal Options dialog box and the view can be modified.
False	True	The view is always visible to the end user, but it cannot be modified.
False	False	The view is always visible to the end user and it can be modified.

Note



Work Portal users are not allowed to edit Activity Instances Views, whether the *Is Read Only* attribute is checked or not.

Editing a View

Default or custom views can be easily edited.

To edit a view

1. Open the Portal Administrator and select the **Views** tab.

2. Select the view to modify. Its properties appear in the right panel of Portal Administrator.
3. Make the required changes (assign a new role, add a label, change presentation, and so on). The properties to be edited depend on the type of view.
4. Click the **Save** button to save the changes.

The screenshot shows the FuegoBPM Portal Console interface. On the left is a navigation menu with options: Views, Applications, Attachments, Bookmarks, Consultations, Grab Orders, History, and Inbox. The 'Views' section is active, showing a dropdown menu with 'All' selected. The main content area is titled '>Inbox (Instances)'. It contains several sections:

- Assigned Roles**: A table with checkboxes for roles: Account Manager, Corporation Manager, Corporation Commercial Manager, Finance Clerk, Corporation Individual Manager, and Shipping Clerk. All are checked.
- View Properties**: A section with checkboxes for 'Is Hidden' (unchecked) and 'Is Read Only' (checked).
- View Properties**: A section with a 'Label' input field and a 'Language' dropdown menu set to 'English'. Below this is a table with two rows: 'Bandeja de entrada' with language 'es' and 'Inbox' with language 'en'. Each row has a minus icon in the last column.
- Presentation Preview**: A dropdown menu set to 'default_instances'. Below it is a table with headers: Description, State, Received, Activity, Participant, Payment type, Order Amount, and Initiator.
- Processes**: A table with two rows: 'Marine Supply Order Fill' and 'nonParametricRoles', both with 'usingParametricRoles' in the second column.


At the bottom right are 'Save' and 'Clear' buttons. The footer of the console reads 'FuegoBPM™ - Portal Console'.

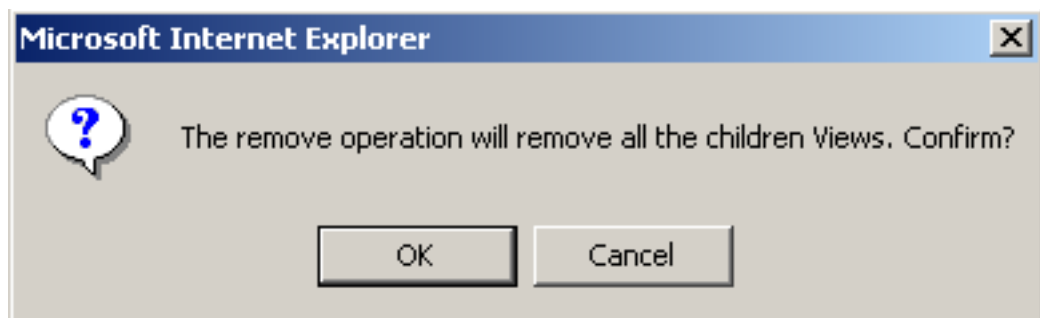
Deleting a View

Only custom views can be deleted from Portal Views Administrator. Default views cannot be deleted. When a process is undeployed, the default views for that process are automatically removed. If you are

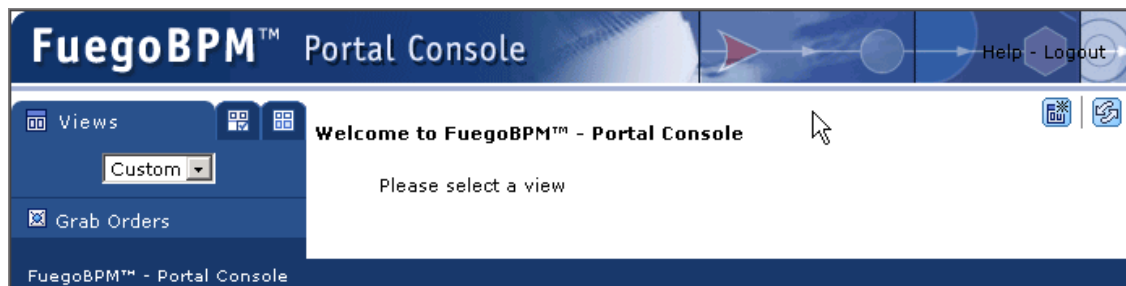
deploying your project without undeploying, then remove the view from the present application. If you need to remove a default view from Work Portals, edit the view and uncheck all the roles in the **Assigned Roles** list.

To delete a view


1. Open the Portal Administrator and select the **Views** tab.
2. To quickly find the view you want to delete, select the **Custom** option in the drop-down list at the top left of the page. Remember that default views cannot be deleted.
3. Select the view you want to delete by clicking on it in the tree.
4. Click on the delete  icon.
5. If the view has child views, a confirmation message will appear. Click **OK** to delete all of the view hierarchy.



The deleted views are removed from the custom views list.



Note

 **Important** Remember that custom views might be edited in end users' Work Portals if the **is Read Only** property is set to false. When a user changes a view defined in Portal Administrator, a copy of that view is created to make those changes available only for that user. The copied view replaces the view designed by the administrator. If the view is later deleted from Portal Administrator, the user's view will remain visible, but only for the user that created the copy.

Default views

By configuring the **Default Views generation preferences** in the **Server Preferences** window, process designers and administrators can indicate if and when default views must be generated. They can also specify the view format.

Depending on preferences values, there are different sets of Default views.

If the **Unified Inbox** option is selected, the set will consist of the following:

- The **Inbox** view: Through this view, Work Portal users can see all of the instances they have permission to access. No matter what process the instances belong to, instances are displayed under the Inbox view.
- The **Attachments** view: This view enables users with the appropriate permissions to see the attachments of all the instances for every process permitted.
- The **Applications** view: Shows all the global applications corresponding to all of the processes that the user can execute.

If the **By process** option is selected, the set of views consists of the following:

- The **Attachments** view: This view enables users to see the attachments of all the instances for every process the user has permission to access.
- For every process in the project, Work Portal generates a view named after the process ID. The generated view displays instances corresponding to that process if the process has no interactive activities.
- It also generates, under the process view, an **Applications** view for users to see the global applications of that process.

If the **By process and activity** option is selected, the following is provided:

- Work Portal generates an instances view named after the process ID for every process. Under that view, it also generates an instances view for each Interactive activity in the process, which is named after the activity ID. Each view displays only the instances located in that activity.
- An **Applications** view: This view is also generated under each process view.
- The **Attachments** view: This view enables users to see the attachments of all the instances for every process the user has permission to access.

If the **Generate Default Views** option is selected, the following is provided:

- No additional view administration is needed. Users have all the necessary views to perform the work assigned to their roles.
- The **Bookmarks** and **Consultation** default views and the

History set of default views are generated.

Bookmarks

Work Portal users can set bookmarks on instances and can see their bookmarked instances under the *Bookmarks* view, only if these instances have not reached the *End* activity. Work Portal users are not allowed to edit this view.

Consultation

When working with an instance, Work Portal users are able to make a *consultation* with other participants. All consultations received by the user are displayed in this view, and they are stored as *Notes* instances. Work Portal users are not allowed to edit this view.

History

The *History* view is a set of views that shows all instances on which the user has been working. Depending on the date and time they are processed, they are included in one of the views that are part of the set.

The *History* view set is based on *weeks*. Users always see instances they are working on from the current week back to three weeks ago (that is, the last 4 weeks). A default view is generated for each past week, and the current week is split in one view per day from the beginning of the week to the current day.

The *History* view set consists of the following:

- Today
- A view per each day that completes the current week
 - Yesterday, if the day before is included

- The name of the day for those days before yesterday
- Last week
- Two weeks ago
- Three weeks ago

The instances are included in each week view (last, two, or three weeks ago) and the views are built for each day to complete the present week according to the week definition. Week definitions depend on the set country, and its definition may be one of the following:

- From Sunday to Saturday
- From Monday to Sunday

The instances included in the History view set are the *In process* ones by default. If required, you may change this and add the *Completed* and/or *Aborted* instances by clicking their corresponding check boxes in the lower **Include Instances** section of the default History view configuration. However, it is strongly recommended that you do NOT include these two instances' status, as access to the database server must be performed in order to retrieve these instances.

The set of History views is default. They are only generated if, at deployment time, the **Generate Default Views** options is selected. Work Portal users are not allowed to edit any of these views.

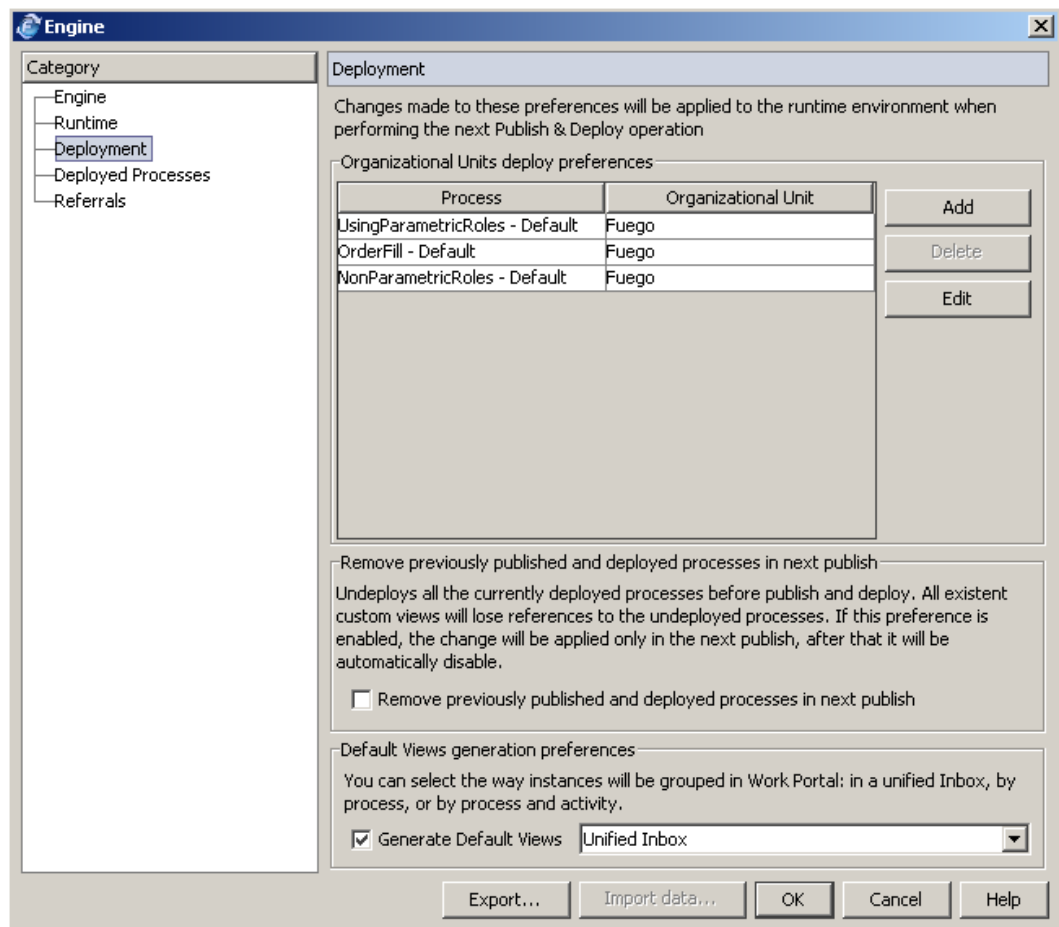
Deploying Default Views

If more than one version of the process is deployed, Portal Administrator consolidates the versions.

When a process is undeployed, the default views associated to it are automatically removed.

To make views available from FuegoBPM Studio

1. Go to **Run->Server Preferences** in FuegoBPM Studio. The Server preferences window appears.
2. Select the **Deployment** category.



3. Check the check box **Generate default views** at the bottom of the panel to generate default views.
4. Select one of the options that determine how the set of default views is composed. The next **Publish & Deploy** operation will apply changes to this property.

To make views available from FuegoBPM Enterprise

Choose between basic view configurations when deploying the project from the FuegoBPM Web Console.

The set of **Default Views** ensures that participants have all the needed views to perform the tasks defined for the roles that they are assigned.

Note



Default views contain instances assigned to the **Participant Roles** without including those assigned to other participants.

Custom views

If the default views do not meet your current needs, you can create a new view.

The complete set of available views is displayed in Work Portal and Portal Console as a tree in the application's left panel. The tree structure allows a better way to organize the views. It is possible to nest views in any number of levels. When you are creating a view, you can indicate the Parent View under which the new view will be nested.

When you are creating a new nested view, take into account that the view does not inherit properties from the parent view. There are no restrictions to relate views with different configurations. If you want to create a group of views under a compatible definition (process, conditions, external variables values, and so on), you must do so manually.

You can create views to display instances. You can also create them to display attachments or global applications of one specific process or a set of processes. Depending on the selected processes, the view has to be enabled for all the roles or for a subset of the roles included in those processes. Assigning roles to a view is how a view becomes visible for Work Portal end users with those roles.

If you need to group views with a certain criteria, or to better organize the set of views presented to Work Portal users, you can create a Folder view.

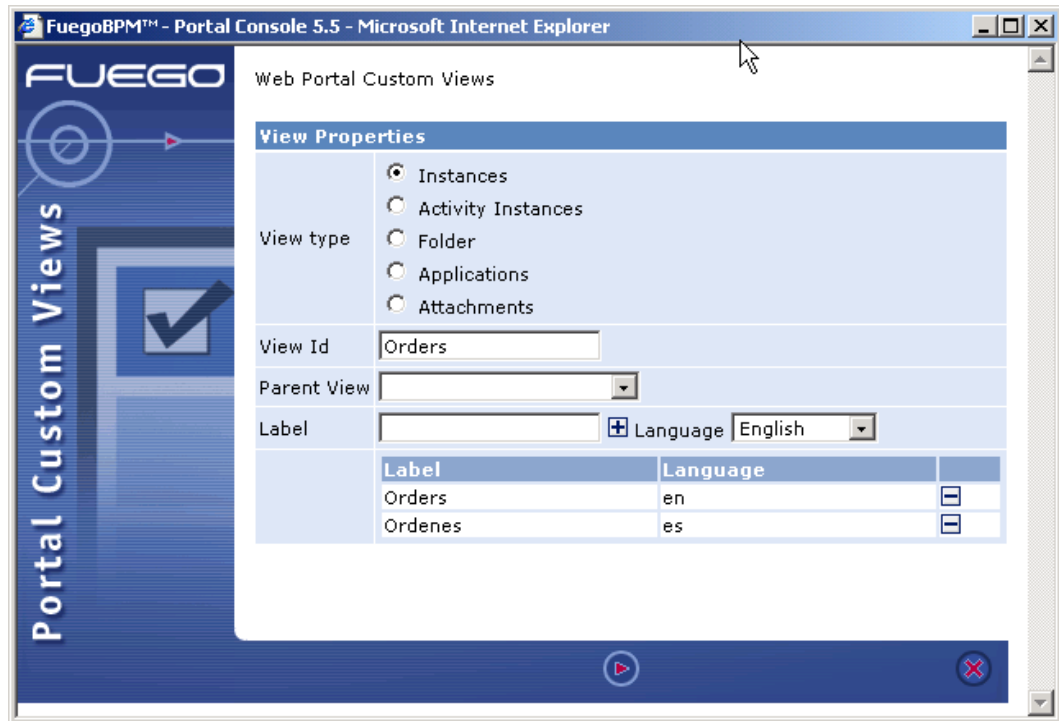
When creating instances views, even though a default presentation is provided, you can set the presentation as you like. This means that it is possible to change the set of columns or information that is presented for Work Portal users.

Finally, you can add a set of conditions to filter the instances displayed in a view according to rules. The conditions can be set not only over default information kept for instances of any process, such as deadline or the instance priority, but also over data defined as external variables when the process was designed. For example, an Order Fulfillment process might have defined the order amount as an external variable. It is possible to create a custom view that only displays instances where the order amount is greater than a certain value.

Creating a view

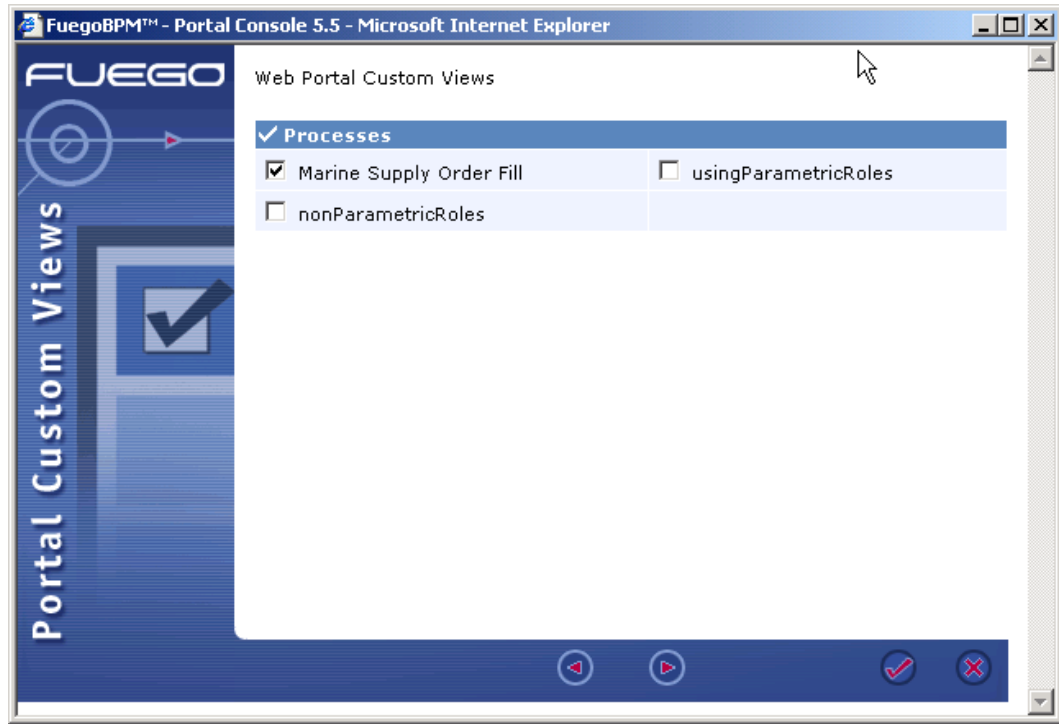
To create a view

1. Click the **Create View** icon  in the upper-right of the views workspace. The Work Portal Custom View generator wizard appears.

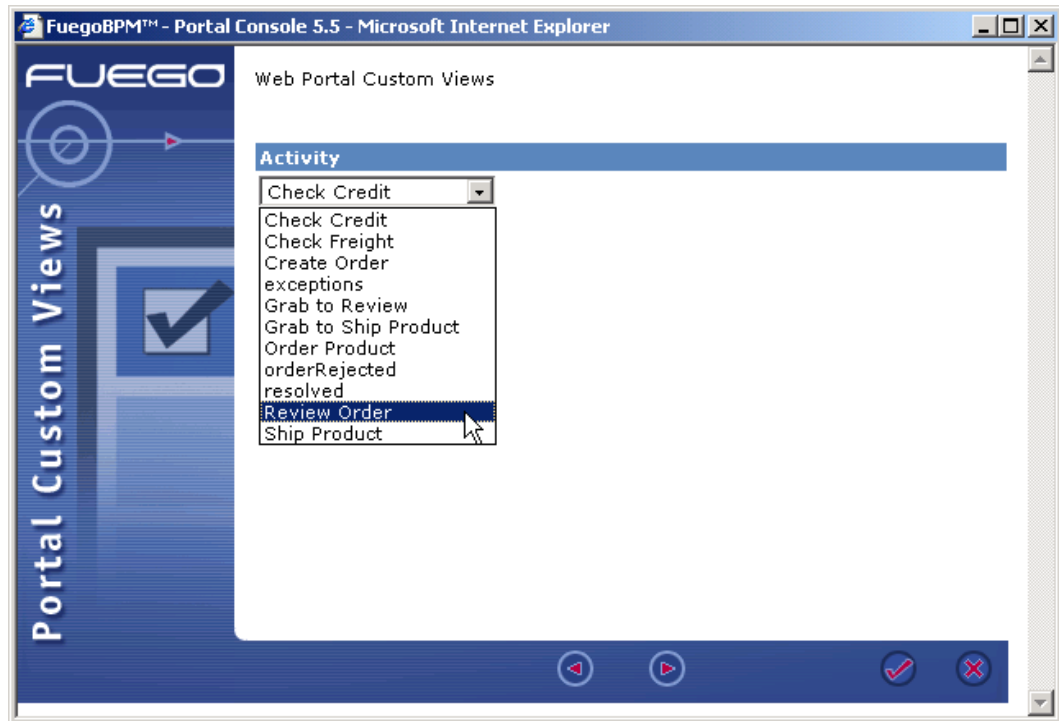


2. Select a View type.
3. Type a name for the view in the **View Id** field. Remember that some non-alphanumeric characters are not allowed (/ , \$; + ' " .).
4. Select a parent view from the **Parent View** drop-down menu. Your new view is nested under this parent view.
5. Type a name in the **Label** field for a language selection. Choose a language from the Language drop-down menu. At least one language must be defined. Once the label is entered and the language is selected, click the **Plus** icon next to the Label field. The label is added. You can repeat this step to localize the label for all the languages in the list. The label is later displayed in Work Portal in the language each user selects in his/her Work Portal options.
6. Click the **Next** icon when you are finished. The dialog box that next appears depends on your **View Type** selection. For all

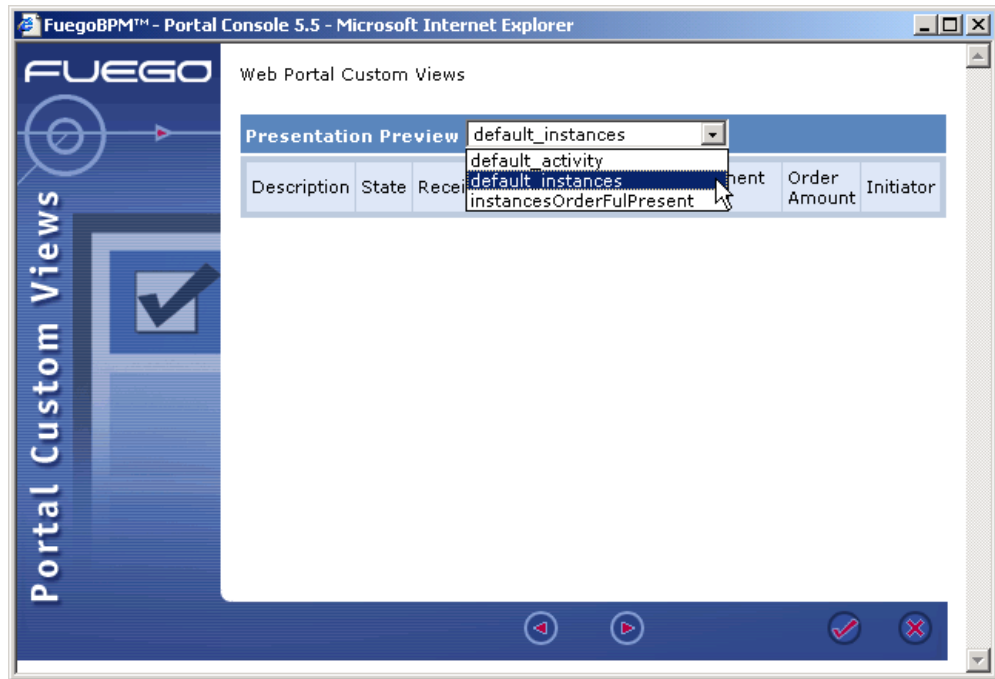
views but **Folders**, the Processes dialog box appears.



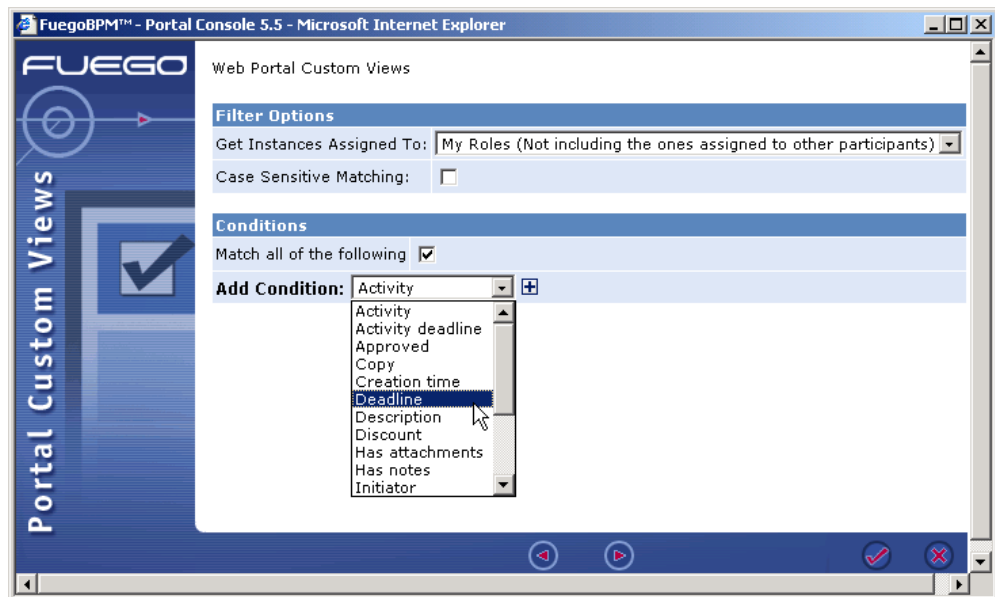
7. Select the processes that will include the new view. All deployed processes are displayed. You may only select one process if you have selected **Activity Instances** on the previous dialog box.
8. If the **Activity Instances** view type is selected, enter the activity next.



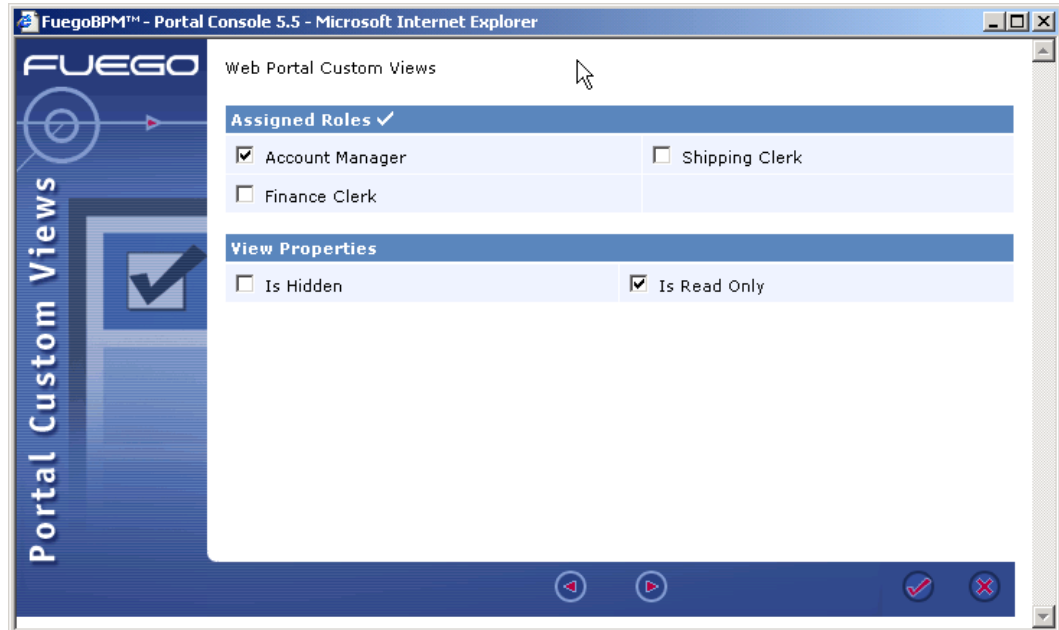
9. If the **Instances** or **Activity Instances** view type is selected, perform the appropriate step:
 - a. If the Presentation Preview dialog box is displayed, the default_activity is displayed by default because it is an Activity Instance view type. You can select an alternate choice from the Presentation Preview drop-down menu. Click the Next icon.



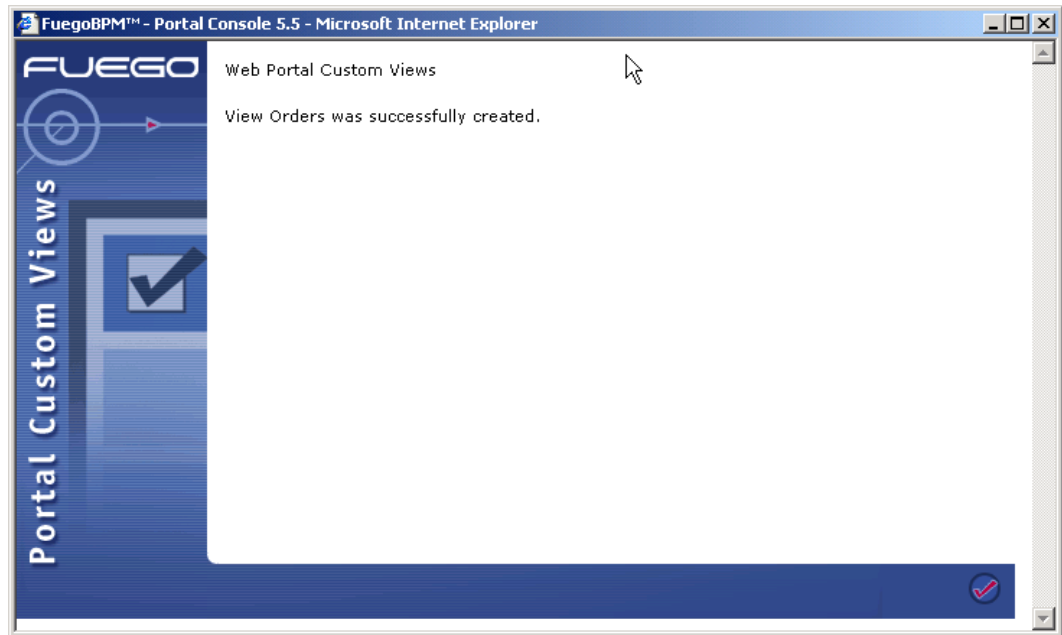
- b. If the Filter Options & Conditions dialog box is displayed, see Filter options for information on setting filters and conditions. The Filter Options and Conditions dialog box allows you to filter the instances that are shown in the view.



10. For all view types, the **Assigned Roles and View Properties** dialog box is displayed. The available roles correspond to the processes you selected on a previous dialog box. Select **Is hidden** to hide the view. Select **Is Read Only** to disable the ability to modify the view from the Work Portal. Click the **Next** icon.



11. After you finish creating a view, the following screen is displayed to indicate that the view has been successfully created.






Creating a Grab view

If you want the users to have a view for grab activities of the process. You must create a view of type *Activity Instances* for the grab activity. Custom views always appear in the Work Portal, no matter how you deployed the process views (unified box, by process, by process/activity).

Filter Options and Conditions

The Work Portal Custom Views dialog box enables you to filter the instances included in the view according to whom they are assigned.

Web Portal Custom Views

Filter Options	
Get Instances Assigned To:	All 
Case Sensitive Matching:	<div> <div>All</div> <div>Anyone in my roles</div> <div>My Roles (Not including the ones assigned to other participants)</div> <div>Me</div> </div>
Conditions	
Match all of the following	<input checked="" type="checkbox"/>
Add Condition:	Activity deadline  

Possible values for the **Get Instances Assigned To** filter are displayed in the following table:

Filter Value	Action
All	All existing instances are shown, regardless if they are assigned to any participant.
Anyone in my roles	Shows the instances assigned to participants that belong to any of the same roles of the participant logged in the Work Portal.
Me or not one person in my roles	Shows instances assigned to the participant, and in any of the participant's roles, if they are not assigned to another participant.
Me	Shows only instances assigned to the participant.

Conditions

If the **Match all of the following** check box is selected, all the conditions must be true. Otherwise, the instance is included if at least one condition is true.

The possible conditions are as follows:

- **Activity deadline:** the deadline by which the instance must complete an activity.
- **Copy:** the instance is a copy of an original instance (such as in a Split/Join circuit).
- **Deadline:** the deadline by which the activity must be completed.
- **Description:** the description of the instance. This is a predefined variable set in FuegoBPM Business Language (FBL). This field is case-sensitive if you selected the Case sensitive option.
- **Initiator:** the participant who initiates an instance. This field is case-sensitive if you selected the Case sensitive option.
- **Participant:** the participant who selects an instance. This field is case-sensitive if you selected the Case sensitive option.
- **Process Deadline:** the deadline by which the instance must finish the entire process through the End activity.
- **Priority:** the priority of the instance. This is a predefined variable set in FBL. The possible values are as follows:



The image shows a user interface element for selecting a priority. It consists of a light blue rectangular container. Inside, the word "Priority" is followed by a small white box containing the text "is" and a green downward arrow. To the right of this is another green downward arrow containing the text "Lowest". A blue minus sign icon is to the right of the "Lowest" dropdown. Below the "Lowest" dropdown, a list of five options is displayed: "Lowest", "Low", "Normal", "High", and "Highest". The "Lowest" option is highlighted with a green background.

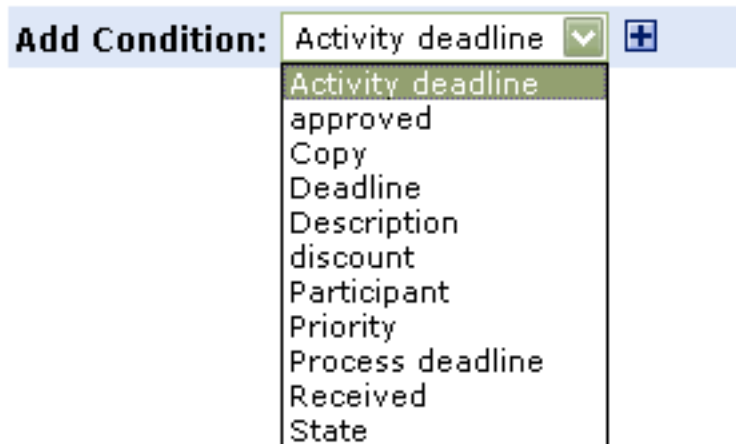
- **Received:** the time the instance is received in the activity.

- **State:** the current state of the instance. State is a predefined variable set by the FuegoBPM Server as instances are running through a process. Possible values are as follows:



The screenshot shows a web form with a label 'State' followed by a dropdown menu. The dropdown is currently open, showing a list of options: 'Aborted', 'Activity completed', 'Completed', 'Exception', 'Grabbed', 'Running', and 'Suspended'. The 'Aborted' option is highlighted. To the right of the dropdown is a small blue button with a minus sign.

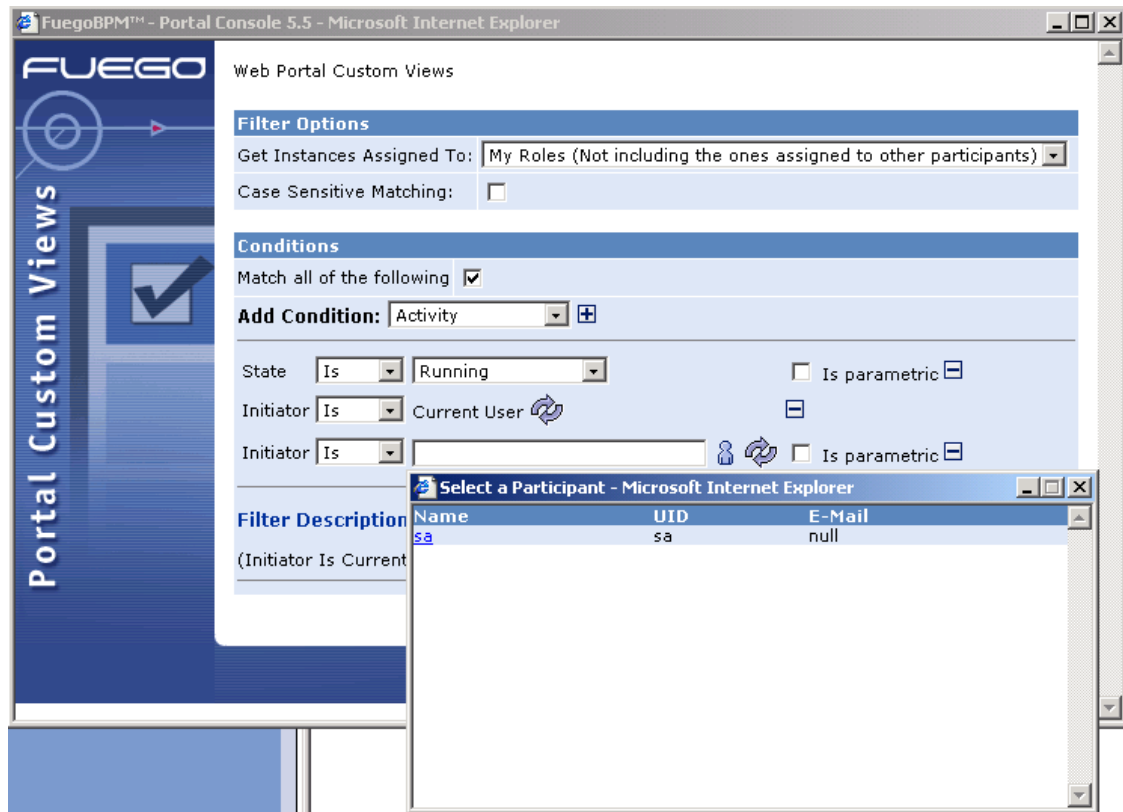
- **Activity:** the activity where the instance is. This attribute appears for use as a condition only if one process was selected in the Process step of the wizard. When this attribute is selected, the list of activities of the process appears as a list of options.
- **External Variables:** conditions can also be defined over the external variables the process designer created in the deployed processes. If case external variables exist, the **Add Condition** drop-down list includes them. In this case, approved and discount are external variables.



Parametric Conditions

When a condition on an attribute is defined, it can be set as parametric. If this is the case, Work Portal users can select the value of the attribute and, therefore, instances are included in the view.


The *Initiator* attribute is special because you can set it as the *Current User* by clicking the *Change to select User mode* icon. Therefore, it makes this condition partial parametric because you do not make the Portal user select the participant. This view will vary from user to user.



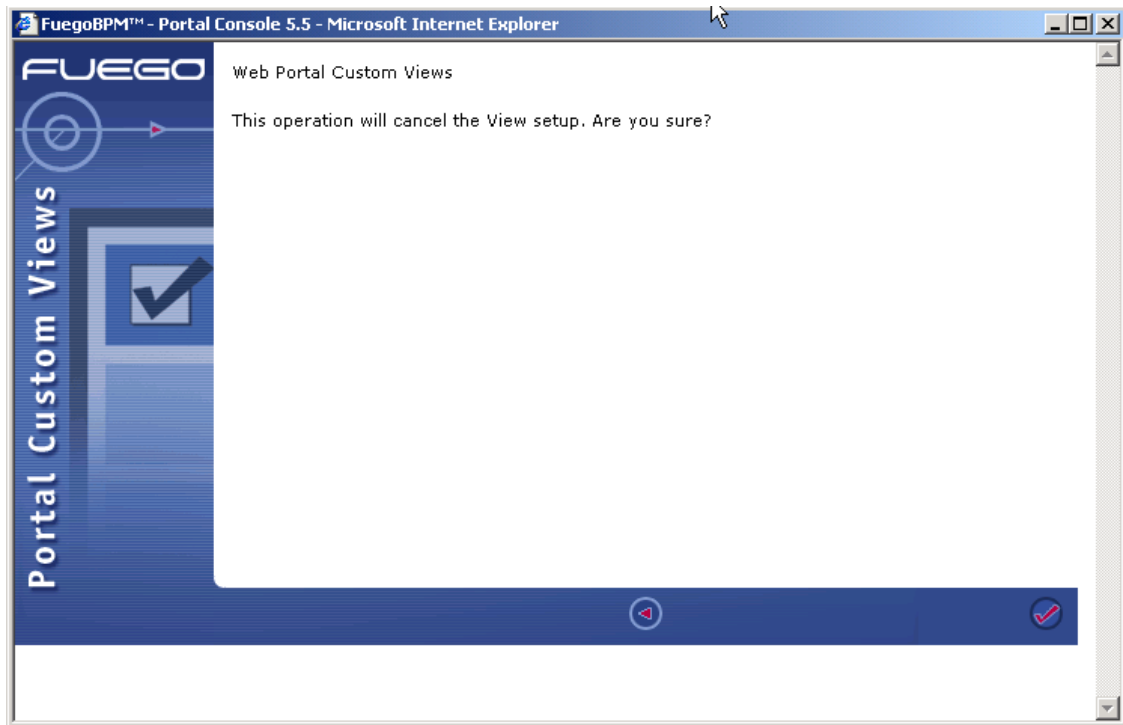
Wizard Controls

The following table lists the control buttons available during wizard use:

Action	Icon	Description
Previous		Displays the previous step in view creation.
Next		Displays the next step in view creation.
Finish		If the view type, ID, and label are defined, the view is created with default values for those attributes that have not been defined. You can

Action	Icon	Description
		click Finish at any time during view creation.
Cancel		If you cancel the wizard, the view is not created. The confirmation screen shown below this table is displayed.

The confirmation screen that is displayed when canceling the wizard is shown below:



Chapter 4. Administrating Presentations

Presentations

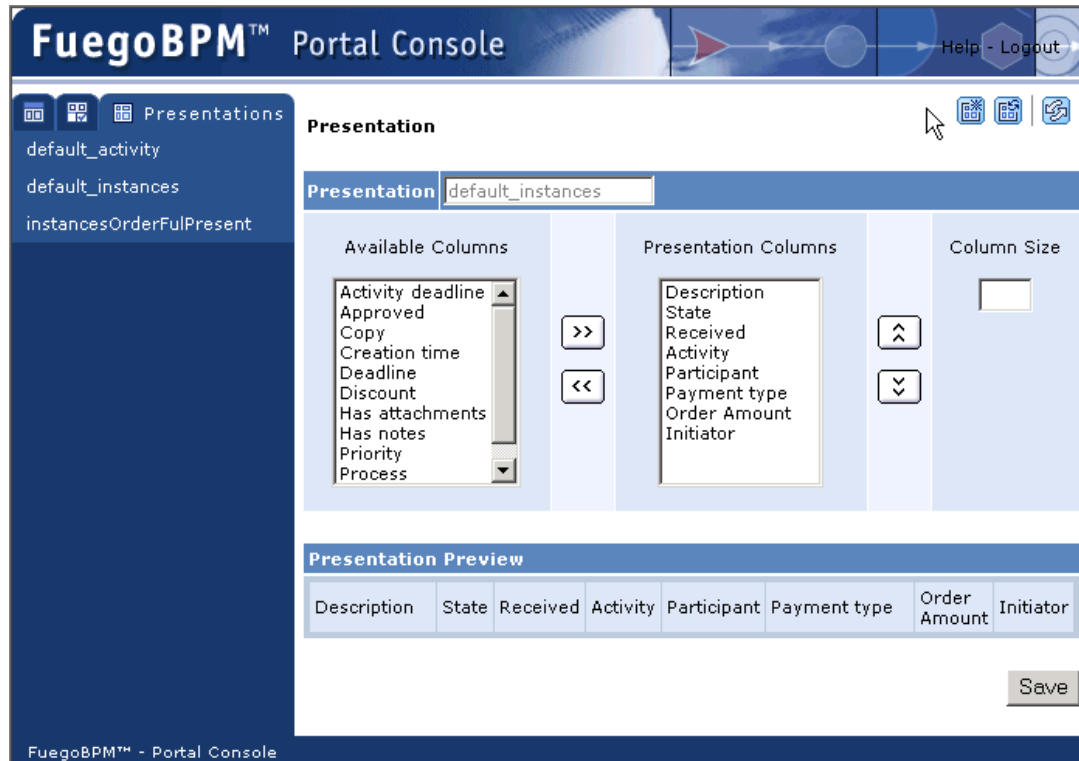
A presentation is the layout that displays an instance view. Instance views are used by Work Portal to show FuegoBPM Process Instances information. A presentation consists of a set of columns and the size of the columns.

Every column represents FuegoBPM Studio instance data needed by Work Portal users when processing instances. You can create presentations and assign them to views to vary the way instance information is displayed in a view.

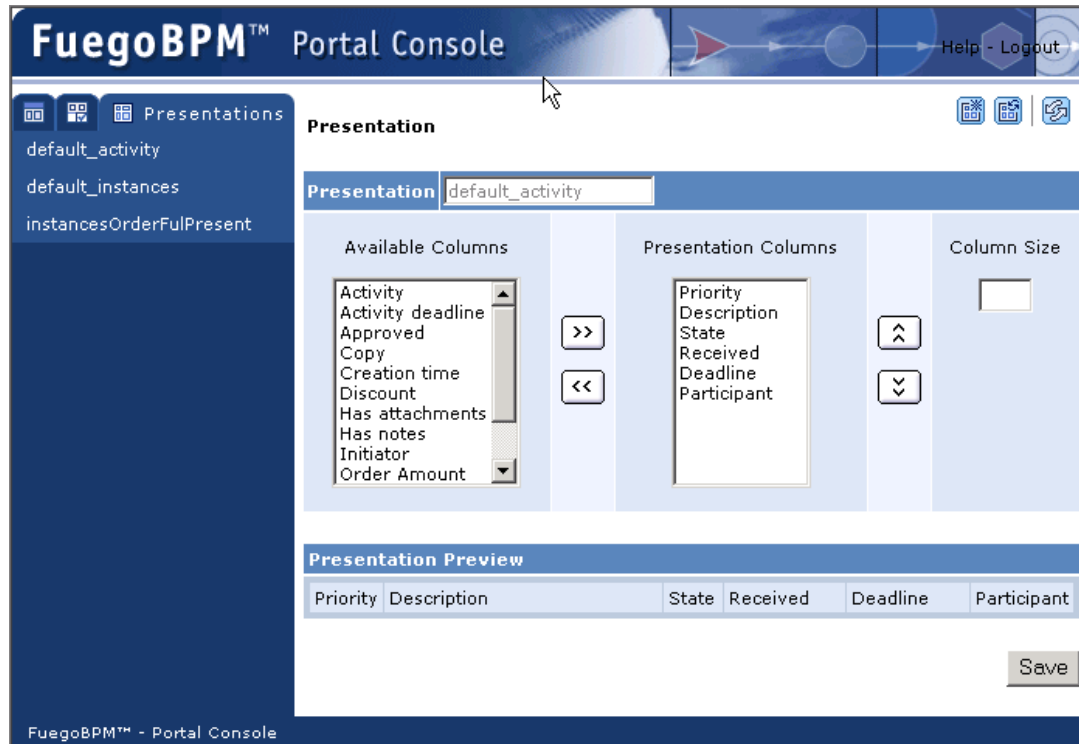
FuegoBPM Studio provides a fixed set of data that can be included in a presentation. However, the set of information can be extended by Process Designers. They can decide if other meaningful data or information needs to be made visible for Work Portal users.

FuegoBPM Portal Console provides you with two default presentations. These presentations are assigned to the default views that are automatically created when deploying a process:

- **default_instances** : Automatically applied to views that correspond to a process level. No matter the activity, all of the instances in the process are displayed in this kind of view. This is why **default_instances** presentation columns include the default column **Activity**, which provides users with the information about where an instance is currently located. The following image shows the **default_instances** presentation columns and additional available columns. An external variable *Order Amount* has been added to the default columns:




- **default_activity** : Applies to views that correspond to an activity level. The following image shows the **default_activity** presentation columns and additional available columns. The three external variables, *Order Amount*, *Payment Type* and *Discount*, have been added to the default columns:




Although these presentations have a default set of columns, you can change which columns are displayed. You can also vary the size of each column.

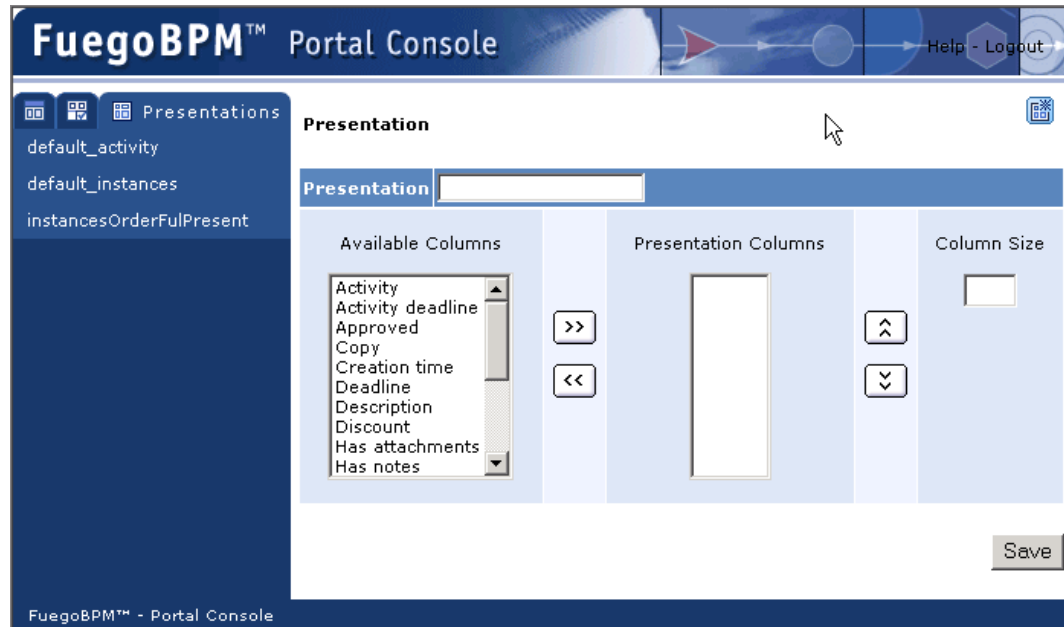
Note

 Any change made to a default presentation in the Portal Administrator applies to every view that uses the default presentation.

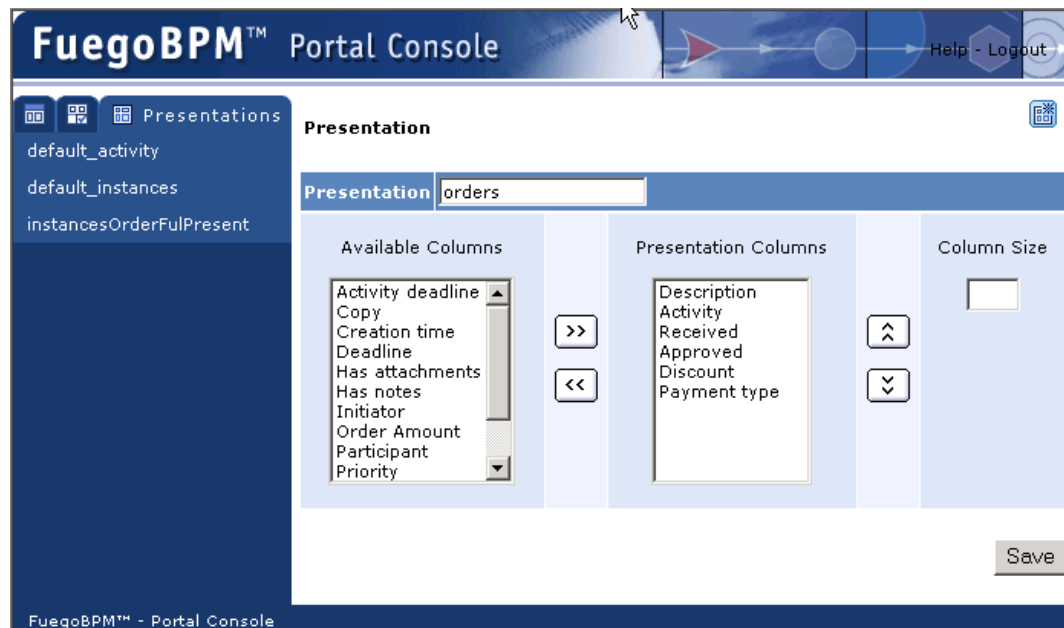
Creating a New Presentation

To create a new presentation

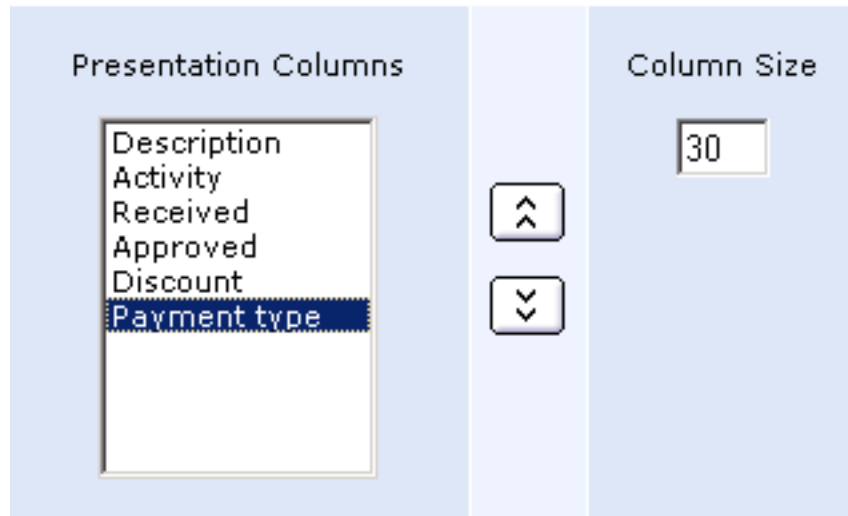
1. Click the **Create Presentation** icon  in the upper-right corner of the Presentation workspace. The presentation creation workspace appears:



2. Type the presentation name in the **Presentation** field.
3. Select the columns you want to include in your presentation from the **Available Columns** list box. Add or remove options by clicking the column name and then the right or left arrow buttons.



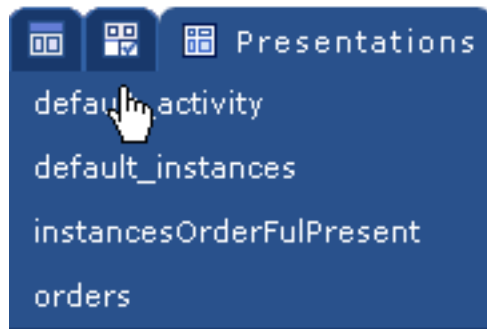
4. Select the order in which the columns should be displayed by clicking the column name in the **Presentation Columns** list box and then the up or down arrows.
5. Select a column from the **Presentation Columns** list box and enter a size for the column in the Column Size field. Repeat this for each column.



The screenshot shows a configuration interface with two main sections. On the left, under the heading "Presentation Columns", there is a list box containing the following items: "Description", "Activity", "Received", "Approved", "Discount", and "Payment type". The "Payment type" item is currently selected and highlighted. To the right of this list box are two buttons: an upward-pointing arrow (up arrow) and a downward-pointing arrow (down arrow). On the right side of the interface, under the heading "Column Size", there is a text input field containing the number "30".

6. Click the **Save** button to save the presentation.

After saving, the new presentation appears on the left side of the Presentation workspace.



The **Presentation Preview** appears at the bottom of the page.

Presentation Preview					
Description	Activity	Received	Approved	Discount	Payment type

Editing a Presentation

Presentations can be edited easily.


To edit a presentation

1. Open the Portal Administrator and select the **Presentations** tab.
2. Double-click the presentation to be edited. The presentation properties appear in the right panel of the workspace.
3. Make changes to the columns and column sizes as appropriate.
4. Click the **Save** button.



Deleting a Presentation

When a presentation is no longer needed, you can delete it.

To delete a presentation


1. Open the Portal Administrator and select the **Presentations** tab.
2. Select the presentation to be deleted and click the trash can icon  in the upper-right corner of the panel.

Note

 Default presentations cannot be deleted. The Recover Presentation  icon enables a recovery action. The presentation is restored to its default

values.

Recovering a Default Presentation

If you wish to revert to the original settings of one of the default presentations, select the default presentation and click the .












Recover default presentation icon.




Chapter 5. Toolbars

Customizing Work Portal Toolbars

FuegoBPM Work Portal displays an actions toolbar on top of the instance lists to enable users to easily perform operations such as send, abort, select, and so on for one or more instances. The appearance of toolbar can be customized and limited to contain only the actions that are needed for each role in an organization.

The default toolbar for every role includes the complete set of actions:

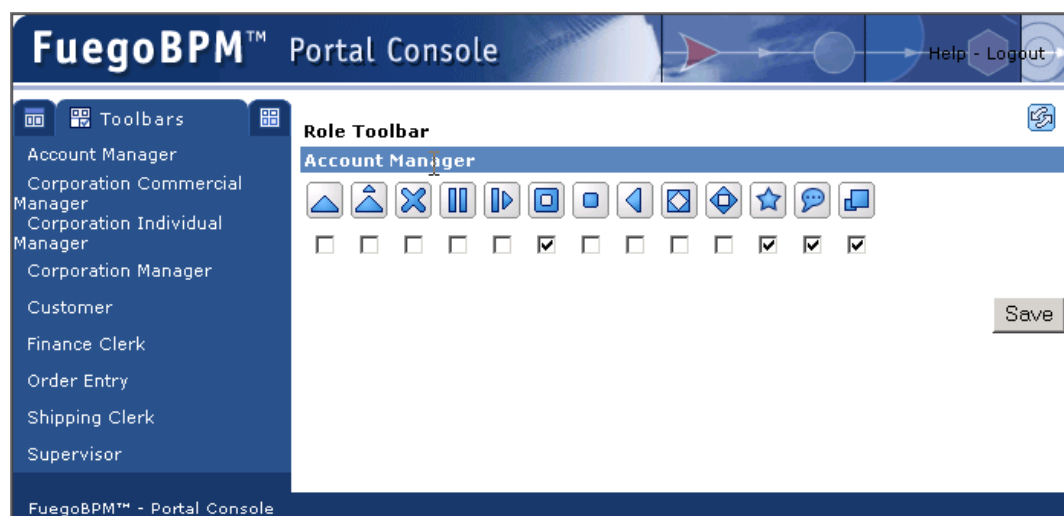
 Send	Sends the instance to next activity in the process.
 Send To	Sends the instance to next activity and assigns it to a certain person.
 Abort	Aborts the instance execution.
 Suspend	Suspends the instance execution.
 Resume	Resumes the instance execution.
 Select	Selects the instance so that only the participant who selected it can process it.
 Unselect	Unselects a previously selected instance.
 Back	Returns the instance in exception status to the original activity.
 Grab	Grabs an instance to modify the execution path.
 Ungrab	Ungrabs a previously grabbed instance.
 Bookmark	Bookmarks instances in the Bookmark view. Bookmarked

 Send	Sends the instance to next activity in the process.
	instances are set by participant; they are not shared between participants.
 Consultations	Enables Work Portal users to ask other participants about an instance with which they are currently working.
 View detail	Displays detailed information for the selected instance.

Administrator users can change the set of actions enabled for each role by using the **Toolbars** tab in Portal Administrator application.

To customize role actions toolbars

1. Launch Portal Administrator.
2. Select the **Toolbars** tab. A list including all of the roles in the organization appears on the left:




3. Click on the role for which you want to customize the actions toolbar. On the right, the complete set of actions appears as a

toolbar.

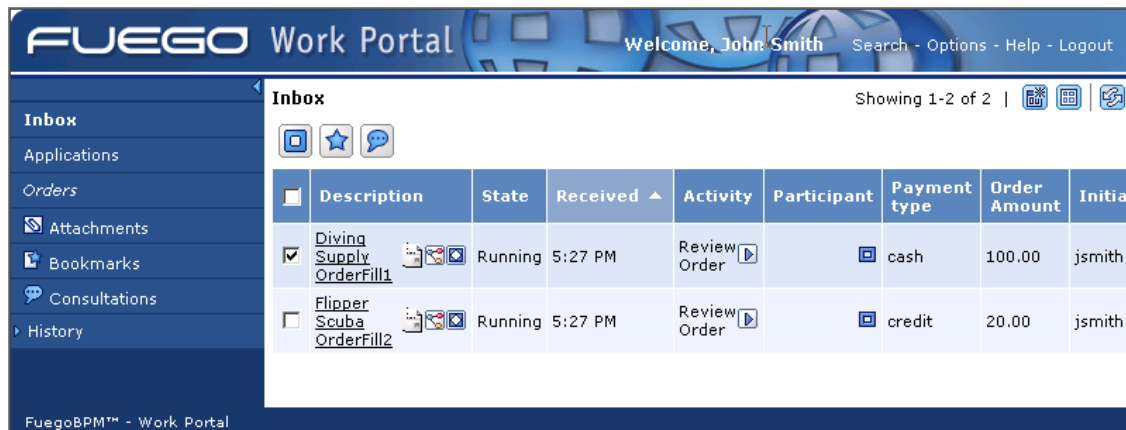
4. Uncheck the actions you want to disable and leave the icons checked for those actions you want to appear in Work Portal for users assigned to the selected role.
5. Save the changes.

Note

 Users assigned more than one role will see a toolbar containing all possible actions enabled for each of their assigned roles.

How toolbars are displayed in users' Work Portals

After the toolbar is customized in Portal Administrator, Work Portal users will only see the customized toolbar.



The screenshot shows the FUEGO Work Portal interface. The top header includes the FUEGO logo, the text "Work Portal", a welcome message "Welcome, John Smith", and navigation links "Search - Options - Help - Logout". A sidebar menu on the left contains links for "Inbox", "Applications", "Orders", "Attachments", "Bookmarks", "Consultations", and "History". The main content area displays an "Inbox" section with a table of items. The table has columns for "Description", "State", "Received", "Activity", "Participant", "Payment type", "Order Amount", and "Initials". Two items are listed: "Diving Supply OrderFill1" and "Flipper Scuba OrderFill2". Both are in "Running" state, received at "5:27 PM", and have a "Review Order" activity. The first item is checked and has a "cash" payment type with an amount of "100.00". The second item is unchecked and has a "credit" payment type with an amount of "20.00". Both items are assigned to "jsmith".

	Description	State	Received	Activity	Participant	Payment type	Order Amount	Initials
<input checked="" type="checkbox"/>	Diving Supply OrderFill1	Running	5:27 PM	Review Order		cash	100.00	jsmith
<input type="checkbox"/>	Flipper Scuba OrderFill2	Running	5:27 PM	Review Order		credit	20.00	jsmith