

# **FuegoBPM Work Portal 5 Documentation**

**Fuego, Inc.**

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# **FuegoBPM Work Portal 5 Documentation**

by Fuego, Inc.

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## **FuegoBPM Work Portal 5 Documentation**

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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.)

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## Chapter 2. Work Portal Basics

### What is FuegoBPM Work Portal

FuegoBPM Work Portal is a web interface tool that allows you to interact with a process in connection to your assigned role or roles within your company.

Work Portal allows you to effectively and efficiently manage your tasks with minimal extra training. It serves as a portal or window of a business process for which you have an assigned role.

When you select a pending task, Work Portal automatically opens an associated application and allows you to execute the transaction. Next, it sends each completed transaction to its next stage in the process.

Work Portal allows you to access your work with any Internet browser from any location. You can use the Work Portal interface like an e-mail reader to view incoming tasks you are responsible for.

Work Portal is your FuegoBPM tool to:

- Automatically launch needed applications and retrieve needed data regardless of where applications and data reside in the network.
- Prioritize tasks and automatically route them to the user or system responsible for the next step in the process.
- Delegate required tasks to the appropriate responsible users.

Work Portal allows you to:

- Process activities and tasks in current instances.

- Perform operations on a batch of instances.
- Execute a sequence of two or more tasks within an activity for a single instance without having to return to the **Work Portal** instances panel after each task.
- Add notes and attachments to an instance of a process.
- Customize how your instances are organized.
- View detailed task descriptions, notes, attachments and audit information.

### Example: Work Portal - Typical View

This is a typical view of the Work Portal main screen after you log on.



The screenshot shows the FUEGO Work Portal interface. The header includes the FUEGO logo, 'Work Portal', a welcome message for John Smith, and navigation links for Search, Options, Help, and Logout. A left sidebar contains links for Inbox, Applications, Attachments, Bookmarks, Consultations, and History. The main area displays an 'Inbox' table with three entries. Each entry includes a checkbox, a description with a document icon, an activity name with a play button icon, a state (Running), a participant, a payment type (credit), an order amount, an initiator (John Smith), and a received timestamp.

		Description	Activity	State	Participant	Payment type	Order Amount	Initiator	Received
<input type="checkbox"/>		Diving Supply OrderFill1	Review Order	Running		credit	21.45	John Smith	10:26 AM
<input type="checkbox"/>		Flipper Scuba OrderFill2	Review Order	Running		credit	78.04	John Smith	10:26 AM
<input type="checkbox"/>		Scubapro Dive Shops OrderFill3	Check Credit	Running		credit	250.00	John Smith	10:29 AM

## Work Portal and other Fuego tools

For most end users, FuegoBPM Work Portal is the only FuegoBPM tool they will ever use. Nevertheless, it is helpful to learn about other FuegoBPM tools and understand how they work together behind the scene to orchestrate your business processes.

FuegoBPM system is a set of business tools that provides you and your business with the ability to design, activate, and deploy

business processes into a live environment. The platform lets you quickly combine dissimilar applications into integrated business processes. You can then modify these processes in real-time, enabling your business to dynamically react to changing market conditions.

Other FuegoBPM tools:

<b>Category</b>	<b>Tool</b>	<b>Use</b>	<b>User</b>	<b>FuegoBPM Version</b>
Design	FuegoBPM Studio	IDE tool used to create visual depictions of business processes and write computer programming script to define underlying business rules and logic. Allows standard FuegoBPM and third-party software components to be integrated into the business process design so that they can be	Business Analysts, Developers, IT Staff	Express and Enterprise

Category	Tool	Use	User	FuegoBPM Version
		launched to perform tasks.		
Task Management	Work Portal	Web interface for viewing and processing tasks.	Person assigned a role in a business process	Express and Enterprise
Administrative	FuegoBPM Server	Program that runs the FuegoBPM system. Administers the deployed processes. Controls and administers process instances.	IT Staff	Express and Enterprise
Administrative	Administration Console	Manages all aspects of FuegoBPM Server, including server and database maintenance. Defines organizational data such as business process roles and participants within those	IT Staff, Supervisors	Enterprise



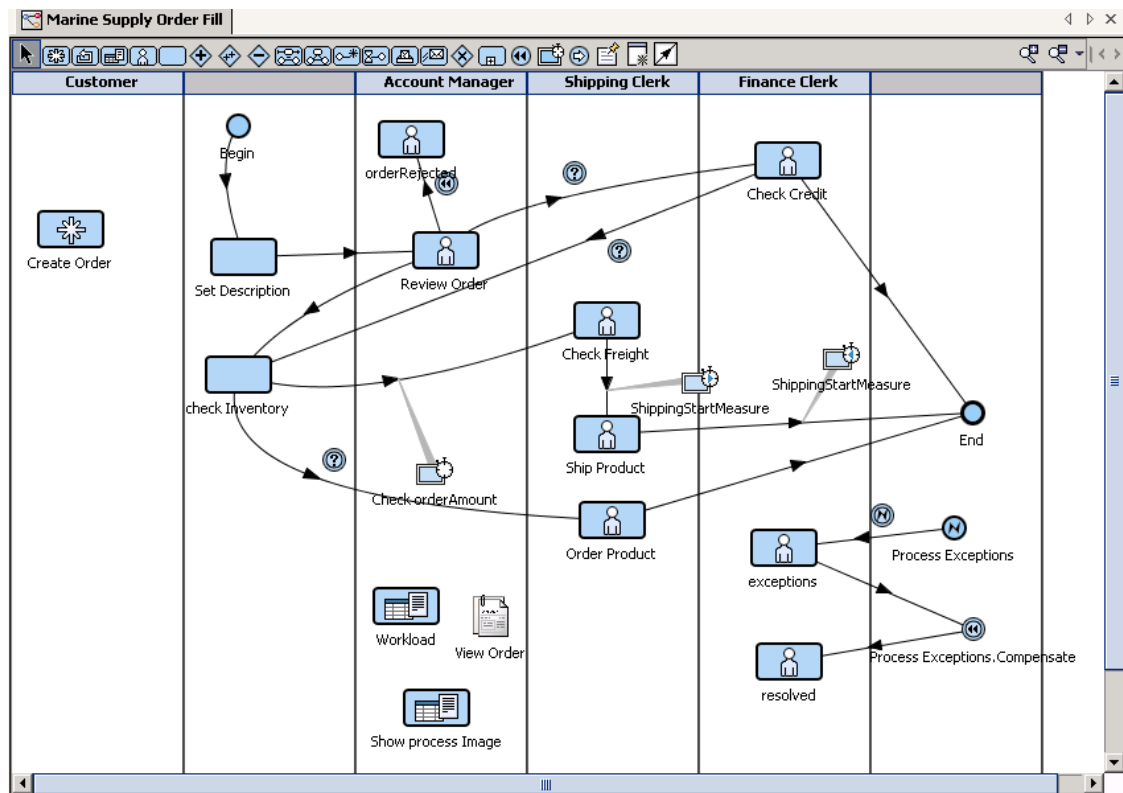
Category	Tool	Use	User	FuegoBPM Version
		roles in directory services. Allows to administer Work Portal end users views		

## Business Process Elements

To help you to better understand what is happening in the background when you use FuegoBPM Work Portal, this topic examines the different elements of a business process. The diagram shown below was created in FuegoBPM Studio. It shows a simplified order fulfillment service.

In actual practice, most business process designs are much more complicated, with many more roles and activities than the ones shown here, but this is a good example to demonstrate how you use Work Portal to participate and perform tasks within an overall business process.

Example: A typical order fulfillment business service



The following hotspots provide details on the major elements of business processes:

## Roles

In the diagram above, the vertical columns represent roles. A role is identified at the top of each column: Customer, Account Manager, Shipping Clerk and Finance Clerk.

The columns with no headings represent automatic roles. These are roles that are performed by the FuegoBPM Server without the need for human intervention. In our example one individual is assigned to each one of these roles.

## Activities

The various shapes, the "square doughnut", small and large disks are activities.

Instances follow the flow indicated by the lines with the small arrowheads. All instances start with the Begin activity and flow through the process until they reach the End activity.

The person or persons assigned to a role are responsible for processing the activities in their Role column or "swim lane." For example, in the example above, the person or persons assigned to the role of Shipping Clerk are responsible for processing the following activities: Check Inventory, Order Product, Check Freight and Ship Product.

Activities with no role assigned are automatically performed by the FuegoBPM Server (see Work Portal and the Other Applications of FuegoBPM .) These automatic activities take place in the background and are never visible to the end user from the Work Portal.

## Tasks

Although not visible on the diagram, each activity contains one or more tasks that must be executed by the person or persons assigned to the role in the column where the activity is located. Only one of those tasks can be mandatory. In the process above, for example, the Account Manager has two tasks within the Review Order activity--one is to actually review the order, and the other is to send an e-mail notification when she has completed her review. This last task is optional.

## Transitions

The process begins when a Customer initiates an order. An instance is created and an order is started. The order starts moving through the process as shown above. The order is first sent to the Account Manager for review. After reviewing the order, the Account Manager sends it to the Shipping Clerk to perform the activities listed for that role: Check Inventory, Check Freight, and Ship Product. If the requested product is not in inventory, the Shipping Clerk must perform the Order Product activity for the instance. If the method of payment for the order is credit, then the Account Manager also

sends a copy of the order to the Finance Clerk to perform a credit check on the Customer.

The lines connecting the activities are called transitions. They indicate the process flow.

### **Unconditional**

The lines with no additional information are unconditional transitions. This means that, as soon as the mandatory task in an activity is processed, the instance (or, more specifically in our example, the order) is sent to the next activity to which the line connects.

### **Conditional**

Notice that several lines have a question mark on them. These are conditional transitions. To understand these, look at the conditional transition line that runs from the Review Order activity to the Check Credit activity. This conditional transition line indicates that if a Customer asks to order a product on credit, then the order must be sent to the Finance Clerk to check the Customer's credit worthiness before the order can be approved.

### **More on Conditional Transitions**

Another conditional transition on the diagram above occurs within the Shipping Clerk role but between two different activities: Check Inventory and Order Product. This conditional transition line indicates that if the Shipping Clerk checks inventory and finds that the requested product is out of stock, then he must order more of the product and indicate that the status of the order is "on backorder."

What happens if an activity has both unconditional and conditional transitions flowing out of it? The quick answer is that conditional transitions always override the unconditional transitions.

### **Multiple conditional transitions**

To understand this fully in detail, look at the Check Inventory activity in our example above. It has an unconditional transition flowing to

the Check Freight activity, but it also has two conditional transitions. One of them flows to Check Credit and the other one flows to Order Product.

Let's first examine the conditional transition to Check Credit. The condition programmed into this transition is that "payment" = "credit". If the Shipping Clerk determines that the order is a credit order (if, for some reason, the Account Manager missed this when he reviewed the order) she indicates this by clicking the Yes button when prompted by a dialog box in Work Portal. This sets a "Credit" flag which meets the "true" condition of this first conditional transition, so that the instance is sent to the Finance Clerk to check the Customer's credit.

Now examine the conditional transition that flows from Check Inventory to Order Product. The condition programmed into this transition is that "stock" <= 0. If the Shipping Clerk determines that the product is not in inventory, she indicates this by clicking the No button when prompted by a dialog box in Work Portal. This sets the stock variable with 0 value on the instance which meets the "true" condition of the conditional transition, so the instance is sent to the Order Product activity.

If the order is *not* a credit order and *is* in inventory, then both conditional transitions are "false" and the unconditional transition takes precedence over the two conditional transitions.

What happens if the order is both a credit order and is out of stock? When the process is first designed in FuegoBPM Studio/Designer, multiple conditional transitions flowing out of an activity are ranked according to precedence. In the case of our example, the Check Inventory to Check Credit conditional transition has been given precedence over the Check Inventory to Order Product conditional transition. This means that if the order is both a credit order *and* is not in inventory, then the instance would flow next to the Check Credit Activity. The Customer's credit status would be checked before the product was ordered.

## Exceptions

The lightning bolt symbol shown at the right of the diagram is an Exception.

This symbol is used to graphically state that if, for some reason, there is a problem with a particular instance, let's say for example that a discontinued product is accidentally ordered, or the weight of the order exceeds the limit set by the indicated Shipper, an exception is thrown. This means that the instance is automatically sent to the Exception activity. The instance is then forwarded to the next activity pointed to by the Exception.

In our example, all exceptions are forwarded to the End activity. Even though an instance is not successfully processed according to the intent of the process design, it is forwarded to the End activity in order to prevent bottlenecks or backlogs. In our sample process, an exceptions report would probably be periodically generated so that a track of all instances which failed to successfully complete the process could be kept and be given special consideration.

## A day in the life of a Work Portal Participant

Here is an example of how a finance clerk responsible for checking credit in the Marine Supply Order fulfillment business process would do her job using **Work Portal**.

### Step 1: Check Work Portal work queue

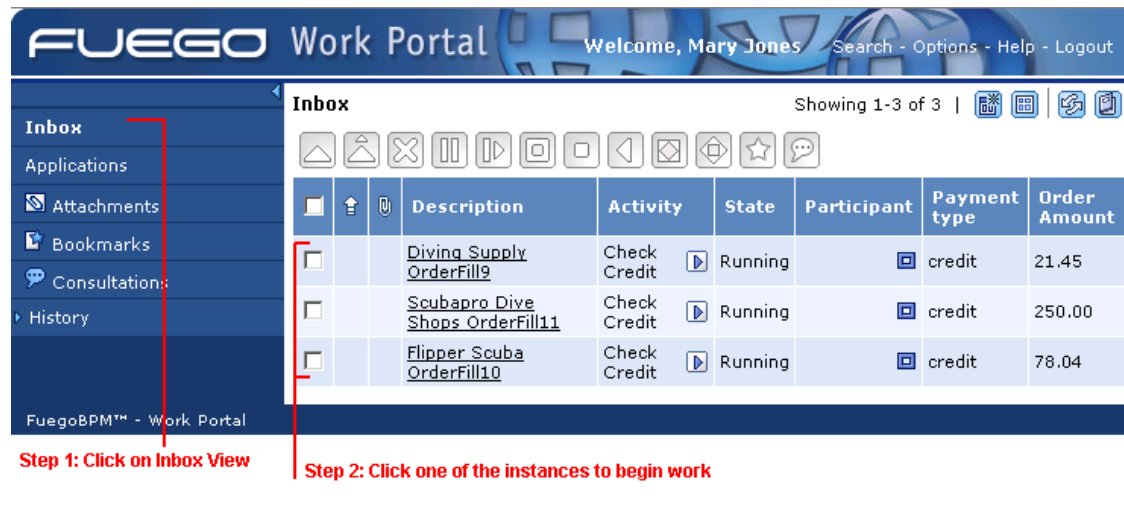
Our finance clerk, Mary Jones, checks her **FuegoBPM Work Portal** periodically throughout the day to see if there are any orders coming in that need a credit check.

#### Note






Work Portal can also be configured to use your regular e-mail service to notify you of incoming instances.

To do this, Mary clicks on the **Inbox** view in the left panel of her Work Portal. All instances pending to be processed are displayed in the right panel.



**FUEGO Work Portal** Welcome, Mary Jones Search - Options - Help - Logout


**Inbox** Showing 1-3 of 3

		Description	Activity	State	Participant	Payment type	Order Amount
		<a href="#">Diving Supply OrderFill9</a>	Check Credit	Running		credit	21.45
		<a href="#">Scubapro Dive Shops OrderFill11</a>	Check Credit	Running		credit	250.00
		<a href="#">Flipper Scuba OrderFill10</a>	Check Credit	Running		credit	78.04


FuegoBPM™ - Work Portal

**Step 1: Click on Inbox View** **Step 2: Click one of the instances to begin work**

## Step 2: Select instance

Mary then clicks on the icon  next to the instance description to process one of the instances currently located in activity **Check Credit** to begin working.

## Step 3: Execute tasks

Mary next investigates the credit worthiness of the Customer against the order amount, which in this example is shown at the top right corner of the right panel. Once she has the information she needs and determines whether Marine Supply should extend credit to the customer, Mary executes the task by clicking on the **Process Task** button  shown next to the task.

**Example:**

**FUEGO Work Portal** Welcome, Mary Jones Search - Options - Help - Logout

**Inbox** Showing 1-3 of 3

	Description	Activity	State	Participant	Payment type	Order Amount
<input type="checkbox"/>	Diving Supply OrderFill9	Check Credit	Running	<input type="checkbox"/>	credit	21.45
<input type="checkbox"/>	Scubapro Dive Shops OrderFill11	Check Credit	Running	<input type="checkbox"/>	credit	250.00
<input type="checkbox"/>	Flipper Scuba OrderFill10	Check Credit	Running	<input type="checkbox"/>	credit	78.04

FuegoBPM™ - Work Portal

Click her to execute Check Credit task

A dialog box is displayed asking her if she has checked the customer's credit. Mary clicks **Yes**.

### Example:

**FUEGO Work Portal** Welcome, Mary Jones Search - Options - Help - Logout

Approve Credit?

Approve Credit?

Yes No

Optional Tasks

FuegoBPM™ - Work Portal

Click on the appropriate button

Execute Optional Tasks if needed

While the task is being executed, the Optional tasks toolbar that is displayed on the right allows Mary to enter notes and attach files to the instance.

In this example there is just one task associated to the **Check Credit** activity.

In your own business process there might be several optional tasks associated to each activity in addition to the main task to execute.




In cases where additional optional tasks exist, they can be executed while executing the main task using this toolbar option next to the buttons to add notes and attachments.


In order to do this, you must select one of the menu options by clicking on the Optional Tasks pop up menu.

The list of optional tasks appears. When the optional task is selected, the task is executed in a new window.



## Step 4: Send instance to next activity

The Work Portal task panel reappears and the **Process Task** button is now dimmed and unavailable . Since she has now completed the sole task of the order, Mary is ready to send the order to the next activity in the process.

She clicks the **Send Instance** button  next to the **State** column.


### Example:

The screenshot shows the FUEGO Work Portal interface. At the top, it says "FUEGO Work Portal" and "Welcome, Mary Jones". Below the header, there's a sidebar with navigation options: Inbox, Applications, Attachments, Bookmarks, Consultations, and History. The main area is titled "Marine Supply Order Fill > Inbox" and shows "Showing 1-3 of 3". A toolbar with various icons is visible above a table of tasks. A red line points to the "Send Instance" button (represented by a play icon) in the toolbar for the first task.

	Description	Activity	State	Participant	Payment type	Order Amount
<input type="checkbox"/>	<a href="#">Diving Supply OrderFill9</a>	Check Credit	Running	<input type="checkbox"/>	credit	21.45
<input checked="" type="checkbox"/>	<a href="#">Scubapro Dive Shops OrderFill11</a>	Check Credit	Activity completed	<input type="checkbox"/>	credit	250.00
<input type="checkbox"/>	<a href="#">Flipper Scuba OrderFill10</a>	Check Credit	Running	<input type="checkbox"/>	credit	78.04


Click the Send Instance button

## Note

 Send operation might not be necessary to be performed depending on the process design. In such cases, the instance is automatically sent to the next activity in the process. Also, send and other buttons might even not be present in the toolbar since the toolbar can be customized by role. If you consider that you need to send an instance to complete the pending tasks, ask an administrator user for assistance

The order is now sent to the next activity in the process, which in our example is the End activity. Mary's work with this order is complete. She is now ready to begin processing the next order in her folder.

## Note

 Even though you may reject or give a negative response for a task (for example, not approving a Customer's credit) you must still process the task and then send the order to the next activity to keep an order moving through the process for completion. The completion of a process does not necessarily mean a successful outcome.

# Using Work Portal as a team

This topic follows an instance through a simplified order fulfillment business process in order to help you see how an instance travels through a business service and how it appears in each participant's

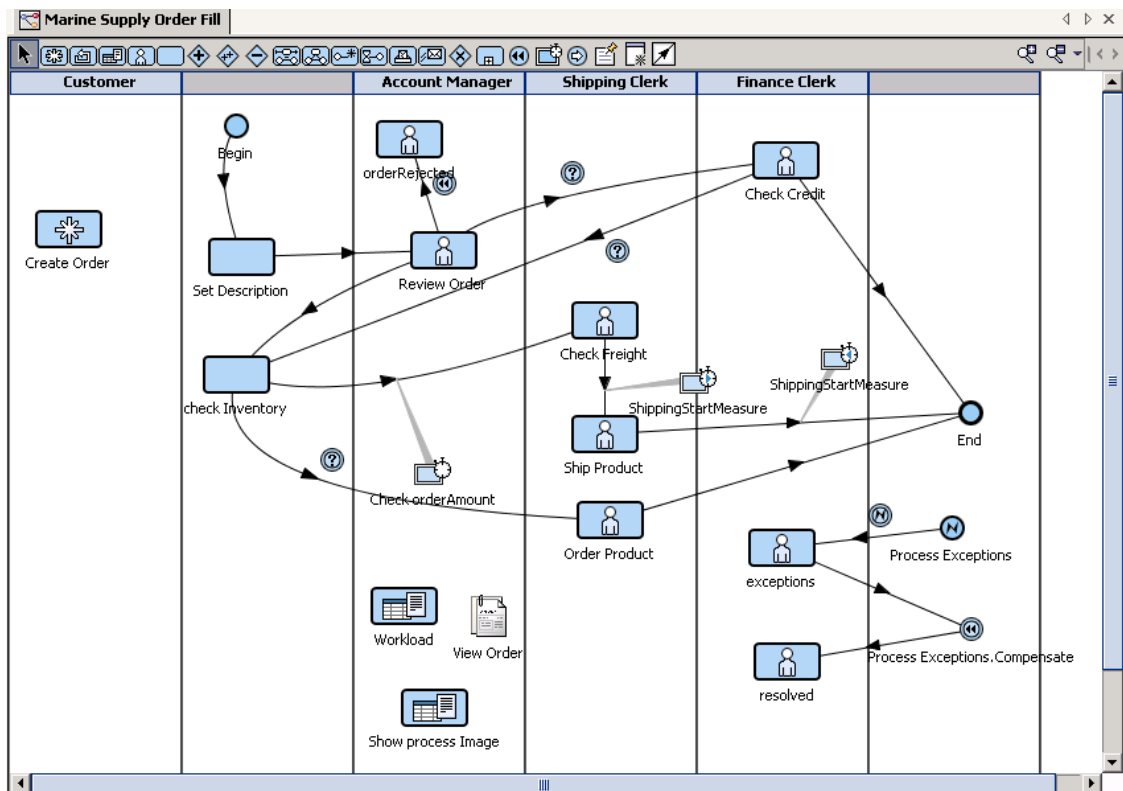
Work Portal.

## An Overview

Work Portal is an apt description of this FuegoBPM tool. It is a portal or window into an overall business process. Just like a window looking out onto a landscape, it helps you frame and define your view. With Work Portal you only see those tasks you are responsible for. As such, it is an effective tool that helps you maintain a clear division of roles and responsibilities, encouraging accountability and allowing you to prioritize your work.

The following example is a simple diagram (created with FuegoBPM Studio) depicting an order fulfillment business process.

### Order fulfillment business process



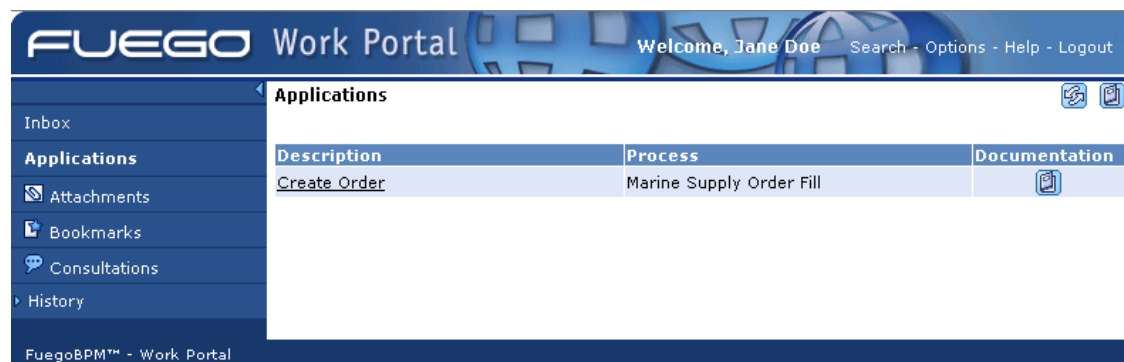
As it can be seen in the diagram, there are four roles in this sample order fulfillment business process. The roles are depicted by the

vertical columns or "swim lanes" in the diagram. The name for each role is on the top of the column. The two unlabeled roles are automatic roles. FuegoBPM Server performs these roles automatically. To simplify this example, only one individual is assigned to each role.

## Customer

Jane Doe is assigned to the Customer role. Even though she is actually a Marine Supply employee, Jane assumes the role of Customer to create instances based on real customer requests by Internet, telephone, fax, letter or purchase order. For the sake of our example, let's assume that a customer, Commercial Diving Supply has sent her an urgent order by fax. She logs onto her Work Portal. She clicks her **Applications** view in the left panel. She clicks **Create Order** in the right panel.

### Example:



In this example the order number is automatically assigned by the system and Jane types into an electronic form the customer, the customer type, the payment type and the items to order. The price and order amount are automatically filled in. She clicks **Ok** on the form. **Example:**

The screenshot displays the FUEGO Work Portal interface. At the top, the header includes the FUEGO logo, the text 'Work Portal', and a welcome message 'Welcome, Jane Doe' along with links for 'Search', 'Options', 'Help', and 'Logout'. Below the header, there is a form with several fields: 'Customer' (a dropdown menu showing 'Diving Supply'), 'Customer Type' (a dropdown menu showing 'commercial'), and 'Payment Type' (a dropdown menu showing 'credit'). Below these fields are several icons. The main part of the form is a table with the following columns: 'Item', 'Item Price', 'Item Quantity', and 'Total'. The table contains two rows of data: Row 1 with 'Item1020', price 21.45, quantity 1.00, and total 21.45; Row 2 with 'Item1030', price 56.35, quantity 1.00, and total 56.35. Below the table, there is a pagination control showing '1 - 2 / 2'. At the bottom right of the table area, there is a 'Total' row showing a total of 77.80. Below the table, there are three buttons: 'submit', 'refresh', and 'cancel'. At the very bottom of the page, there is a footer that reads 'FuegoBPM™ - Work Portal'.

	Item	Item Price	Item Quantity	Total
1	Item1020	21.45	1.00	21.45
2	Item1030	56.35	1.00	56.35
Total				77.80

The instance flows to the Begin activity where the FuegoBPM Server automatically sends it to the next activity in the business process, which in our example is Review Order.

## Accounts Manager

The order next appears in Accounts Manager, John Smith's Work Portal. John finds the order description in the list of orders in the instance panel of his Work Portal and clicks it.

Example:

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Inbox** Showing 1-4 of 4

		Description	Activity	State	Participant	Payment type	Order Amount
<input type="checkbox"/>		Diving Supply OrderFill9	Check Credit	Running		credit	21.45
<input type="checkbox"/>		Flipper Scuba OrderFill10	Check Credit	Running		credit	78.04
<input type="checkbox"/>		Scubapro Dive Shops OrderFill11	Check Freight	Running		credit	250.00
<input type="checkbox"/>		Diving Supply OrderFill12	Review Order	Running		credit	77.80

FuegoBPM™ - Work Portal

John clicks the Order's Description

The task panel opens. Note that there is a check in the **Mandatory** column for the **Review Order** task. This means that John must process the task before sending the instance on. There is no check in the **Mandatory** column for the **Mail** task. This means that this task is optional so that John can send on the instance without processing this **Mail** task if he wants. John processes the tasks under the **Review Order** activity. Once the mandatory task has been performed, the instance is automatically sent to the next activity. In this case, as the order payment type is "credit", the instance is sent to **Check Credit** activity.

Example:

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Inbox > Diving Supply OrderFill12**

**Details**

<b>Process:</b>	Marine Supply Order Fill	<b>Activity:</b>	Review Order
<b>Priority:</b>	Normal	<b>Status:</b>	Running
<b>Received:</b>	Feb 23, 2005 2:19:23 PM	<b>Deadline:</b>	
<b>Participant:</b>		<b>Copy:</b>	0

**Process Owner Image** **Optional applications**

**Process Definition Image:**

Task	Participant	Status	Mandatory	Repeatable	Last execution
Review Order		Pending	✓		
Mail		Pending		✓	

**Notes**

Description	Date	Participant	Activity
No notes available.			

**Attachments**

Name	Version	Creator	Filename	Locked by	Action
No attachments available.					

FuegoBPM™ - Work Portal

John processes the Review Order task

## Finance Clerk

The order appears in Finance Clerk Mary Jones' Work Portal. Mary must complete the **Check Credit** task under the **Check Credit** activity.

Example:

**FUEGO Work Portal** Welcome, Mary Jones Search - Options - Help - Logout

**Inbox > Diving Supply OrderFill12**

**Details**

Process:	Marine Supply Order Fill	Activity:	Check Credit
Priority:	Normal	Status:	Running
Received:	Feb 23, 2005 2:25:32 PM	Deadline:	
Participant:		Copy:	0

Task	Participant	Status	Mandatory	Repeatable	Last execution
Check Credit		Pending	✓		
Review Order		Pending		✓	

**Notes**

Description	Date	Participant	Activity
No notes available.			

**Attachments**

Name	Version	Creator	Filename	Locked by	Action
No attachments available.					

FuegoBPM™ - Work Portal

Mary processes the Credit Check task

Then, she approves the customer credit. This makes the instance automatically go to the next activity; in this case the Check Inventory activity automatically verifies the stock of the ordered items.

**FUEGO Work Portal** Welcome, Mary Jones Search - Options - Help - Logout

Approve Credit?

Approve Credit?

Yes No

FuegoBPM™ - Work Portal

## Shipping Clerk

The instance next appears in shipping clerk, Robert Brown's Work Portal. As shown in the diagram of the business process above, the



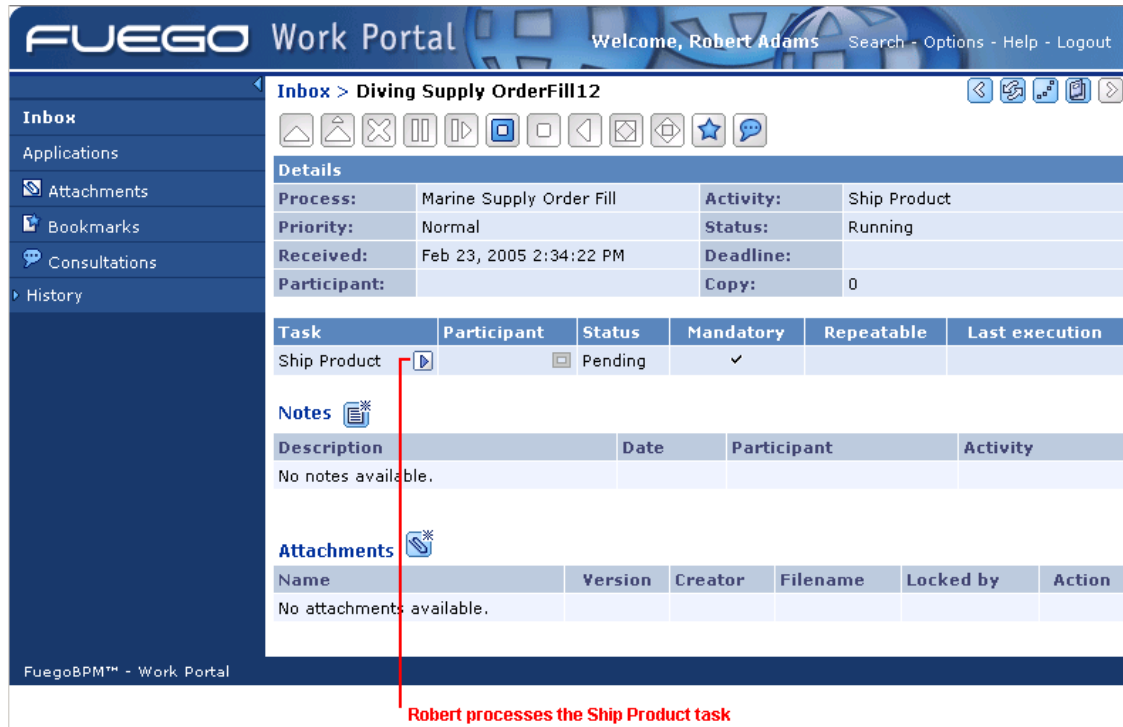
shipping clerk has several activities to complete. He processes each activity in order:

- **Check Freight**
- **Ship Product**

If the automatic activity **Check Inventory** had found that there was not enough stock to deliver for this order, the instance would have been sent to **Order Product** activity.

After completing the tasks in the Ship Product activity, Robert sends the instance to the next activity.

Example:



**FUEGO Work Portal** Welcome, Robert Adams Search - Options - Help - Logout

**Inbox > Diving Supply OrderFill12**

**Details**

Process:	Marine Supply Order Fill	Activity:	Ship Product
Priority:	Normal	Status:	Running
Received:	Feb 23, 2005 2:34:22 PM	Deadline:	
Participant:		Copy:	0

Task	Participant	Status	Mandatory	Repeatable	Last execution
Ship Product		Pending	✓		

**Notes**

Description	Date	Participant	Activity
No notes available.			

**Attachments**

Name	Version	Creator	Filename	Locked by	Action
No attachments available.					

FuegoBPM™ - Work Portal

Robert processes the Ship Product task

Robert fills in the shipping form with the appropriate information. Once the data have been entered, the instance is automatically sent to the End activity.

The screenshot shows the 'FUEGO Work Portal' interface. At the top, a blue banner contains the logo, the text 'Welcome, Robert Adams', and links for 'Search - Options - Help - Logout'. Below the banner is a 'Shipping Address' section. It contains a form with the following fields: 'Order #' (with a value starting with '/OrderFill#Default-1.2/12/0@Fue'), 'Name:' (Diving Supply), 'Street Address:' (2400 Dallas Pkwy, Suite 350), 'City' (Plano), 'State' (Texas), 'Postal Code' (75093), 'Select a country' (US), and 'Select a carrier'. The carrier dropdown menu is open, showing options: FedEx, Arrow, LoneStar, and Airborne. An 'Ok' button is located below the form. At the bottom of the page, a blue bar reads 'FuegoBPM™ - Work Portal'.

The final activity in this sample order fulfillment business process is the automatic **End** activity. At this point, the product has been shipped and the order is complete. Therefore, the FuegoBPM Server automatically terminates the order fulfillment business process for this order.

## Understanding Business Service Orchestration

While first-generation Enterprise Application Integration (EAI) was not more complicated than a string quartet, today's integration challenges combine the complexities of a full symphony with the fast-paced movement of a marching band. This is why Fuego created **Business Services Orchestration** (BSO). *Learn more in [www.fuego.com](http://www.fuego.com)...* [<http://www.fuego.com>.]

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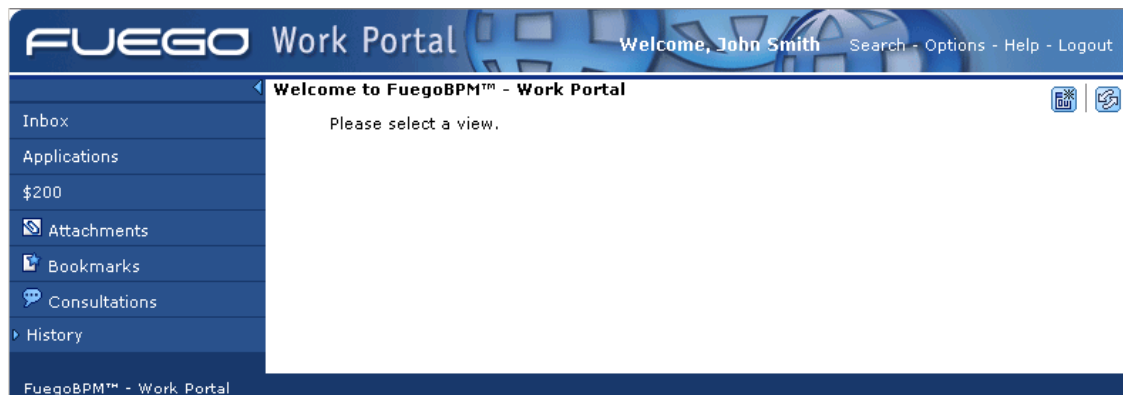
# Chapter 3. The Work Portal Work Space

## The Work Portal workspace

When you first access Work Portal after logging on, the left panel of the Work Portal main window lists all the views that were created to group instances that you have been given permission to see or process.

The views are displayed as a tree.

Work Portal only displays views corresponding to processes in which you have been assigned a role.

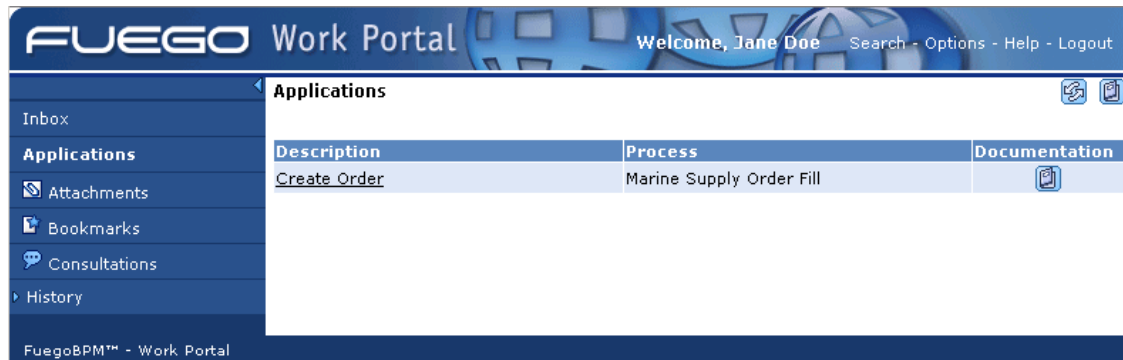


Views are designed by Administrator users to display instances, activities or attachments.

Click these views to display or execute the activities, instances and tasks to which you are assigned.

## Views

When you click a view name, the elements associated to that view appear in a list in the right panel. Example:



The views appearing in the list are based on the roles assigned to you. Each role is associated to certain activities in a process. For example, if you are a Finance Clerk, your role might be assigned to the Check Credit activity in your company's order fulfillment process. As a result, when you log onto Work Portal, views designed to contain instances in the Check Credit activity would appear.

## Views can be set to different font styles:

- When the view is bold, it means that is the current view for the Work Portal session.
- When the view is in italics, it means that a new instance has arrived at that view but the end user has not selected the view yet. Although the new instances might have already been processed by some other user, the view remains in italics until the session user selects it. If that is the case, there will not be any new instances to be processed when the user selects it.

## Instances

An instance is a representation of a single enactment of a process. When you click an instances view, each instance is listed in the right panel of the Work Portal. Example:

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

Inbox Applications **\$200** Attachments Bookmarks Consultations History

**\$200** Showing 1-3 of 3

		Description	Activity	State	Participant	Payment type	Order Amount
<input type="checkbox"/>		Scubapro Dive Shops OrderFill11	Check Freight	Running		credit	250.00
<input type="checkbox"/>		Industrial Salvage OrderFill13	Review Order	Running		credit	335.96
<input type="checkbox"/>		Scubapro Dive Shops OrderFill14	Review Order	Running		credit	300.00

FuegoBPM™ - Work Portal

## Tasks

When you click an instance, additional information is displayed and shows each task or tasks that need to be processed before the instance can be sent on to the next activity in the process.

### Example:



**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout


Inbox Applications **\$200** Attachments Bookmarks Consultations History





**\$200 > Scubapro Dive Shops OrderFill14**


Details

Process:	Marine Supply Order Fill	Activity:	Review Order
Priority:	Normal	Status:	Running
Received:	Feb 23, 2005 3:06:32 PM	Deadline:	
Participant:		Copy:	0


Process Owner Image:  Optional applications: 

Process Definition Image: 

Task	Participant	Status	Mandatory	Repeatable	Last execution
Review Order		 Pending	✓		
Mail		 Pending		✓	

Notes 

Description	Date	Participant	Activity
No notes available.			

Attachments 

Name	Version	Creator	Filename	Locked by	Action
No attachments available.					

FuegoBPM™ - Work Portal

The checkmark in the **Mandatory** column indicates that the task is mandatory and must be completed before sending the instance on to the next activity. When the task has no checkmark, it means that it is optional and does not have to be completed before sending the instance on.

You can perform the optional and mandatory tasks in any order you want. It is also possible to execute one task and while that task is executing, from the execution window, launch any of the optional tasks.

Optional tasks shown in the **Optional tasks** toolbar include the tasks defined as **optional** in the process activity design that were defined as read only. It also includes the **global applications** if any is available for you to execute.





The screenshot shows the FUEGO Work Portal interface. At the top, there's a header with the logo and navigation links. Below the header, there's a form with fields for Customer, Customer Type, and Payment Type. A toolbar with icons is visible above the form. A dropdown menu is open, showing options like 'Mandatory', 'Optional Tasks', and 'Workload'. Below the form, there's a table with columns: Item, Item Price, Item Quantity, and Total. The table contains one row with 'Item1041' and a total of 300.00. At the bottom, there are buttons for 'submit', 'refresh', and 'cancel'.











Item	Item Price	Item Quantity	Total
1 Item1041	300.00	1.00	300.00
Total			300.00















## Understanding Instance information columns

When you click on any instances view in the left panel, the right panel of your screen changes and detailed information is provided for the list of instances.

**Example:**

Marine Supply Order Fill > Inbox First Showing 1-4 of 4 [Last](#) |    


✓	Description	Activity	State	Received	Deadline	Participant	Order Amount	Payment type
<input type="checkbox"/>	<a href="#">Diving Supply OrderFill6</a>	 Review Order 	Activity completed 	2:41:31 PM			80.00	credit
<input checked="" type="checkbox"/>	<a href="#">Diving Supply OrderFill7</a>	 Review Order 	Running	3:49:04 PM			20.00	cash
<input type="checkbox"/>	<a href="#">Flipper Scuba OrderFill8</a>	 Review Order 	Activity completed 	3:49:26 PM			9,000.00	credit
<input type="checkbox"/>	<a href="#">Scubapro Dive Shops OrderFill9</a>	 Review Order 	Running	3:49:43 PM			80.00	cash




Standard Columns
Specific Columns for this Business Process

### Instance Information Column Descriptions



The information displayed as columns for each Instances View depends on the presentation assigned to the view by administrator users or by yourself if this operation has been enabled to you. Each presentation might include one or more standard columns provided by FuegoBPM and one or more specific columns defined by developers that designed the business processes as in the example above.

The following table provides a description of each default column that is always available to be included in instances presentations:

Column Name	Description
	Toggle Selection Column: Select check box next to each instance to process two or more instances at the same time. Click the <b>Toggle Selection</b> button to select all instances.
Description	Title of the process instance

Column Name	Description
	specified during the creation of the instance. When you click on the description, the tasks, notes, and attachments associated to the instance are displayed.
Process	Name of process in which the instance is running.
Activity	Name of activity in which instance is current.
Priority 	Importance of the instance that was defined in the process design. High priority icon:  . Low priority icon:  . Normal priority is the default and does not show any icon.
Status	Displays one of the following: * <b>Running:</b> Instance is active and running normally. * <b>Pending:</b> Awaiting processing of activities. * <b>Activity Completed:</b> Activities completed but instance has not been sent to next activity in process. Click the Send Instance button to send the instance. * <b>Suspended:</b> Instance is paused at this activity. To resume the instance, click the Resume Instance button in the toolbar. See <b>Notes</b> below. * <b>Grabbed:</b> The instance has been shunted to a Grab activity due to a particular condition stipulated in the process design. (See Using the Grab Activity for further information.) * <b>Exception:</b> An exception has occurred.
Received	Displays date and time on which the instance was received.



Column Name	Description
Activity Deadline	Date/time activity must be completed before it is removed from your queue.
Process Deadline	Date/time instance must complete entire process before it is removed from your queue.
Deadline	Date/time instance must be completed before it is removed from your queue. (Depending on which is sooner, this deadline will be the same as the Process Deadline or the Activity Deadline.)
Participant	This field is blank unless you or another user (with the same assigned role as you) has selected the instance using the <b>Select Instance</b> button in the toolbar.
Copies	Shows the number of copies of the instance. (See <b>Notes</b> below.)
Copy	The sequential number assigned to the copy. (See <b>Notes</b> below.)
Initiator	This field indicates the Participant who created the instance
 Has notes	Indicates if any participant has added notes to the instances.
 Has attachments	Indicates if any participant has attached files to the instances.
Creation time	Date and time in which the instance was created.

## Note



Not all these columns may be visible in your instance information panel. Your system administrator determines which columns are displayed. In


addition to these standard column headings, additional column headings which display information associated to the particular business process may be available. Any non-standard column headings are set by your system administrator.

**About copies:** Copies are automatically made of an instance in some processes so that different activities can take place at the same time. Each copy is assigned a sequential number.


**Suspend/Resume** The suspend/resume action is only available if the suspend property is defined in the process design of this activity.

## Actions on the instance.

By clicking the **Process Instance** button  the task is executed.

By clicking the **Assign Instance** button  the instance can be assigned to another participant depending on the permissions the participant has for the roles.

See Assigning an Instance to another participant.

By clicking the **Send Instance** button  the instance can be sent to the next activity.

# Understanding the hierarchy of Work Portal

The layout of Work Portal corresponds to the following hierarchy:

- **View** : A view can be designed to show information on instances, attachments or activities corresponding to global applications. Views are shown as a tree in FuegoBPM user Work Portals. The hierarchy in this tree can also be determined by administrator users when designing views.
- **Instance**: An instance is a single enactment of the business

process. For example, customer Jane Doe from Any Company makes an order from your corporate Internet site on September 20, 2001 at 11:37:40 AM. This action kicks off your XYZ Company Order Fulfillment Process for this particular order. This particular order is called an instance in your process. It is created at a particular moment, starting at a Begin activity in the business process. It will follow the business process based on business rules until it reaches the End activity. An instance occurs only once. Each instance is unique.

- **Task:** A task consists of one or more actions that need to be executed in order to achieve an activity's goal. Most interactive activities contain one or more tasks that the user must execute. Some tasks are mandatory. This means that they must be processed before the instance can be sent to the next step in the business process.

The following examples show how this hierarchy is represented in the **Work Portal** layout.

### Typical view of Work Portal instances panel

The screenshot shows the FUEGO Work Portal interface. The sidebar on the left contains navigation links: Inbox, Applications, \$200, Process Order, Order Review, Attachments, Bookmarks, Consultations, and History. The main panel displays the 'Process Order' instances panel, showing a table of process instances. A red box highlights the 'Instances' section in the sidebar, and a red line points to the 'Views' section.

Description	Activity	State	Participant	Payment type	Order Amount
Flipper Scuba OrderFill10	Check Credit	Running		credit	78.04
Scubapro Dive Shops OrderFill11	Check Freight	Running		credit	250.00
Diving Supply OrderFill12	Ship Product	Running		credit	77.80
Industrial Salvage OrderFill13	Review Order	Running		credit	335.96
Scubapro Dive Shops OrderFill14	Check Credit	Running		credit	300.00

Views

Instances

## Typical view of Work Portal task panel

The screenshot displays the FUEGO Work Portal interface. The top navigation bar includes the logo, user name 'Welcome, John Smith', and links for Search, Options, Help, and Logout. A left sidebar contains a menu with items like Inbox, Applications, \$200, Process Order (selected), Order Review, Attachments, Bookmarks, Consultations, and History. The main content area is titled 'Process Order > Industrial Salvage OrderFill13' and features a toolbar with various icons. Below the toolbar, there are sections for Details, Process Owner Image, Optional applications, a Task list, Notes, and Attachments.

**Details**

Process:	Marine Supply Order Fill	Activity:	Review Order
Priority:	Normal	Status:	Running
Received:	Feb 23, 2005 3:28:20 PM	Deadline:	
Participant:		Copy:	0

**Process Owner Image**

**Optional applications**

Task	Participant	Status	Mandatory	Repeatable	Last execution
Review Order		Pending	✓		
Mail		Pending		✓	

**Notes**

Description	Date	Participant	Activity
xobject.OrderFillExc ... (View)	Feb 23, 2005 3:28:15 PM	John Smith	ReviewOrder

**Attachments**

Name	Version	Creator	Filename	Locked by	Action
No attachments available.					

**Tasks**

# Toolbars









## Instance toolbar



Use these buttons when processing an instance or a group of instances. Take into account that some of them might not be included in the toolbar of your Work Portal since the toolbar can be customized to be limited to the actions you are authorized to perform.

If you consider that you should perform an action and the corresponding button does not appear in the toolbar, contact your system administrator.



### Instance toolbar button descriptions

Button	Description
	<b>Send Instance:</b> Moves the instance to the next activity in the process. Dimmed until all mandatory tasks for an instance at the current activity are processed.
	<b>Send to Instance:</b> Allows you to assign the instance to a specific user.
	<b>Abort Instance:</b> Terminates and deletes an instance. All processing ceases and the instance is removed from the business process.
	<b>Suspend/Resume Instance:</b> Pauses the instance at this activity. To resume the instance and allow it to continue running, click the Resume button. <b>Note</b> : Only available if the suspend property was set for this activity in the process design.
	<b>Select/Unselect Instance:</b> Assigns the instance to you for that activity; blocks other users from processing the instance.
	<b>Back Instance:</b> Allows you to return to the activity where an exception occurred and to continue processing the instance from that point. <b>Note:</b> This button is only available if an exception handler was included in the design of the business process and an exception in the instance invoked the exception handler.
	<b>Grab/UnGrab Instance:</b> Sends an instance to/Releases an instance from a Grab activity. The grab icon, only appears as enabled when you are in a <i>Search for grab</i> view. (See Using the Grab Activity and Grabbing an instance for further information.)
	<b>Bookmark:</b> Work Portal users can bookmark instances and they are displayed in the Bookmark view. Bookmarked instances are set by participant, they are not shared between participants. (See Bookmark View for further information.)








Button	Description
	<b>Consultations:</b> When working with an instance, Work Portal users may need to ask information to other participants about it. Instead of doing it from outside FuegoBPM Work Portal, users are able to make a consultation to other participants for an instance through Work Portal. (See Consultation View for further information.)
	<b>Instance Detail:</b> By clicking on this icon you can view all the detailed information of the instance checked in the instances list. The button is enabled only when a single instance is checked.

## View toolbar

Use these buttons to customize how the information about the instances is displayed for this view.



### View toolbar button descriptions






Button	Description
	Click to create a new view.
	Click to edit the current view.
	Click to delete the current view.
	Click to start presentations window.
	Click to refresh the current view.
	Click to view documentation about the current activity.
	Click to view documentation about the current process.

## Task toolbar

Use these buttons to customize how the information about the tasks for this activity is displayed.



### Task view toolbar button descriptions

Button	Description
	Click to display previous instance.
	Click to refresh the panel.
	Click to see audit trail--all information associated to an instance still active in the process, including events, dates and times, activities and participants. See Working with Audit Trail for further information.
	Click to view documentation about the activity.
	Click to display next instance.

## Refreshing a view

Refreshing a view assures that the most up-to-date information is displayed in Work Portal.

### To refresh a view

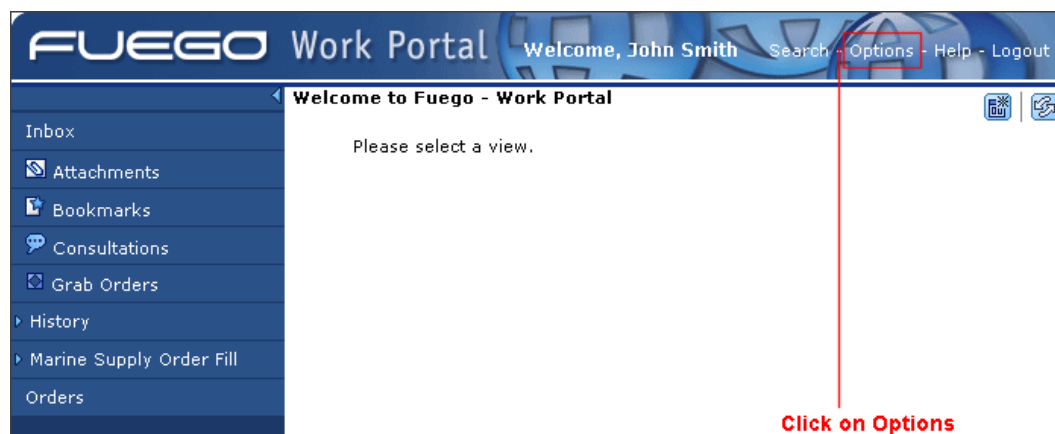
Click on the **Refresh** button  from any window.

## Customizing your Work Portal

You can customize your user information, settings and display options by changing your settings in the Options window.

## To customize your Work Portal

1. Click the **Options** link on the top of your **Work Portal** window.



2. The **Options** window opens. Make changes as deemed appropriate.



Options		Help
<b>User Information</b>		
Full Name:	John Smith	
Login Name:	John Smith	
E-mail:		
<b>Browser settings</b>		
Enable Flash version menu:	<input type="checkbox"/>	
Enable DHTML support:	<input checked="" type="checkbox"/>	
<b>Settings</b>		
Sort instances by:	Priority	
Instances order:	Ascending	
Instances date format:	10:40 AM (1 hour ago), 8 Oct (1 day ago), ...	
Show hidden views:	<input type="checkbox"/>	
Follow the Instance:	<input type="checkbox"/>	
Notify me by e-mail when new instances arrive:	<input type="checkbox"/>	
Keep instance view:	<input type="checkbox"/>	
Enable applet for attachment management:	<input type="checkbox"/>	
Enable remote scripting for FuegoObject presentations:	<input checked="" type="checkbox"/>	
Show applications:	In a folder	
User Working Directory:	/temp/ (Including last path separator, ie.: 'c:\temp\').	
Maximum number of searches in history:	10	
<b>Display options</b>		
Number of instances:	10	
Language:	English	
Country:	United States	
TimeZone:	GMT+01:00	
<input type="button" value="Save"/> <input type="button" value="Close"/>		
FuegoBPM™ - Work Portal		

- Click **Save**. Your changes are saved and you are returned to Work Portal main window with its new settings and display.

## Customization choices available in the Options window

### User Information options

This section displays your full name, login name and e-mail account information. It also allows you to change your password.

- **PASSWORD:** Allows you to change your password. See Changing passwords for further information.

## Browser Settings options

- **Enable Flash version menu:** Selecting this check box changes your left panel navigation menu from the default HTML version to a Macromedia Flash version. Depending on your system and server configuration, you may experience a faster response time if you choose the Flash menu. The Flash menu also provides scroll bars. These are helpful if you are working with many processes or with saved views.

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Process Order** Showing 1-5 of 5

	Description	Activity	State	Participant	Payment type	Order Amount
<input type="checkbox"/>	Flipper Scuba OrderFill10	Check Credit	Activity completed		credit	78.04
<input type="checkbox"/>	Scubapro Dive Shops OrderFill11	Check Freight	Running		credit	250.00
<input type="checkbox"/>	Diving Supply OrderFill12	Ship Product	Running		credit	77.80
<input type="checkbox"/>	Industrial Salvage OrderFill13	Review Order	Running		credit	335.96
<input type="checkbox"/>	Scubapro Dive Shops OrderFill14	Check Credit	Running		credit	300.00

FuegoBPM™ - Work Portal

HTML version

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Process Order** Showing 1-5 of 5

	Description	Activity	State	Participant	Payment type	Order Amount
<input type="checkbox"/>	Flipper Scuba OrderFill10	Check Credit	Activity completed		credit	78.04
<input type="checkbox"/>	Scubapro Dive Shops OrderFill11	Check Freight	Running		credit	250.00
<input type="checkbox"/>	Diving Supply OrderFill12	Ship Product	Running		credit	77.80
<input type="checkbox"/>	Industrial Salvage OrderFill13	Review Order	Running		credit	335.96
<input type="checkbox"/>	Scubapro Dive Shops OrderFill14	Check Credit	Running		credit	300.00

**Flash version**

**Scrollbar**

FuegoBPM™ - Work Portal

### Notes:

1. Your internet browser must have Flash Plug-In Version 5.0 or later to choose the Flash option. This can be downloaded from <http://www.macromedia.com> [<http://www.macromedia.com>.]
2. The Flash Menu only works with browsers that support Live Connect (a browser technology used in the communication between Java Script and other technologies.) The following browsers support LiveConnect:
  - a. Java-enabled Netscape 3.x and 4.x browsers on Macintosh or Windows.
  - b. ActiveX-enabled Microsoft browsers on Win32 (Internet Explorer 3 and above for Windows.) These browsers **do not**

support LiveConnect:

- c. All Macintosh versions of Internet Explorer.
- d. Netscape 6 and 6.01.
- e. Any Java-disabled version of Netscape, including Netscape 2 and earlier. For further information, see:  
*[http://www.macromedia.com/support/flash/ts/documents/mozilla\\_fscommand.htm](http://www.macromedia.com/support/flash/ts/documents/mozilla_fscommand.htm)*

- **Enable DHTML support:** Some Work Portal functions are programmed using dynamic html. If your browser version does not support this technology, you should turn off this option. Work Portal will display some functionality in an alternative way.

### Settings options

- **Sort instances by:** You can select a category by which instances are sorted. This command applies this sorting criteria as the default criteria to every view in your Work Portal that has not been assigned an order.
- **Instances Order:** Choose either Ascending (A-Z) or Descending (Z-A) sort order.
- **Instances date format:** Choose the date format to visualize the instances dates, as the creation time, received time, due date, etc.. For each format you have three options depending on timing. If the date is within the day, within the year or older than a year.
  - **Format 0:** This format always includes, hour, minutes, seconds, day, month and year, i.e.: *8 Oct 10:45:35 AM 1980.*

- Format I: This format includes, hour, minutes, seconds, day, month and year.
  - Within the day: Only shows the hour, i.e: *10:45:35 AM*.
  - Within the year: Shows day, month and hour, i.e.: *8 Oct 10:45:35 AM*.
  - More than a year: Shows day, month and hour, i.e.: *8 Oct 10:45:35 AM 1980*.
- Format II: This format includes, hour and minutes, or day and month, or day, month and year.
  - Within the day: Only shows the hour, i.e: *10:45 AM*.
  - Within the year: Shows day, month and hour, i.e.: *8 Oct*.
  - More than a year: Shows day, month and hour, i.e.: *8 Oct 1980*.
- Format III: This format is like format II but also includes the time in letters, like *2 days ago*.
  - Within the day: Only shows the hour, i.e: *10:45 AM (3 hours ago)*, instance time 10:45 AM, showing time 13:45 AM.
  - Within the year: Shows day, month and hour, i.e.: *8 Oct (1 day ago)*, supposing today is 9 Oct.
  - More than a year: Shows day, month and hour, i.e.: *8 Oct 1980 (24 years ago)*, supposing today is 8 Oct 2004.
- Format IV: This format shows the time only in letters, like *2 days ago*.

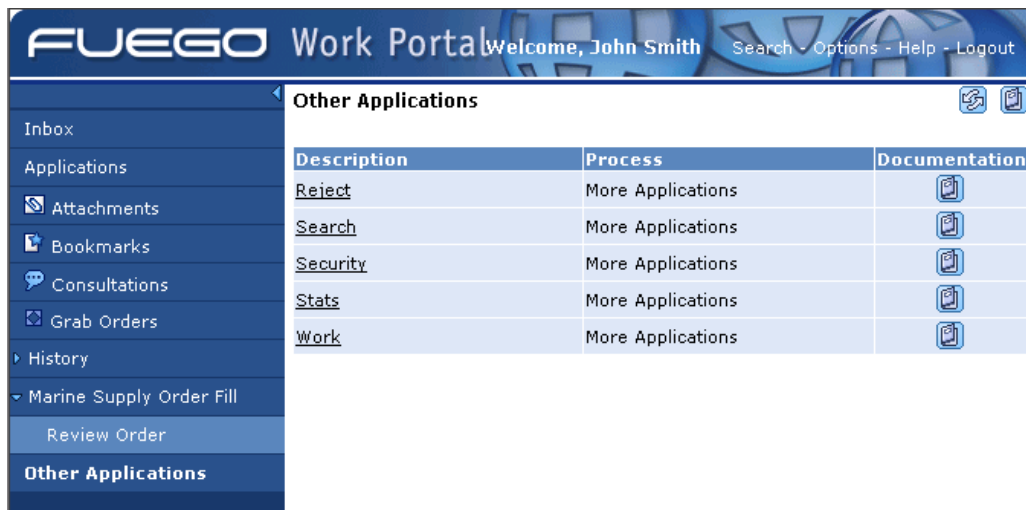
- Within the day, i.e.: *3 hours ago*, instance time 10:45 AM, showing time 13:45 AM.
- Within the year, i.e.: *1 day ago*, supposing today is *9 Oct*.
- More than a year, i.e.: *24 years ago*, supposing instance date as 8 Oct 1980 and today is *8 Oct 2004*.
- Format V: This format shows the time only in letters but more friendly for the same day, the day before and the following day.
  - Within the day: shows *Today*, ie: instance time 10:45 AM, showing time 13:45 AM of the same date.
  - The day before: shows *Yesterday*, ie: instance date *10:45 AM 8 Oct 2004*, showing date *13:45 AM 9 Oct 2004*.
  - The following day: shows *Tomorrow*, ie: instance due date *10:45 AM 10 Oct 2004*, showing date *13:45 AM 9 Oct 2004*.
  - Within the year in the past: shows the time in letters, i.e.: *2 days ago*, supposing instance date *10:45 AM 7 Oct 2004*, showing date *13:45 AM 9 Oct 2004*.
  - In the future but the following day: shows the time in letters, i.e.: *In 2 days*, supposing instance due date *10:45 AM 11 Oct 2004*, showing date *13:45 AM 9 Oct 2004*.
  - More than a year in the past, i.e.: *24 years ago*, supposing instance date as 8 Oct 1980 and today is *8 Oct 2004*.
- **Show hidden views:** Allows you to display views that were

hidden by the system administrator.

- **Follow the Instance:** Allows users to follow the instance in its path within the process. If user completes all the tasks of an activity and has roles in the next activity to be performed, after sending it, Work Portal will keep displaying the task page for the same instance showing the tasks pending process in the following activity.
- **Notify me by e-mail when new instances arrive:** You can choose to receive an e-mail when new instances arrive at your Work Portal.
- **Keep instance view:** Allows you to keep viewing the tasks panel after processing and sending an instance. The task page keeps displaying and it is automatically refreshed with the information of the next pending instance of the current view. This allows the user to improve performance when processing the same task for a large number of instances.
- **Enable the applet for the management of attachments:** You can enable an applet which allows for easier management of attachments. After you enable the applet, when you edit the attachment from Work Portal, the attachment is launched in its appropriate application according to the **File Type / Application Association** settings. For further information, see Launching attachments .
- **Enable remote scripting for Fuego Object presentations:** Fuego Objects HTML Presentation run using JavaScript remote scripting. Remote scripting is available for the Internet Explorer, Mozilla and Netscape browsers. The usage, or not, of these technologies changes the way in which the HTML presentation is refreshed and how the back button behaves. Without using remote scripting, as in any HTML page, the back button goes to the previous page. When the implementation uses remote scripting, there are no new pages in every action. This means that back always works on the same page. The back button returns to

the page from where the task was executed. Others browser, like Konqueror, Opera, etc., always work using reposting.

- **File Type / Application Association:** This option is only enabled when you enable applet for attachments management. Then, this link allows you to associate a file type to a certain application. Work Portal uses the information set here when you click on **View attachment** button after editing and downloading the attachment. The application associated to the attachment's file extension is automatically launched to open the attachment.
- **Show applications:** Allows you to choose how you want applications displayed in Work Portal. There are five choices:
  - **In a folder :** allows you to view the applications only through applications views. Take into account that you might not be able to view applications if Administrator Users did not create any application view for your roles.

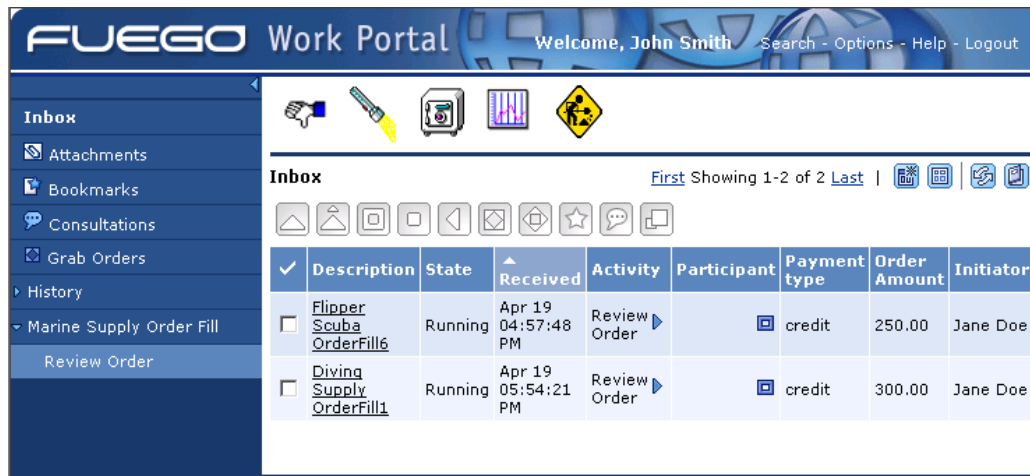


The screenshot shows the FUEGO Work Portal interface. The top header includes the logo, user name 'John Smith', and navigation links. A left sidebar contains a menu with items like 'Inbox', 'Applications', 'Attachments', 'Bookmarks', 'Consultations', 'Grab Orders', 'History', and 'Marine Supply Order Fill'. The main content area is titled 'Other Applications' and contains a table with three columns: 'Description', 'Process', and 'Documentation'.

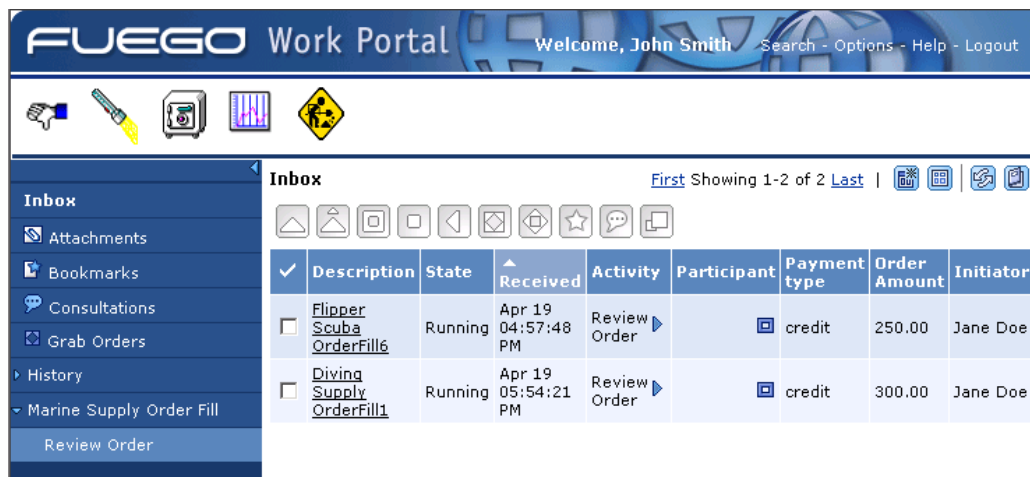
Description	Process	Documentation
<a href="#">Reject</a>	More Applications	
<a href="#">Search</a>	More Applications	
<a href="#">Security</a>	More Applications	
<a href="#">Stats</a>	More Applications	
<a href="#">Work</a>	More Applications	

- **In a toolbar :** a toolbar will appear showing as buttons only those applications belonging to the current view the user is working on.





- **All in a toolbar** : a toolbar showing all the applications that belong to all the available processes will appear on the top of the page.



**Note:** Placing your cursor over an application icon displays a label identifying the application.

- **In the menu** and **All in the menu**: Both options display the applications at the bottom of the views tree in the menu on the left. The former option displays only applications for the view the user is working on. The latter displays the complete set of applications the user has access to perform, no matter which view has been selected.

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Inbox** First Showing 1-2 of 2 Last

✓	Description	State	Received	Activity	Participant	Payment type	Order Amount	Initiator
<input type="checkbox"/>	<a href="#">Flipper Scuba OrderFill6</a>	Running	Apr 19 04:57:48 PM	Review Order ▶	<input type="checkbox"/>	credit	250.00	Jane Doe
<input type="checkbox"/>	<a href="#">Diving Supply OrderFill1</a>	Running	Apr 19 05:54:21 PM	Review Order ▶	<input type="checkbox"/>	credit	300.00	Jane Doe

**Note:** The **Enable Flash version menu** check box (see below) must be cleared (not selected) for these options to work.

- **Refresh after:** This option is only enabled if administrator users decide that automatic refresh is needed. For those cases, you can set your Work Portal to automatically refresh at a specific interval. This allows you to immediately know whenever new instances arrive at your work queue without having to click first the Refresh button.
- **User Working Directory:** You can change the working directory where you would like attachments to be placed for editing.
- **Automatic login:** this property is enabled only if the participant has chosen to **Enable automatic login** when he/she logged into the Work Portal. To disable the automatic login, unselect this property.
- **Maximum number of searches in history:** Choose the maximum number of searches to display under a new folder called "Search" in the left panel of your Work Portal. Once the maximum number of searches set here has been reached, the

following search will cause the oldest search to be removed.

## Display Options

- **Number of instances:** Choose the total number of instances for a view to be displayed on your screen at the same time.
- **Language:** Select the language you want to display.
- **Country:** Change Work Portal display so that it corresponds to unique parameters set for each country, such as language variations, date/time conventions and local currency.
- **TimeZone:** Choose your local time zone. If you select the option **ResetTimeZone**, the current time in the machine is set. When you click the **Save** button it is set. For example, if your machine has the time set as GMT-3, when you reopen the **Options** dialog it will be set as *GMT-3* too.

### Tip



If you do not see the change you have just made, try clicking the **RefreshView** button



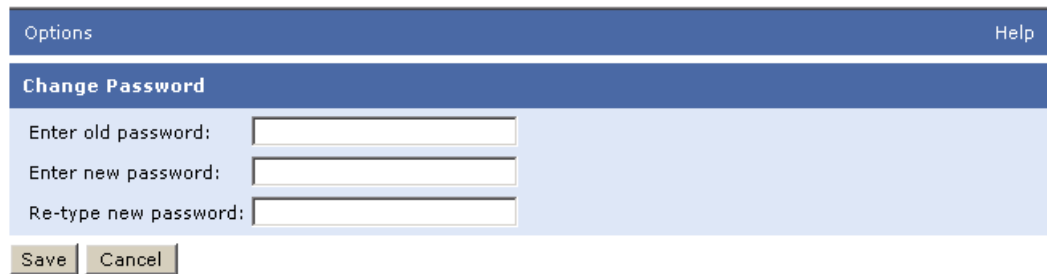
## Changing Passwords

Work Portal prompts you to change the password that had been initially assigned the first time you log in. If you have never logged into Work Portal before, your password is your User name.

After the first login, Work Portal allows you to change your password whenever you want by using the **Options** link.

### To change your password


1. Click the **Options** link above the instances panel of your Work Portal. The " **Options** " window appears.
2. In the **User Information** section of the window, click **Change Password**. The **Change Password** window appears.




The screenshot shows a web interface window titled 'Options' with a 'Help' link in the top right corner. Below the title bar is a section header 'Change Password'. Under this header, there are three text input fields labeled 'Enter old password:', 'Enter new password:', and 'Re-type new password:'. At the bottom of the form are two buttons: 'Save' and 'Cancel'.

3. Type your old password, type your new password and then re-type the new password.
4. Click **Save**. The **Options** window appears.
5. Click **Close** to return to the **Work Portal** instances panel.

### Note

 If you re-type the new password incorrectly, you are prompted to type the new password again.

## Error Messages

When there is an error associated to the action you are trying to take, the **Error** icon  appears on the top right corner of your Work Portal workspace. At the same time, a short description of each error is displayed in the lower portion of Work Portal workspace. If you select the check box to the right of the error message, you can see a more detailed message. For example, if a view brings instances from two servers and one server is down, the **Error** icon appears on the top right corner of Work Portal workspace and an error/warning message about the other disabled server appears at the bottom of

the workspace.

Example:

Applications		
Description	Process	Documentation
<div> <div>Description</div> <div>The applications of the process '/OrderFill#Default-1.0' are not available.</div> </div>		

To view a more detailed error message,

- Select the check box on the error message row.

**Example:**

Applications		
Description	Process	Documentation
<div> <div>Description</div> <div>The applications of the process '/OrderFill#Default-1.0' are not available.</div> </div>		
Process '/OrderFill#Default-1.0' not available.		<input checked="" type="checkbox"/>

To close a detailed view of an error message,

- Clear the check box on the error message row.

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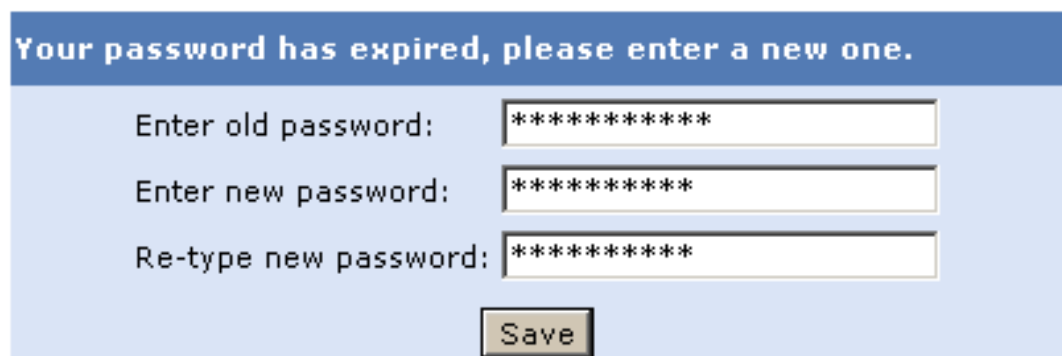
# Chapter 4. Basics Steps for processing an Instance

## Logging on to Work Portal

The very first time you log on to Work Portal using FuegoBPM Express, you will be prompted to change the initial value assigned to your password.

### To log on to Work Portal for the first time

1. Obtain Work Portal URL as well as a user name and password from your system administrator.
2. Enter the User Name and the password. Remember that the initial value for the password is also the User Name you have been given. So, in both User Name and password fields, enter your User Name.
3. FuegoBPM then prompts you to enter a new password. In the old password, remember that you must enter your user name.



**Your password has expired, please enter a new one.**

Enter old password:

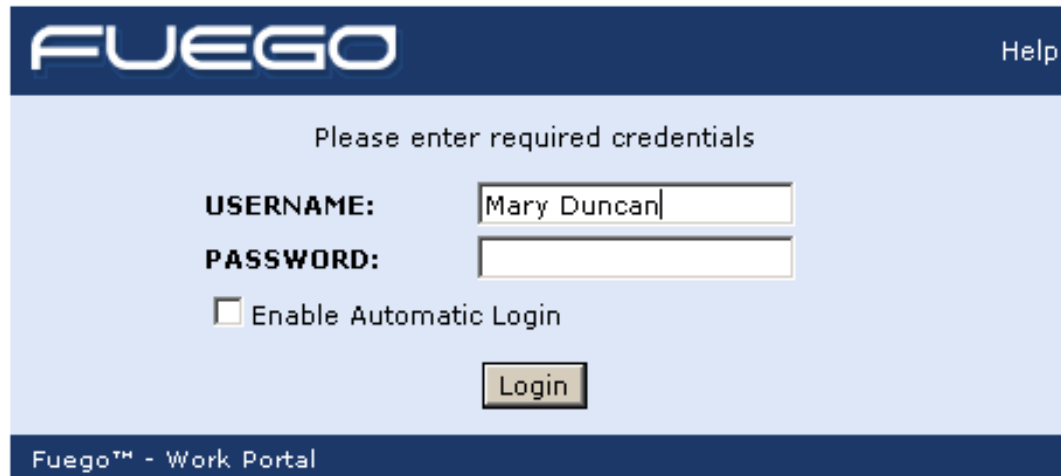
Enter new password:

Re-type new password:

The following time you access Work Portal or if you have let it sit idle for some time, you will need to log in with the user name and the password set the first time.

### To log on to Work Portal

1. Type the URL for Work Portal into your browser and press **Enter**. The **Login** dialog box appears.



The screenshot shows a web browser window displaying the FUEGO Work Portal login interface. At the top, there is a dark blue header with the word "FUEGO" in white and a "Help" link on the right. Below the header, the text "Please enter required credentials" is centered. The login form contains two input fields: "USERNAME:" with the text "Mary Duncan" and "PASSWORD:". Below these fields is a checkbox labeled "Enable Automatic Login". A "Login" button is positioned below the checkbox. At the bottom of the form, there is a dark blue footer with the text "Fuego™ - Work Portal".

2. Type your username and password. Passwords are case sensitive.
3. Select the **Enable Automatic Login** check box if you want to save your user name and password. The next time you access Work Portal you are not going to be prompted for login information. To disable this option, once you are logged in to the Work Portal, select the Options menu and unselect the Automotic Login check box. For more details, see Customizing your Work Portal.
4. Click **Login** .

### Tip



The URL address typically follows this format: `http://localhost:9595/workportal/` where: *localhost* is the machine name, *9595* is the port number, and *workportal* is the Internet alias where the FuegoBPM servlet server is located.

## Creating an Instance

Creating an instance starts the instance on its journey through the

business process. Depending upon how a business process is designed in FuegoBPM Studio, an instance may be created automatically. For example, a business may use a web-based form or application that automatically creates an instance in the process when submitted by the customer. In other services, an individual such as a customer services representative or a sales order clerk may be authorized to create an instance and start it through the process. Contact your system administrator if you are not sure about having the authority to create instances.

In the example shown below, Jane Doe has been assigned a "customer" role. This allows her to manually initiate an instance in the Marine Supply Order Fill service by clicking the Create Order task.

### **To create an instance**

Depending on how **Applications layout** option is set, do one of the following:

1. If you selected the **In the menu** as a **Show Application** layout option in the **Options** window, navigate in your Work Portal to the icon corresponding to the application to create a new instance in the menu. In the example shown here, this initial task is called Create Order.
2. Otherwise, click on the applications view corresponding to the process in which you have to create instances. Or click on the proper icon in the toolbar if the selected options is **In A toolbar** or **All in a toolbar**.

### **Example**



## Basics Steps for processing an Instance

**FUEGO Work Portal** Welcome, Jane Doe Search - Options - Help - Logout

**Inbox** Showing 1-2 of 2

	Description	Activity	State	Participant	Payment type	Order Amount
<input type="checkbox"/>	<a href="#">Scubapro Dive Shops OrderFill11</a>	Check Freight	Running		credit	250.00
<input type="checkbox"/>	<a href="#">Diving Supply OrderFill12</a>	Ship Product	Running		credit	77.80

FuegoBPM™ - Work Portal

Click here to create a new instance

In this example, the **Order electronic form** appears.

### Example:

**FUEGO Work Portal** Welcome, Jane Doe Search - Options - Help - Logout

Customer:

Customer Type:  Payment Type:

	Item	Item Price	Item Quantity	Total
1	<input type="text" value="Item1020"/>	21.45	<input type="text" value="1.00"/>	21.45
Total				21.45

submit refresh cancel

FuegoBPM™ - Work Portal


In this case, Jane should fill in the required information and click **submit** button. The instance is created and appears in the **Inbox** view of the users in charge of executing the tasks corresponding to the first activity of the process. In this example, the first activity is **Review Order**.

### Example

The screenshot shows the FUEGO Work Portal interface. The top header includes the FUEGO logo, 'Work Portal', a welcome message 'Welcome, John Smith', and links for 'Search - Options - Help - Logout'. The left sidebar contains a navigation menu with items like 'Inbox', 'Order \$200', 'Process Order', 'Order Review', 'Attachments', 'Bookmarks', 'Consultations', 'History', 'Create Order', and 'Workload'. The main content area is titled 'Order Review' and shows a table of order review items. The table has columns for 'Description', 'Activity', 'State', 'Participant', 'Payment type', and 'Order Amount'. Two items are listed: 'Industrial Salvage OrderFill13' and 'Diving Supply OrderFill15', both in 'Running' state with 'credit' payment type.

Description	Activity	State	Participant	Payment type	Order Amount
Industrial Salvage OrderFill13	Review Order	Running		credit	335.96
Diving Supply OrderFill15	Review Order	Running		credit	21.45

## Note

 You can determine how your created instance tasks (referred to in Work Portal as applications) are displayed on your Work Portal in the **Options** window. Choose the desired option from the **Show applications** drop-down list. See Customizing your Work Portal for further information.

A **Not Started** folder is created for global creation activities in which the auto-complete option has been turned off in the process design. This allows for the adding of notes and attachments before an instance starts through the business process. If a **Not Started** folder is displayed in the left panel of your Work Portal, you must follow the steps in the Using the Not Started folder help topic.

# Processing an Instance

As an instance flows through a business service, each end user processes the instance by completing the tasks assigned to his/her folder. When you process an instance within an activity, you normally complete one or more tasks. Once all mandatory tasks show a completed status, you send the instance to the next activity in the business process. Anyone assigned to the role for such next activity is then able to process it. Alternatively, you can send the instance to a particular user as long as they are assigned to the role for that activity.

## To process the main task of an instance

1. Click on one of the views of the views' tree displayed on the left. The view name turns bold.
2. When a view is italicized, it means that a new instance has arrived and you have not yet selected the view. Although the new instance might already have been processed by some other user, the view remains italicized until you select it. If this is the case, when you select it, no new instances will be shown. Click on an italicized view. All instances for this view are displayed in the right panel of the window. **Example:**



**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Inbox** Showing 1-5 of 5

	Description	Activity	State	Participant	Payment type	Order Amount
<input type="checkbox"/>	Diving Supply OrderFill15	Review Order	Running		credit	21.45
<input type="checkbox"/>	Scubapro Dive Shops OrderFill14	Check Credit	Running		credit	300.00
<input type="checkbox"/>	Diving Supply OrderFill12	Ship Product	Running		credit	77.80
<input type="checkbox"/>	Scubapro Dive Shops OrderFill11	Ship Product	Running		credit	250.00
<input type="checkbox"/>	Industrial Salvage OrderFill13	Review Order	Running		credit	335.96

FuegoBPM™ - Work Portal

Active view is bold

3. Click on  icon to process the instance. The main task designed for the current activity is executed.
4. You can also click on the instance **Description** . In this case, the detailed information page displays the list of tasks for the current activity below the instance. The list includes the main task and other optional tasks that could have been designed. Click the process  icon to execute the tasks in the order you need.

## Basics Steps for processing an Instance

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Inbox > Diving Supply OrderFill15**

**Details**

Process:	Marine Supply Order Fill	Activity:	Review Order
Priority:	Normal	Status:	Running
Received:	Feb 23, 2005 5:19:25 PM	Deadline:	
Participant:		Copy:	0

**Process Owner Image** **Optional applications**

**Process Definition Image:**

Task	Participant	Status	Mandatory	Repeatable	Last execution
Review Order		Pending	✓		
Mail		Pending		✓	




**Notes**

Description	Date	Participant	Activity
No notes available.			

**Attachments**

Name	Version	Creator	Filename	Locked by	Action
No attachments available.					

**Click to execute the task**


- Click the **Notes**  and **Attachments**  buttons to add notes and attachments. Click the (View) file link in the **Description** column to view any notes. Click the file link in the **Name** column to view any attachments.
- Click the **Process Task** button  shown to the right of the task name in the **Task** column. Enter any information for which you are prompted. Notice that a toolbar on top of the execution page allows you to execute optional tasks from here. You also have the options to enter attachments and notes and to execute global applications. Finally click the **appropriate** button to finish the execution of the task. **Example:**

The screenshot shows the FUEGO Work Portal interface. At the top, it says 'FUEGO Work Portal' and 'Welcome, John Smith'. There are links for 'Search', 'Options', 'Help', and 'Logout'. Below this, there's a task panel for 'Diving Supply' with a 'Customer Type' of 'commercial' and a 'Payment Type' of 'credit'. A table lists items with columns 'Item', 'Item Price', 'Item Quantity', and 'Total'. The table has one row with 'item1010' at a price of 10.00 and a quantity of 230.00, resulting in a total of 2300.00. At the bottom of the table, it says 'Total 2300.00'. There are buttons for 'submit', 'refresh', and 'cancel'. In the top right corner, there are buttons for 'Mail' and 'Workload'. A red line points from the text 'Optional tasks' to these buttons.

Item	Item Price	Item Quantity	Total
1 item1010	10.00	230.00	2300.00
Total			2300.00

7. If the activity has been designed as autocomplete, as in this case, since the only **Mandatory** task has already been performed, the instance is automatically sent to the next activity.

## Note



 The **Follow the Instance** option in the **Options** window allows you to follow an instance along its route through a process. With this option selected, once you display the Work Portal task panel, you can execute all the tasks for a particular instance and then send them on to the next activity in the process. The same task panel remains showing the same instance, but now the instance is in another activity awaiting processing. All mandatory tasks for an activity must be processed before you can send the instance to the next activity.

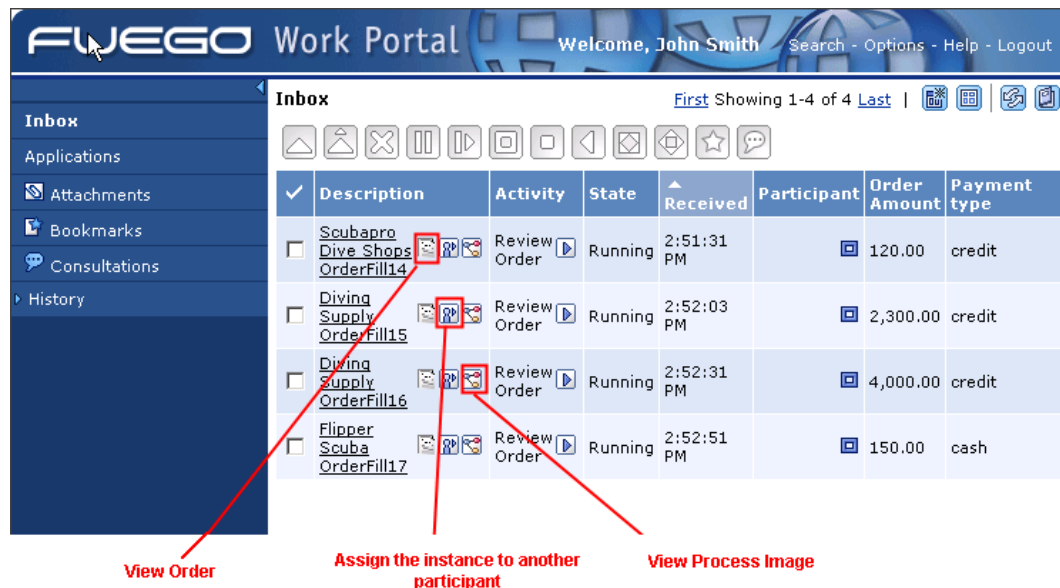
If the **Autocomplete** option has been selected in the process design for an activity and the Item execution preferences have been set to true in your portal.properties file, once you have completed processing all mandatory tasks for the instance, the instance will be automatically sent to the next activity and the next task in that activity will be automatically executed. This allows you to continue

working on an instance without having to use the left panel of your workspace to navigate to a new view.

Select the **Keep instance view** check box in the **Options** window if you want the next instance in the queue to automatically appear in your task view panel for processing.

## Optionals

1. Click the **Process Image**  button, if present in the instance columns or in the instance detail window, to view the image of the process with process information attached to it. For further details refer to **In Business Monitoring**.
2. Click the other icons displayed, in the example below, the "View Order" task, to process functional actions designed for the process instance.
3. Click the **Assign Instance** button, , to assign the instance to other participant in the role. This option only appears if your permissions are defined to do so. For further details refer to **Assigning an Instance to another participant**.



**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout



**Inbox** First Showing 1-4 of 4 Last

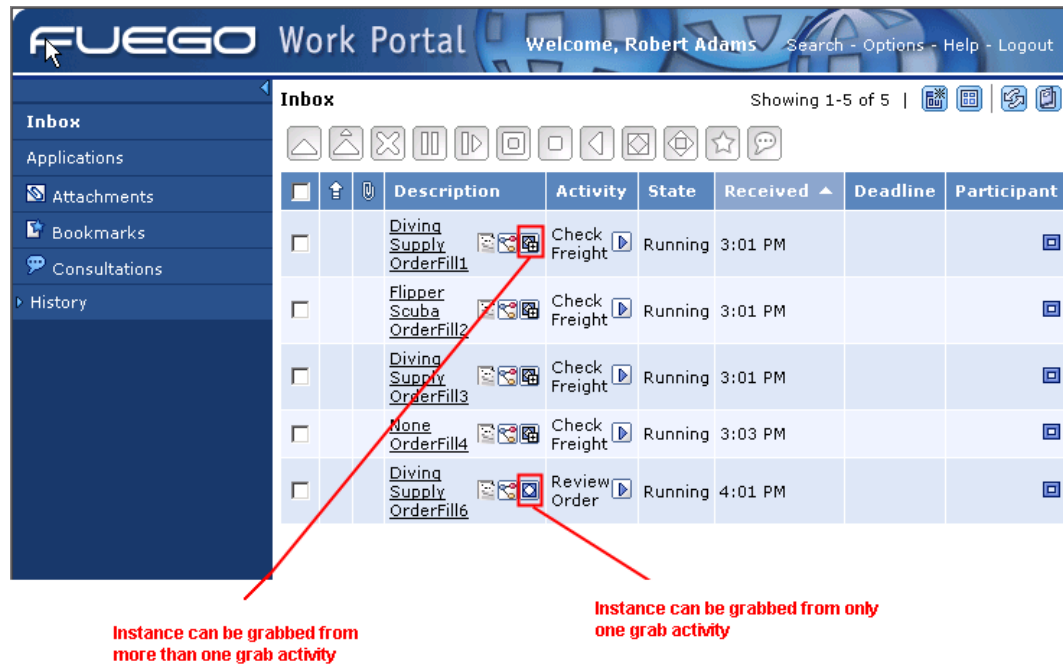
	Description	Activity	State	Received	Participant	Order Amount	Payment type
<input checked="" type="checkbox"/>	Scubapro Dive Shops OrderFill14	Review Order	Running	2:51:31 PM	<input type="checkbox"/>	120.00	credit
<input type="checkbox"/>	Diving Supply OrderFill15	Review Order	Running	2:52:03 PM	<input type="checkbox"/>	2,300.00	credit
<input type="checkbox"/>	Diving Supply OrderFill16	Review Order	Running	2:52:31 PM	<input type="checkbox"/>	4,000.00	credit
<input type="checkbox"/>	Flipper Scuba OrderFill17	Review Order	Running	2:52:51 PM	<input type="checkbox"/>	150.00	cash

View Order

Assign the instance to another participant

View Process Image



- Click the **Grab Instance** button  / , to grab the instance as shown in the picture below. Refer to **Grabbing an Instance** for details.



## Processing Instances in a batch

Although the tasks for each instance must be processed individually, you can execute other operations for a batch of two or more instances. For example, once you have completed all the tasks for a group of instances, you can send them on to the next activity in a batch.

### To process two or more instances in a batch

- From the instances panel, select the instance by checking the toggle check box  next to each instance you want to include in the batch. To select all the instances displayed in the instances panel, click the **Toggle Selection** button 

2. Click the appropriate button in the toolbar. **Example:**

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout


**Marine Supply Order Fill > Inbox** Showing 1-5 of 5

	Description	Activity	State	Participant	Payment type	Order Amount
<input checked="" type="checkbox"/>	Diving Supply OrderFill15	Check Credit	Activity completed		credit	21.45
<input checked="" type="checkbox"/>	Scubapro Dive Shops OrderFill14	Check Credit	Activity completed		credit	300.00
<input type="checkbox"/>	Diving Supply OrderFill12	Ship Product	Running		credit	77.80
<input type="checkbox"/>	Scubapro Dive Shops OrderFill11	Ship Product	Running		credit	250.00
<input type="checkbox"/>	Industrial Salvage OrderFill13	Review Order	Running		credit	335.96

**Step 2: Click the Send instance button to send them as a batch**

**Step 1: Select the instances you want to send to the next activity**


## Note

 Buttons in the toolbar that appear dim after you select two or more instances are unavailable for batch processing or are not available for all the instances in the batch. For example, you will be able to Select (assign to yourself) a batch of instances only if all those instances are unselected. Available options are preset during process design and configuration. Consult your system administrator for further information on what batch processing options are available.

# Sending an Instance to the next activity

Once an instance for an activity has been processed, it must be sent to the next activity in order to continue the flow of the business process.

To send the instance to the next activity

- From the task panel for the instance you want to send, click the **Send Instance** button  in the toolbar.



## Basics Steps for processing an Instance

### Example:

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Inbox > Diving Supply OrderFill15**

**Details**

Process:	Marine Supply Order Fill	Activity:	Check Credit
Priority:	Normal	Status:	Activity completed
Received:	Feb 23, 2005 5:57:18 PM	Deadline:	
Participant:		Copy:	0

**Process Owner Image** **Optional applications**

Process Definition Image:

Task	Participant	Status	Mandatory	Repeatable	Last execution
Check Credit		Completed	✓		John Smith (Feb 23, 2005 5:57:27 PM)
Review Order		Pending		✓	

**Notes**

Description	Date	Participant	Activity
xobject.OrderFillExc ... (View)	Feb 23, 2005 5:50:13 PM	John Smith	ReviewOrder


**Attachments**

Name	Version	Creator	Filename	Locked by	Action
No attachments available.					

FuegoBPM™ - Work Portal

Click the Send instance button to send the instance to the next activity in the process

- or -

- From the instance panel, select the check box in the check column ☒ next to the instance you want to send to the next activity. Click the **Send Instance** button  in the toolbar.

### Example:

## Basics Steps for processing an Instance

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Inbox** Marine Supply Order Fill > Inbox Showing 1-5 of 5

Order \$200

Process Order

Order Review

Attachments

Bookmarks

Consultations

History

Create Order

Workload

FuegoBPM™ - Work Portal

		Description	Activity	State	Participant	Payment type	Order Amount
<input checked="" type="checkbox"/>		Diving Supply OrderFill15	Check Credit	Activity completed		credit	21.45
<input checked="" type="checkbox"/>		Scubapro Dive Shops OrderFill14	Check Credit	Activity completed		credit	300.00
<input type="checkbox"/>		Diving Supply OrderFill12	Ship Product	Running		credit	77.80
<input type="checkbox"/>		Scubapro Dive Shops OrderFill11	Ship Product	Running		credit	250.00
<input type="checkbox"/>		Industrial Salvage OrderFill13	Review Order	Running		credit	335.96

Step 2: Click the Send instance button to send them as a batch

Step 1: Select the instances you want to send to the next activity

# Chapter 5. Working with Activities Instances and Tasks

## Understanding task information columns

When you click an instance description in the instance information pane, the task information pane for that instance appears.

**Example:**

The screenshot displays the EGO Work Portal interface. At the top, it says 'Welcome, John Smith' and includes links for 'Search - Options - Help - Logout'. The main content area is titled 'Inbox > Diving Supply OrderFill6'. Below this title is a row of icons for various actions. The 'Details' section contains a table with the following information:




Process:	Marine Supply Order Fill	Activity:	Review Order
Priority:	Normal	Status:	Activity completed
Received:	Dec 28, 2004 4:01:27 PM	Deadline:	
Participant:		Copy:	0

Below the details section are two more sections: 'Process Owner Image' and 'Optional applications'. The 'Process Definition Image' section shows a small icon. The 'Task' section contains a table with the following information:

Task	Participant	Status	Mandatory	Repeatable	Last execution
Review Order		Completed	✓		jsmith (Dec 28, 2004 10:21:56 PM)
Mail		Pending		✓	

Below the task section is a 'Notes' section with a table that has the following columns: 'Description', 'Date', 'Participant', and 'Activity'. The text 'No notes available.' is displayed. The 'Attachments' section also has a table with the following columns: 'Name', 'Version', 'Creator', 'Filename', 'Locked by', and 'Action'. The text 'No attachments available.' is displayed.

### Task Info Column Descriptions


Column Name	Description
Details	Summary of instance information.
Process Owner Image	Click the <b>Process Image</b>  button, if present in the instance columns or in the instance detail window, to view the image of the process with process information attached to it. For further details refer to In Business Monitoring.
Optional Applications	Click the <b>Assign Instance</b> button,  , to assign the instance to other participant in the role. This option only appears if your permissions are defined to do so. For further details refer to Assigning an Instance to another participant. Or, click the other icons displayed, in the example below, the "View Order" task, to process functional actions designed for the process instance.
Task	Task file name. Clicking on the <b>Process Task</b> button executes the task.
Participant	Click on the <b>Select Instance</b> button  in this column or on the toolbar to select the instance.
Status	Displays one of the following: <b>Pending/Selected:</b> Pending: Task awaiting processing by you <b>Selected:</b> Task has been selected by someone else and is awaiting processing by that person. <b>Executing:</b> Task being processed. <b>Completed:</b> Task has been

Column Name	Description
	processed and instance has been sent to next activity.
Mandatory	Checked if task must be processed before the instance can be sent to the next activity.
Repeatable	Checked if the task can be processed more than once before sending the instance to the next activity.
Last Execution	Displays the participant, date and time for the task's last execution

At the bottom of the page, information of Notes and Attachments is displayed.


## Viewing documentation

When a process is developed, process designers have the possibility to document the guidelines for the process and for each activity within the process. The documentation entered when the process is designed can be viewed from Work Portal so that users can better understand how to proceed when performing tasks.

Using the **View Documentation** button  you can view documentation for activities or processes.

### To view documentation for a process

When you select a view in the **Views tree** displayed in the menu, an icon to see the documentation of the processes associated to that view appears on the top right toolbar. A window will display with the list of processes associated to the view, based on the instances and version of processes in it. Each possible process documentation appears as a link in the window. Clicking the link the process documentation window is opened.

- Click the **View Documentation: Process** button  at the top right corner of the instance information panel.

## Example



**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Marine Supply Order Fill > Inbox** Showing 1-5 of 5 |   

		Description	Activity	State	Participant	Payment type	Order Amount
<input type="checkbox"/>		Diving Supply OrderFill15	Check Credit	Activity completed		credit	21.45
<input type="checkbox"/>		Scubapro Dive Shops OrderFill14	Check Credit	Activity completed		credit	300.00
<input type="checkbox"/>		Diving Supply OrderFill12	Ship Product	Running		credit	77.80
<input type="checkbox"/>		Scubapro Dive Shops OrderFill11	Ship Product	Running		credit	250.00
<input type="checkbox"/>		Industrial Salvage OrderFill13	Review Order	Running		credit	335.96

FuegoBPM™ - Work Portal

View Process Documentation button

## To view documentation for an activity

If the current view is an **Activity Instances** view, two icons appear at the top right corner of the instance information panel: one for the process documentation and other for the activity documentation.

If no **Activity Instances** views are available, you can go to the instance detail page. At the top right corner of this page, the documentation icon appears and allows you to see the documentation of the activity where the instance is currently running.

- Click the **View Documentation: Activity** button  to see the **activity** documentation.

## Working with Activities Instances and Tasks

The screenshot shows the FUEGO Work Portal interface. The top navigation bar includes the FUEGO logo, 'Work Portal', a welcome message for John Smith, and links for Search, Options, Help, and Logout. A left sidebar contains navigation links: Inbox, Order \$200, Process Order, Order Review, Attachments, Bookmarks, Consultations, History, Create Order, and Workload. The main content area displays details for the 'Diving Supply OrderFill12' activity instance. It includes a toolbar with various icons, a 'Details' section with fields for Process, Priority, Received, Participant, Activity, Status, Deadline, and Copy, a 'Process Owner Image' and 'Optional applications' section, a 'Task' table, a 'Notes' section, and an 'Attachments' section. A red vertical line is drawn on the right side of the interface, pointing to a 'View Documentation Activity button' located below the screenshot.

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Inbox > Diving Supply OrderFill12**

**Details**

Process:	Marine Supply Order Fill	Activity:	Ship Product
Priority:	Normal	Status:	Running
Received:	Feb 23, 2005 2:34:22 PM	Deadline:	
Participant:		Copy:	0

**Process Owner Image** **Optional applications**

**Process Definition Image:**

Task	Participant	Status	Mandatory	Repeatable	Last execution
Ship Product		Pending	✓		

**Notes**

Description	Date	Participant	Activity
No notes available.			

**Attachments**

Name	Version	Creator	Filename	Locked by	Action
No attachments available.					

FuegoBPM™ - Work Portal

View Documentation Activity button

2. The documentation is displayed in a new window

The screenshot shows a documentation window titled 'Marine Supply Order Fill > Check Credit > Documentation'. The window contains the following text:

Ensure that the **amount of the Order** being checked does not exceed the credit granted to the customer.

Afterwards, verify the customer credit history for the last 10 orders .

## Following an instance

If you are authorized to complete two or more activities in a process, you will find the **Follow the Instance** option useful. Selecting this option in the **Options** window allows you to follow an instance along its route through a process. Once you have displayed Work Portal task panel, you can execute all the tasks for a particular activity and then send them on to the next activity in the process without having to leave the task panel. The task panel remains displayed after you have completed all mandatory tasks and sent the instance to the next activity. Then, the next activity appears.

### Note



If you do not select the Follow the Instance option, after you complete all mandatory tasks and send the instance on the next activity, you return to Work Portal instances panel.

If an instance is split and goes to two or more activities simultaneously, you will not be able to use this option.

### Example

A role in a process has the ability to perform two sequential activities in the same process. After processing the first activity, the instance is complete and ready to be sent to the next activity.



## Working with Activities Instances and Tasks

The screenshot displays the FUEGO Work Portal interface. The top navigation bar includes the FUEGO logo, 'Work Portal', a welcome message for Robert Adams, and links for Search, Options, Help, and Logout. A left sidebar contains navigation links: Inbox, Applications, Attachments, Bookmarks, Consultations, and History. The main content area is titled 'Inbox > Diving Supply OrderFill15' and features a toolbar with various icons. Below the toolbar, the 'Details' section shows metadata for the task instance: Process (Marine Supply Order Fill), Priority (Normal), Received (Feb 24, 2005 9:08:42 AM), Participant, Activity (Check Freight), Status (Activity completed), Deadline, and Copy (0). A table below this lists task execution details with columns for Task, Participant, Status, Mandatory, Repeatable, and Last execution. The first row shows 'Check Freight' completed by Robert Adams. The 'Notes' section contains a single entry with a description, date, participant, and activity. The 'Attachments' section shows no attachments are available.

**Details**

Process:	Marine Supply Order Fill	Activity:	Check Freight
Priority:	Normal	Status:	Activity completed
Received:	Feb 24, 2005 9:08:42 AM	Deadline:	
Participant:		Copy:	0

Task	Participant	Status	Mandatory	Repeatable	Last execution
Check Freight		Completed	✓		Robert Adams (Feb 24, 2005 9:13:16 AM)

**Notes**

Description	Date	Participant	Activity
xobject.OrderFillExc ... (View)	Feb 23, 2005 5:50:13 PM	John Smith	ReviewOrder

**Attachments**

Name	Version	Creator	Filename	Locked by	Action
No attachments available.					

After the user clicks on **Send** button, the Instance Detail page keeps on displaying the same instance that is now in the next activity in the process ready to be executed.

## Working with Activities Instances and Tasks

The screenshot shows the FUEGO Work Portal interface. The top header includes the FUEGO logo, 'Work Portal', and a welcome message for Robert Adams. A navigation bar on the left lists 'Inbox', 'Applications', 'Attachments', 'Bookmarks', 'Consultations', and 'History'. The main content area displays the 'Inbox > Diving Supply OrderFill15' activity instance. It includes a toolbar with various icons, a 'Details' section with a table of activity information, a 'Task' table, a 'Notes' section, and an 'Attachments' section.

**Details**

Process:	Marine Supply Order Fill	Activity:	Ship Product
Priority:	Normal	Status:	Running
Received:	Feb 24, 2005 9:15:02 AM	Deadline:	
Participant:		Copy:	0

**Task**

Task	Participant	Status	Mandatory	Repeatable	Last execution
Ship Product		Pending	✓		

**Notes**

Description	Date	Participant	Activity
xobject.OrderFillExc ... (View)	Feb 23, 2005 5:50:13 PM	John Smith	ReviewOrder

**Attachments**

Name	Version	Creator	Filename	Locked by	Action
No attachments available.					

### To choose the Follow the Instance option

1. Click the **Options** link on the top of your Work Portal window. The **Options** window opens.
2. Select the **Follow the Instance** check box.

Options		Help
<b>User Information</b>		
Full Name:	Robert Adams	
Login Name:	Robert Adams	
E-mail:		
<b>Browser settings</b>		
Enable Flash version menu:	<input type="checkbox"/>	
Enable DHTML support:	<input checked="" type="checkbox"/>	
<b>Settings</b>		
Sort instances by:	Priority	
Instances order:	Ascending	
Instances date format:	10:40 AM, 8 Oct, 8 Oct 1980	
Show hidden views:	<input type="checkbox"/>	
Follow the Instance:	<input checked="" type="checkbox"/> <b>Select the Follow the Instance option</b>	
Notify me by e-mail when new instances arrive:	<input type="checkbox"/>	
Keep instance view:	<input type="checkbox"/>	
Enable applet for attachment management:	<input type="checkbox"/>	
Enable remote scripting for FuegoObject presentations:	<input checked="" type="checkbox"/>	
Show applications:	In a folder	
User Working Directory:	/temp/ <small>(Including last path separator, i.e.: 'c:\temp\').</small>	
Maximum number of searches in history:	10	
<b>Display options</b>		
Number of instances:	10	
Language:	English	
Country:	United States	
TimeZone:	GMT+01:00	
<input type="button" value="Save"/> <input type="button" value="Close"/>		
FuegoBPM™ - Work Portal		

3. Click **Save** button and close the options window.

## Searching for instances

Work Portal's search options allow you to quickly find specific instances. This is helpful if you have many instances displayed in your Work Portal and you need to find a certain instance. Search options also allow you to set a range of conditions for search. For example, you could search a process for all instances within an activity that have today's date as a deadline or by order amount,

company, product or any other variable defined in the process. The combinations of search conditions that you can specify to find instances are almost unlimited. You can also search for instances in multiple processes.

You can search for instances assigned to you or to others. Likewise, it is possible to search for instances that have already finished the process execution successfully or with an exception status.

### **To search for instances**

1. Click Search at the top of the main Work Portal window. The **Search Options** window appears.

Search Options Help

Search Clear Close

**✓ Processes**

<input type="checkbox"/> nonParametricRoles	<input checked="" type="checkbox"/> Marine Supply Order Fill
<input type="checkbox"/> usingParametricRoles	

**Filter Options**

Get Instances Assigned To: All

Case Sensitive Matching: ☐

**Include Instances**

<input checked="" type="checkbox"/> In process	<input type="checkbox"/> Completed	<input type="checkbox"/> Aborted
--	------------------------------------	----------------------------------


**Conditions**

Match all of the following ☒

**Add Condition:** Activity +

State Is Grabbed ☐ Is parametric -

Search Clear Close

**Filter Description** 

(State Is Grabbed)

FuegoBPM™ - Work Portal

2. Under the **Processes** section, select each process you want to search.
3. Under the **Filter Options** section, choose the appropriate options. The first popup displays the options to filter instances depending on the participant the instances are currently assigned to. The checkbox below applies only if you include filter conditions on attributes which values are strings of characters such as Description, it indicates whether the value set for the attribute must match with case sensitive criteria or not.

**Filter Options**

Get Instances Assigned To: All

Case Sensitive Matching: All

**Include Instances**

☒ In process ☐ Completed ☐ Aborted

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.
My Roles (including assigned to other participants)	Shows the instances assigned to any participant that belongs to any of the same roles of the participant logged in the Work Portal.
My Roles (WITHOUT including assigned to other participants)	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.

- Include Instances** section gives you the possibility to perform the search among the instances that are currently in process and/or among instances that already finished the process execution with status aborted or completed. Default value is set to **In Process** and this is also the value automatically set when none of the three possibilities is checked. Take into account that searches over completed or aborted instances might take long depending on the amount of instances already completed that are stored in the database. Notice that when **In Process** is not checked, you are not allowed to filter instances by Activity nor by

Status since the completed or aborted instances cannot be in any other activity than the End of the process.

## Warning



If you are searching for aborted or completed instances, make sure you choose the option **All** in the combo **Get instances assigned to**. Otherwise, instances will not be found since, when aborted or completed, they are in an automatic role.

5. Under the **Conditions** section you can add one or more conditions to filter instances. Check the **Match all of the following** checkbox if the instances you are looking for must match all the conditions and uncheck it if one of the defined conditions is enough. To add a new condition to the conditions list you have to choose an attribute from a popup list and then, depending on the kind of attribute selected you will be prompted to choose an appropriate comparison connector and the value to compare the attribute with. Choose an instance attribute from the **Add Condition** list. The list includes not only standard columns displayed in Work Portal instances panel but also those instance variables declared as external by the process designers. Set the condition as parametric if you are building a parametric search. See section *Parametric search* below.

---

**Add Condition:**

Activity

+

State

Is

☐ Is parametric

Search

Clear

Activity

Activity deadline

Approved

Copy

Creation time

Deadline

Description

Discount

Has attachments

Has notes

Initiator





**Filter Description**

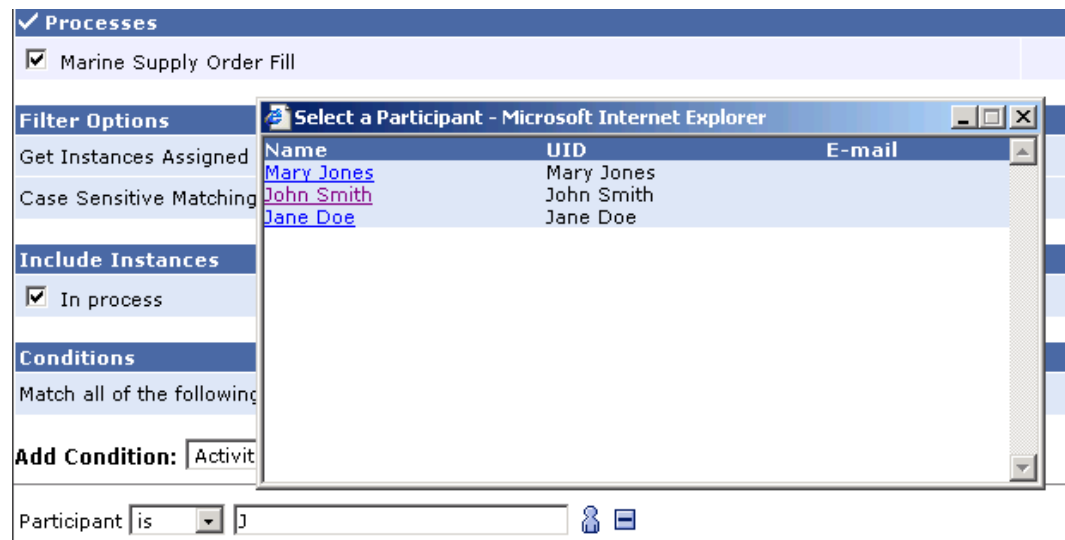
(State Is Grabbed)

FuegoBPM™ - Work Portal

For further information on how to combine conditions, see

Connector Rules.

6. Click  to add the condition to the conditions list. Then, complete the data of the condition at will. Repeat the last two steps for additional conditions.
7. Click  to toggle between a calendar date and time to Now +  
/- time condition.
8. Click  next to a condition you want to remove.
9. For the participant condition, you can search for participants matching a partial name: Enter the partial name and click . The list of participants whose name match the entered partial name are displayed in a new window. Select the participant you are searching for by clicking on the name.



10. Click the **Search** button. All instances that meet your criteria are displayed below the time of the search. A description of the search filter appears beneath the search results. Notice that the search result is displayed in pages. Consequently, you might need to press on **Next** link to see the complete list of instances matching the specified conditions. The number of instances displayed in each page depends on the value set to the option.



**Number of instances** in the **Options** window. From the search results, you can click on one of the instances description to go to the instance detail page. If you have permissions to grab any of the instances in the search result list, the grab icon is displayed next to the instance description. For further details, see [Grabbing instances](#) .

Add Condition: Activity +

Order Amount Greater Than  ☐ Is parametric ▢

9:07:35 AM Showing 1-3 of 3

		Description		State	Activity	Participant	Payment type	Order Amount
Normal		<a href="#">Flipper Scuba OrderFill12</a>		Running	Review Order		cash	20.00
Normal		<a href="#">Scubapro Dive Shops OrderFill13</a>		Running	Check Freight		cash	880.60
Normal		<a href="#">Flipper Scuba OrderFill11</a>		Running	Review Order		credit	14.35

Search Clear Close

Filter Description

(Order Amount Greater Than 10)

FuegoBPM™ - Work Portal

11. The search filter is automatically saved as a view in the left panel of Work Portal under a new category called **Search**. This view is named for the time the search was made. These views are deleted when you log out.

## Note

You can save a search result by editing the temporary view automatically created. Once you have edited and saved the search view, it will remain in your Work Portal even though you log out.

## Note

Instances that are in activities beginning with **WMN\_** are those copies

that are waiting for another copy synchronization. They are waiting for a copy to be executed in a dependent activity of the one in which it is.

## Parametric search

If you are building a parametric search, at least one condition will have to be defined as parametric.

1. Once you built all the conditions of your search and set those required as parametric. And set the value to the parametric attribute if you knew it.

Search Options Help

**Processes**

☐ nonParametricRoles ☒ Marine Supply Order Fill

☐ usingParametricRoles

**Filter Options**

Get Instances Assigned To:

Case Sensitive Matching: ☐

**Include Instances**

☒ In process ☐ Completed ☐ Aborted

**Conditions**

Match all of the following ☒

Add Condition:

Payment type   ☒ Is parametric

Order Amount   ☐ Is parametric

**Filter Description**

(Order Amount Greater Than 5) and (Payment type Contains cas)

FuegoBPM™ - Work Portal

2. Click the *Search* button. The instances that fulfill the conditions are displayed.

## Working with Activities Instances and Tasks

**Conditions**

Match all of the following ☒

**Add Condition:** Activity  +

Payment type   ☒ Is parametric

Order Amount   ☐ Is parametric

5:20:22 PM Showing 1-2 of 2

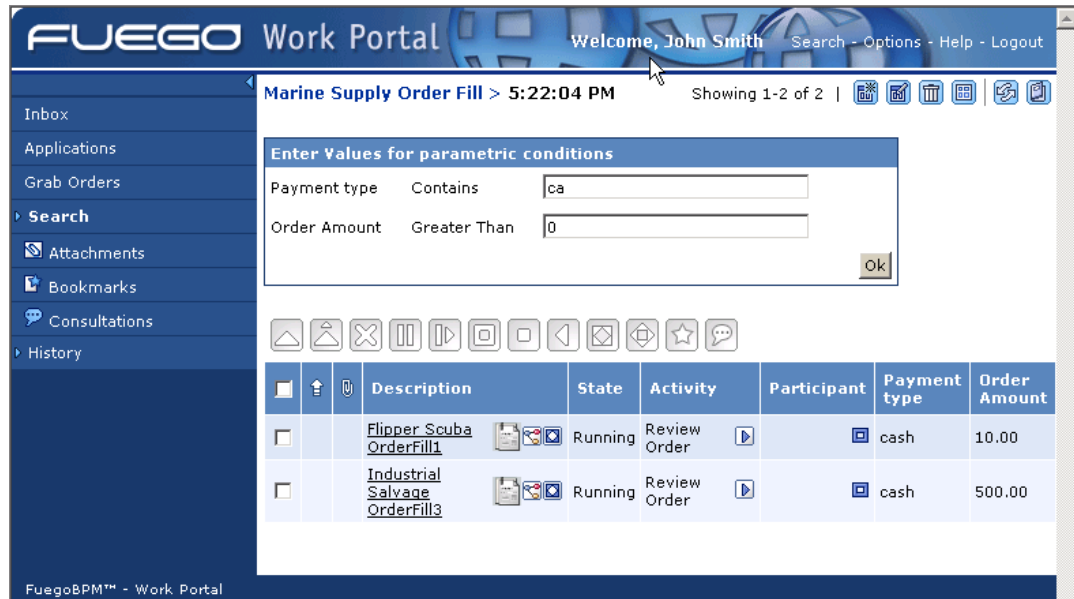
		Description		State	Activity	Participant	Payment type	Order Amount
Normal		<a href="#">Flipper Scuba OrderFill1</a>		Running	Review Order		cash	10.00
Normal		<a href="#">Industrial Salvage OrderFill3</a>		Running	Review Order		cash	500.00

**Filter Description**

(Order Amount Greater Than 5) and (Payment type Contains cas)

FuegoBPM™ - Work Portal

3. When you close the Search window, the Work Portal main panel, will be set to a view, showing:
  - the conditions set as parametric so you can change and execute the search again,
  - and the instances that corresponds to that search.




## Advanced search features

You can perform searches across multiple processes even if the server for one of the selected processes is not running. You can also search for instances assigned to others. Once the search results are displayed in the lower portion of the **Search Options** window, you can process any of retrieved instances. When you click on an instance displayed in the **Search Options** window, the task panel for the instance is displayed.

Each time you click the **Search** button in the **Search Options** window, a temporary view is created to keep a history of the searches made in the current session. The view is named for the exact time the search was made. This temporary view is displayed in the left panel of Work Portal under a new view called **Search**. You can set the maximum number of searches you want displayed in the **Options** window. These views are deleted when you log out.

### Note

 Use the **Options** window to set the maximum number of searches you want displayed. Once that maximum has been reached, the oldest search is

deleted every time you make a new search.

## Connector Rules

If more than a condition for the same attribute (for example, Severity) is defined within a Filter, they will be connected to resolve the complete condition. This is accomplished using the logical operators OR and AND. Each connector is classified into a type and based on the combination of the same or different type, the **OR** or **AND** applies.

### Classification I

Description	Connector
Is	+
Is not	-
Contains	+
Not contains	-

Using the above connectors, the following rules apply:

Connector	Connector	Operator	Description
+	+	OR	The combination of two types of + will be connected by an OR
+	-	AND	The combination of one type + and another type - will be connected by an AND
-	+	AND	The combination of one type "-" and another type

Connector	Connector	Operator	Description
			+ will be connected by an AND
-	-	AND	The combination of two types of "-" will be connected by an AND

## Examples

Conditions	explanation
Severity is Debug / Severity is Info	Both conditions use the "is" connector, therefore results displayed in the Log Viewer will contain a severity of DebugORInfo
Severity is not Debug/ Severity is not Info	Both conditions use the "is not" connector, therefore results displayed in the Log Viewer will contain a severity of DebugANDInfo

## Classification II

- Begin with: B
- End with: E
- Before: *lower than* sign.
- After: *greater than* sign.
- Lower than: *lower than* sign.

- Higher than: *greater than* sign.

Using the above connectors, the following rules apply:

- B, B: OR - The combination of two types of **B** will be connected by an OR
- B, E: AND - The combination of one type **B** and another type **E** will be connected by an AND
- E, B: AND - The combination of one type **E** and another type **B** will be connected by an AND
- E, E: OR - The combination of two types of **E** will be connected by an OR
- *lower than, lower than*: AND - The combination of two types of *lower than* will be connected by an AND
- *lower than, greater than*: OR (OI) - The combination of one type *lower than* and another type *greater than* will be connected by an OR
- *greater than, lower than*: AND (CI) - The combination of one type *greater than* and another type *lower than* will be connected by an AND
- *greater than, greater than*: AND - The combination of two types of *greater than* will be connected by an AND

## Examples



Conditions	explanation
Message Begins with "The server" / Message Ends with "successfully"	The conditions will be combined using AND.
Level Higher than 2 / Level Lower than 5	The conditions will be combined using AND (CI).

# Saving search results



After searching for instances as described in Searching for Instances, a temporary view is created and given the name of the time at which the search was performed. These views are temporary and available only in the current session. This means that if the user logs out, the next time he or she relogs in to Work Portal, search results will not be available.

In the cases where you need to search for instances matching a certain criteria repeatedly, it might result very useful to save a search result as a permanent view.

## Note

 In some processes, the functionality to save views may be limited to the current session or not provided at all. If this is the case, the **Edit View** button  does not appear. Check with your system administrator.

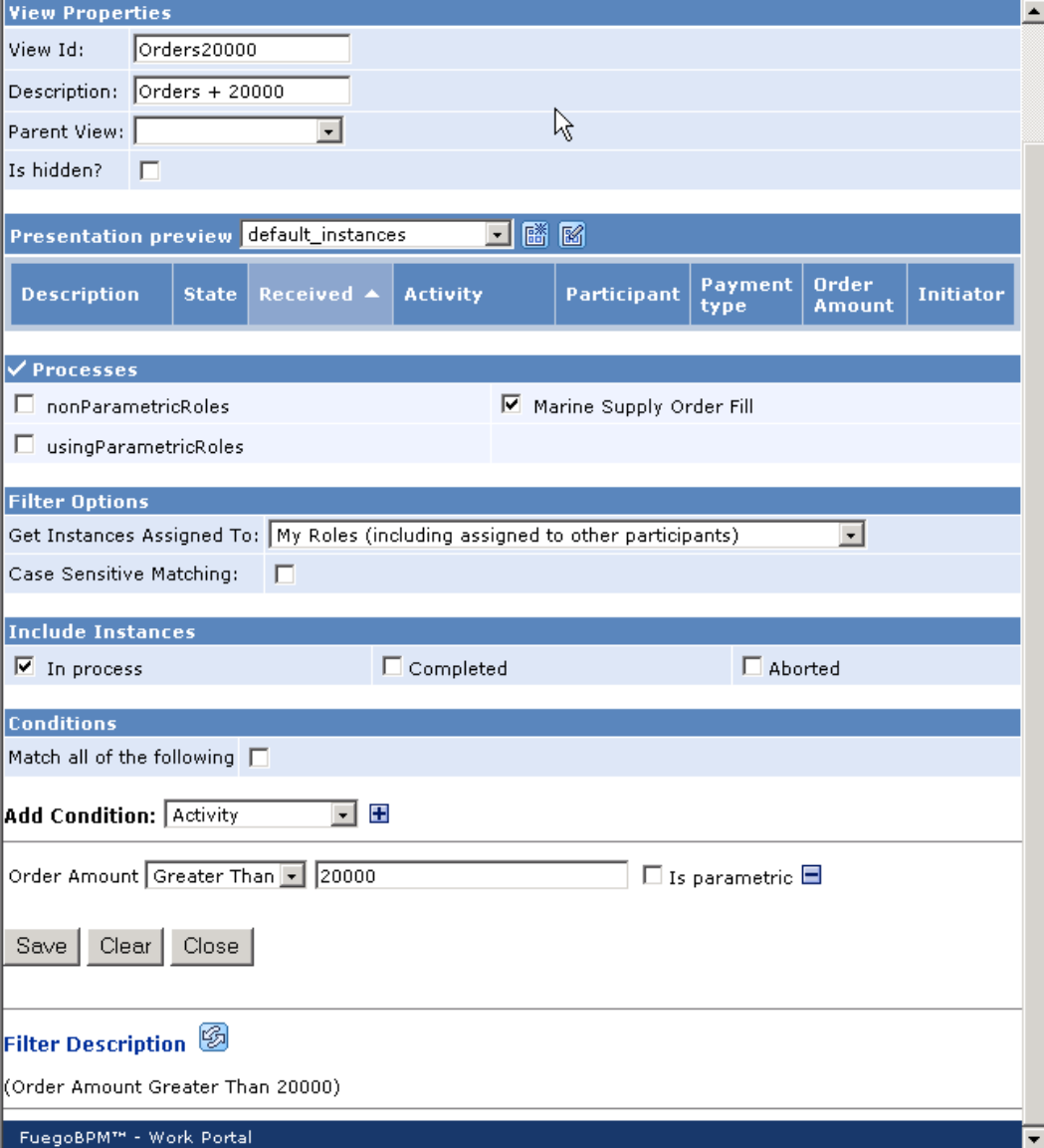
To save search results

1. Click the search temporary view in the Views tree displayed in the menu on the left.
2. Click the **Edit View** button  to the left of the search time in the Search Options window. The **Edit view** window appears. Use the **Edit View** button  to rename and save search results view.
3. Replace the name automatically given to the temporary view with a short name in the **View Id** box. Do not use any non-alphanumeric characters: (Not allowed: \ / , \$ ; + ' ").
4. Type a short description in the **Description:** box. This description will appear in your Work Portal.
5. Select from the **Parent View:** list the category under which you



want the description of the view to appear in the left panel of Work Portal main window.

6. If you wish, introduce changes at will as described in Editing a View





**View Properties**

View Id:

Description:

Parent View:

Is hidden? ☐

**Presentation preview**   

Description	State	Received	Activity	Participant	Payment type	Order Amount	Initiator
-------------	-------	----------	----------	-------------	--------------	--------------	-----------

**Processes**

☐ nonParametricRoles ☒ Marine Supply Order Fill

☐ usingParametricRoles

**Filter Options**

Get Instances Assigned To:


Case Sensitive Matching: ☐


**Include Instances**


☒ In process ☐ Completed ☐ Aborted

**Conditions**

Match all of the following ☐

**Add Condition:**  

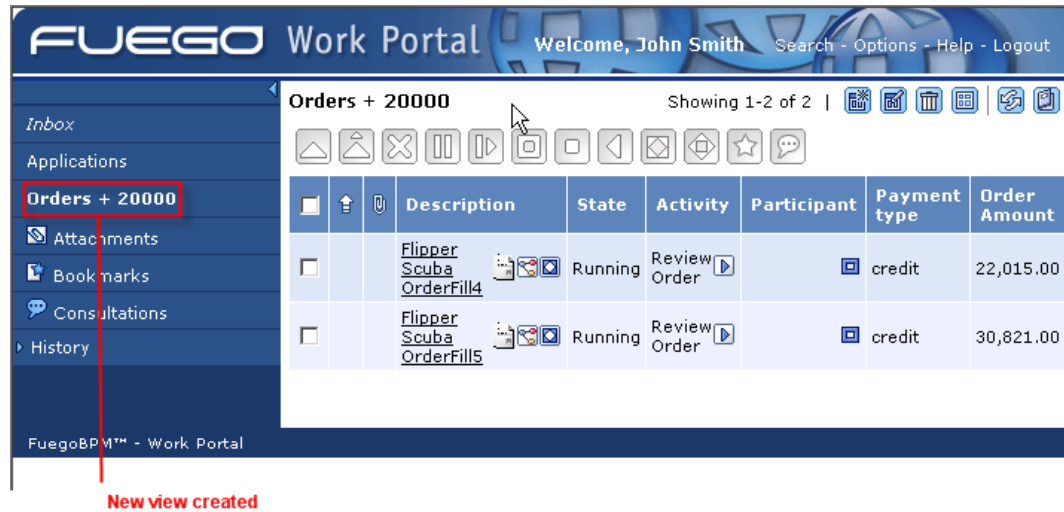
Order Amount   ☐ Is parametric 

**Filter Description** 

(Order Amount Greater Than 20000)

FuegoBPM™ - Work Portal

7. Click **Save** and then click **Close** and the view appears in the Views menu .

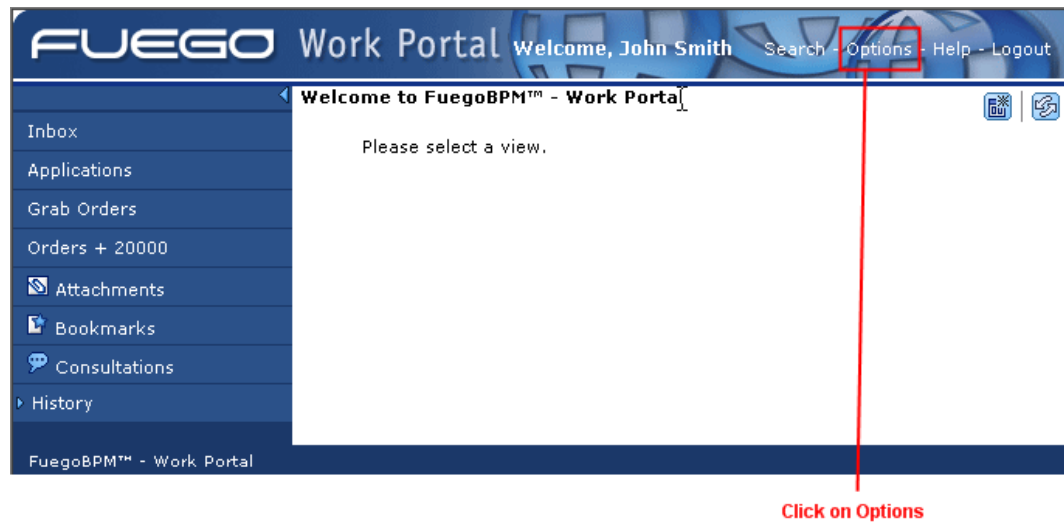


## Using e-mail with Work Portal

You can choose to receive an e-mail whenever a new instance arrives in your Work Portal.

To receive an e-mail each time an instance arrives at your Work Portal

1. Click the **Options** link on the top of your Work Portal window. The **Options** window opens:




2. Select the **Notify me by e-mail when new instances arrive** check box.

Options		Help
User Information		
Full Name:	John Smith	
Login Name:	John Smith	
E-mail:		
Browser settings		
Enable Flash version menu:	<input type="checkbox"/>	
Enable DHTML support:	<input checked="" type="checkbox"/>	
Settings		
Sort instances by:	Payment type	
Instances order:	Ascending	
Instances date format:	10:40 AM, 8 Oct, 8 Oct 1980	
Show hidden views:	<input type="checkbox"/>	
Follow the Instance:	<input type="checkbox"/>	
Notify me by e-mail when new instances arrive:	<input checked="" type="checkbox"/>	Enable Check box
Keep instance view:	<input type="checkbox"/>	
Enable applet for attachment management:	<input type="checkbox"/>	
Enable remote scripting for FuegoObject presentations:	<input checked="" type="checkbox"/>	
Show applications:	In a folder	
User Working Directory:	/temp/	
	(Including last path separator, ie.: 'c:\temp\').	
Maximum number of searches in history:	10	
Display options		
Number of instances:	10	
Language:	English	
Country:	United States	
TimeZone:	GMT-03:00	
<input type="button" value="Save"/> <input type="button" value="Close"/>		
FuegoBPM™ - Work Portal		

- Click **Save**, then **Close** . Next time an instance arrives at your Work Portal and you are not logged-in, you will be notified by an e-mail.

## Note

 For this option to work, your e-mail address must be displayed in the e-mail box in the User Settings section of the Options window. If this box is


blank or if the e-mail address is incorrect, contact your system administrator.

## Using the Not Started Folder

A **Not Started** folder is created for global creation activities in which the auto-complete option has been turned off in the process design. This allows you to add attachments to an instance *before* it reaches the first activity in a process.

If a **Not Started** folder is displayed in the left pane of your Work Portal, you must perform the following steps before it is sent to the next activity in the process.

To send a created instance to the first activity in a process

1. Click the **Not Started** folder.
2. Click the instance description. Review the instance for completeness and accuracy. If necessary, attach files.
3. Click the **Send Instance** button  in the toolbar.

The instance is sent to the first activity in the process.

## Sending an Instance to an Individual

When there are several persons assigned to a particular role and you want just one of those persons to process a certain instance, you can send the instance just to that person. For example, an order might exceed an individual's credit limit and you need to send the order to the customer's account representative for special consideration.

To send an instance to an individual


1. After you have processed the instance to an activity, click the

**Send To Instance** button  in the toolbar. The **Send To** dialog box appears.




2. Select an activity from the drop-down box. If only one activity is available, it is automatically selected and you cannot change it.
3. Select a participant from the drop-down box.
4. Click the **Send** button. The instance is sent to the person you specified and you are returned to the previous window.


### Note

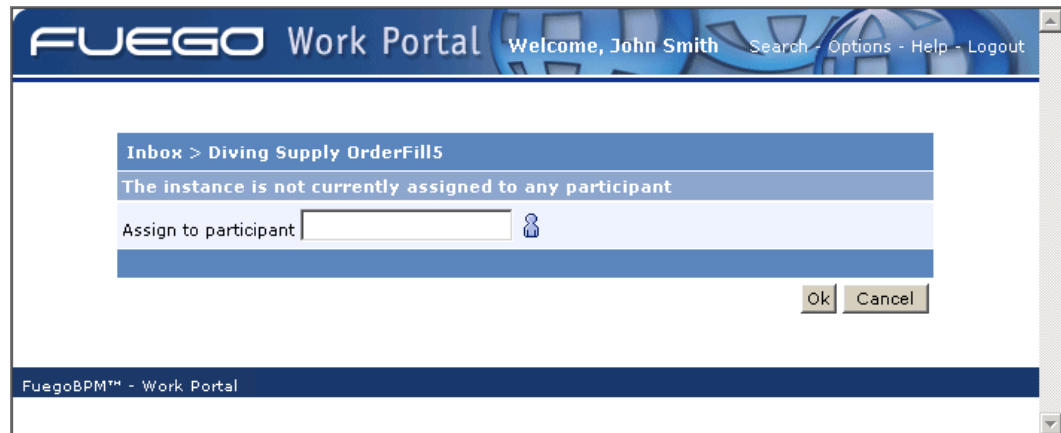
 Only users assigned to the role responsible for this activity are listed in the drop-down box.

## Assigning an Instance to another participant delegation, escalation & peer assignment

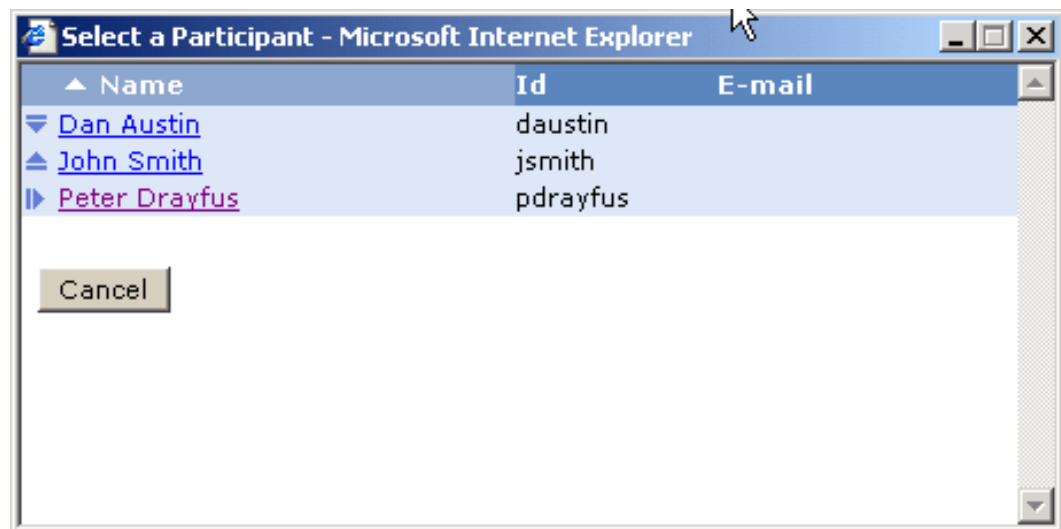
When the participant selects an instance and in the first information column of the instance the **Assign Instance** button  is displayed, it means that the participant is allowed to assign that instance to another participant in the same role, by applying "escalation, delegation or peer assignment" permissions.

## To Assign the Instance

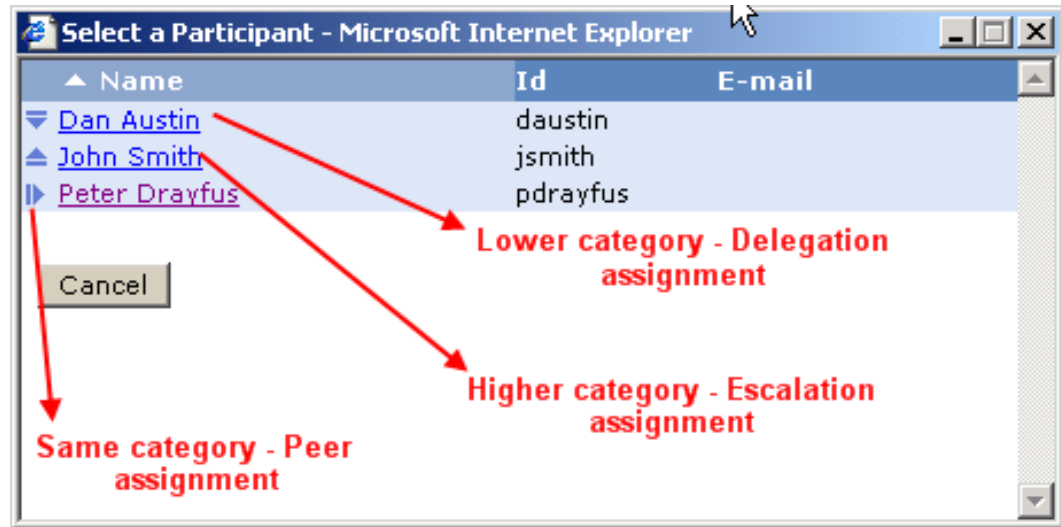
1. Select the instance to yourself. Click the **Assign Instance** button . The following window displays.



2. Click the **Select Participant** button . The **Select a Participant** dialog displays.





3. The participants to whom you can assign the instance are listed. Beside each participant's name, an icon shows the relationship between the participant and you.




4. Select the participant or click **Cancel**. Once the participant has been selected click **OK**. The instance is now assigned to that participant and you no longer see it in your Work Portal.

## Selecting-Unselecting an Instance

Clicking the **Select Instance** button  assigns you an instance for the current activity. Nobody else can process this activity until you click on the **unSelect Instance** button .

### To select an instance


- From the task panel for the instance you want to select, click the **Select Instance** button  in the toolbar.



## Working with Activities Instances and Tasks

The screenshot shows the FUEGO Work Portal interface. The top navigation bar includes 'FUEGO Work Portal', 'Welcome, John Smith', and links for 'Search', 'Options', 'Help', and 'Logout'. The left sidebar contains a menu with 'Inbox', 'Applications', 'Grab Orders', 'Orders + 20000', 'Attachments', 'Bookmarks', 'Consultations', and 'History'. The main content area displays the 'Inbox > Flipper Scuba OrderFill12' instance. A toolbar at the top of the instance panel contains several icons, with the 'Select Instance' button (a square with a smaller square inside) highlighted by a red box. Below the toolbar, the 'Details' section shows a table with instance information: Process (Marine Supply Order Fill), Activity (Review Order), Priority (Normal), Status (Running), Received (Feb 22, 2005 5:09:27 PM), Deadline, Participant, and Copy (0). The 'Process Owner Image' and 'Optional applications' sections are also visible. A 'Task' table lists tasks with columns for Task, Participant, Status, Mandatory, Repeatable, and Last execution. The 'Notes' section shows a list of notes with columns for Description, Date, Participant, and Activity. The 'Attachments' section shows a table with columns for Name, Version, Creator, Filename, Locked by, and Action. A red line points from the 'Select Instance' button to the 'Status' column of the task list.

Click the Select Instance button to assign the instance to yourself and block others

- From the instance panel, select the check box in the check column next to each instance you want. Click the **Select Instance** button  in the toolbar.

## Working with Activities Instances and Tasks

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout


**Inbox** Showing 1-3 of 3

		Description	State	Activity	Participant	Payment type	Order Amount
<input checked="" type="checkbox"/>		Flipper Scuba OrderFill12	Running	Review Order		cash	20.00
<input type="checkbox"/>		Scubapro Dive Shops OrderFill13	Running	Check Freight		cash	880.60
<input type="checkbox"/>		Flipper Scuba OrderFill11	Running	Review Order		credit	14.35

**Step 1: Select the Instance**

**Step 2: Click the Select Instance button in the toolbar**

or

- Click the **Select Instance** button  in the participant column of the instance.


**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Inbox** Showing 1-3 of 3

		Description	State	Activity	Participant	Payment type	Order Amount
<input checked="" type="checkbox"/>		Flipper Scuba OrderFill12	Running	Review Order		cash	20.00
<input type="checkbox"/>		Scubapro Dive Shops OrderFill13	Running	Check Freight		cash	880.60
<input type="checkbox"/>		Flipper Scuba OrderFill11	Running	Review Order		credit	14.35

**Select the instance**



### To unselect an instance

1. From the task panel for the instance you want to unselect, click the **unSelect Instance** button  in the toolbar.
2. From the instance panel, select the check box in the check column next to the instance you want to unselect.


or

1. Click the **unSelect Instance** button in the toolbar.

## Suspending-Resuming an Instance

Clicking the **Suspend Instance** button  allows you to pause the instance at this activity. Nobody else can process the instance at this activity until you click the **Resume Instance** button .

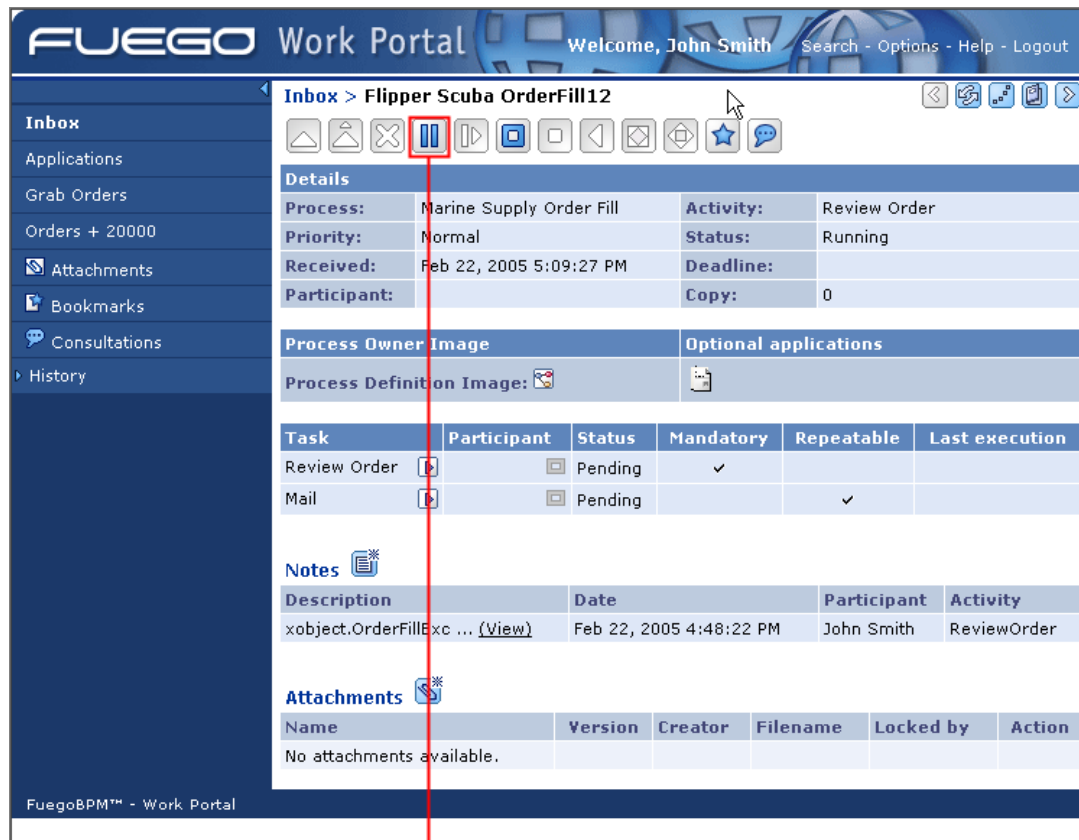
### Note

 This function is available only if the suspend property was defined for this activity in the process design. To find out more, contact your system administrator.

### To suspend an instance

- From the task panel for the instance you want to suspend, click the **Suspend Instance** button  in the toolbar.

## Working with Activities Instances and Tasks



**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Inbox > Flipper Scuba OrderFill12**

**Details**

<b>Process:</b>	Marine Supply Order Fill	<b>Activity:</b>	Review Order
<b>Priority:</b>	Normal	<b>Status:</b>	Running
<b>Received:</b>	Feb 22, 2005 5:09:27 PM	<b>Deadline:</b>	
<b>Participant:</b>		<b>Copy:</b>	0

**Process Owner Image** **Optional applications**

**Process Definition Image:**

Task	Participant	Status	Mandatory	Repeatable	Last execution
Review Order		Pending	✓		
Mail		Pending		✓	

**Notes**


Description	Date	Participant	Activity
xobject.OrderFillExc ... (View)	Feb 22, 2005 4:48:22 PM	John Smith	ReviewOrder

**Attachments**

Name	Version	Creator	Filename	Locked by	Action
No attachments available.					

FuegoBPM™ - Work Portal

Click the Suspend Instance button to pause the instance at an activity and prevent other from processing it

- From the instance panel, select the check box in the check column next to the instance you want to suspend. Click the **Suspend Instance** button  in the toolbar.

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout



**Inbox** Showing 1-3 of 3

		Description	State	Activity	Participant	Payment type	Order Amount
<input checked="" type="checkbox"/>		Flipper Scuba OrderFill12	Running	Review Order		cash	20.00
<input checked="" type="checkbox"/>		Scubapro Dive Shops OrderFill13	Running	Check Freight		cash	880.60
<input type="checkbox"/>		Flipper Scuba OrderFill11	Running	Review Order		credit	14.35


**Step 1: Select the instances you want to Suspend**

**Step 2: Click the Suspend Instance button**


## To resume an instance

- From the task panel for the instance you want to resume, click the **Resume Instance** button  in the toolbar.
- From the instance panel, select the check box in the check column next to the instance you want to resume. Click the **Resume Instance** button  in the toolbar.


## Sending an Instance back to previous activity

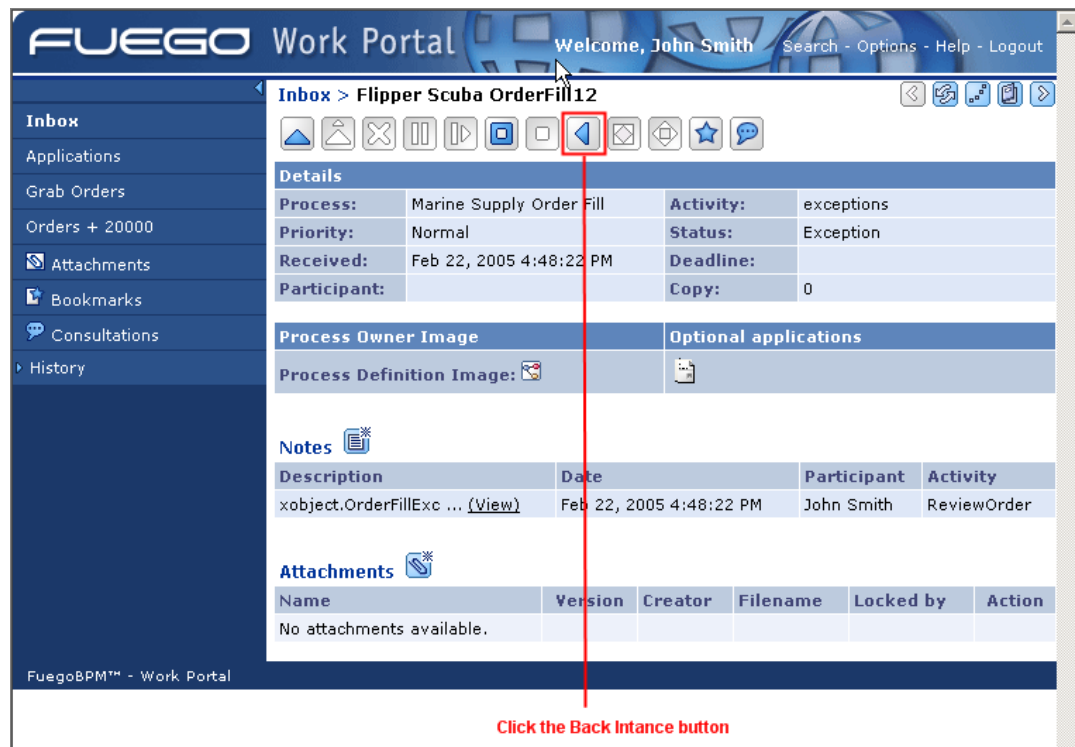
The **Back Instance** button  allows you to return to the activity where an exception occurred and to continue processing the instance from that point.

## Note

 This button is only available if: - an exception handler was included in the design of the business process, and - an exception occurred in the instance and invoked the exception handler.



### To send an instance back to the previous activity

- From the task panel for the instance you want to send back, click the **Back Instance** button  in the toolbar.



**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout


**Inbox > Flipper Scuba OrderFill12**


Toolbar:  

**Details**


Process:	Marine Supply Order Fill	Activity:	exceptions
Priority:	Normal	Status:	Exception
Received:	Feb 22, 2005 4:48:22 PM	Deadline:	
Participant:		Copy:	0

**Process Owner Image** **Optional applications**

**Process Definition Image:** 

**Notes** 


Description	Date	Participant	Activity
xobject.OrderFillExc ... (View)	Feb 22, 2005 4:48:22 PM	John Smith	ReviewOrder

**Attachments** 

Name	Version	Creator	Filename	Locked by	Action
No attachments available.					

FuegoBPM™ - Work Portal

Click the Back Instance button

- From the instance panel, select the check box in the check column next to the instance you want to send back. Click the **Back Instance** button  in the toolbar.

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout


**Inbox** Showing 1-3 of 3

	Description	State	Activity	Participant	Payment type	Ord Am
<input checked="" type="checkbox"/>	<a href="#">Flipper Scuba OrderFill12</a>	Exception	exceptions		cash	20.0
<input type="checkbox"/>	<a href="#">Scubapro Dive Shops OrderFill13</a>	Running	Check Freight		cash	880.
<input type="checkbox"/>	<a href="#">Flipper Scuba OrderFill11</a>	Running	Review Order		credit	14.3


Step 1: Select the Instance

Step 2: Select Back Instance button

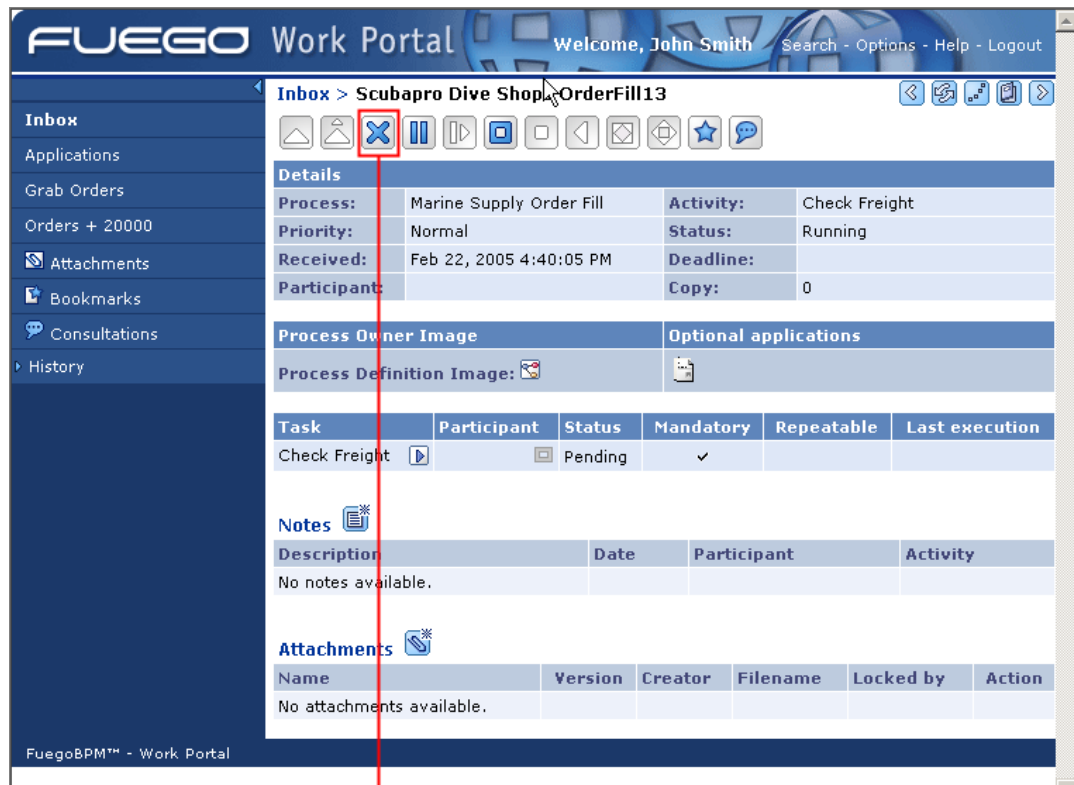
## Aborting an Instance

Clicking the **Abort Instance** button  allows you to terminate and delete an instance. All processing ceases and the instance is removed from the business process.


### To abort an instance

- From the task panel for the instance you want to abort, click the **Abort Instance** button  in the toolbar.

## Working with Activities Instances and Tasks



Click the Abort Instance button to terminate/delete instances and stop all processing on them

- From the instance panel, select the check box in the check column ☒ next to the instance you want to abort. Click the **Abort Instance** button  in the toolbar.



## Working with Activities Instances and Tasks


The screenshot shows the FUEGO Work Portal interface. The top header includes the logo, 'Welcome, John Smith', and navigation links. A left sidebar contains a menu with items like 'Inbox', 'Applications', 'Grab Orders', etc. The main area displays an 'Inbox' table with columns: Description, State, Activity, Participant, Payment type, and Order Amount. Three instances are listed, with the middle one selected. Red arrows point to the selection checkbox and the 'Abort Instance' button. Red text at the bottom provides instructions for these actions.

	Description	State	Activity	Participant	Payment type	Order Amount
<input type="checkbox"/>	Flipper Scuba OrderFill12	Running	Review Order		cash	20.00
<input checked="" type="checkbox"/>	Scubapro Dive Shops OrderFill13	Running	Check Freight		cash	880.60
<input type="checkbox"/>	Flipper Scuba OrderFill11	Running	Review Order		credit	14.35

**Step 1:** Select the instance/s you want to abort

**Step 2:** Click the Abort Instance button to terminate/delete instances and stop all processing on them


### Note

 Notice that only instances in activities designed as **Abortable** can be aborted. In addition to this, the Abort action button might be disabled for you. In FuegoBPM Enterprise Edition you must also have permissions to abort instances.



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# Chapter 6. Views

## Creating a View






Use the **Create View**  button to create a personalized view displaying only the kind of information you wish. For example, you can choose to view all instances assigned to you in a process without having to click each activity. You can also define a view with two or more specific processes that display all the instances. Other options include changing the columns you want to be displayed in the instance panel.

### Note

 In some processes, the functionality to create views is not provided and the **Create View**  button is not displayed on your workspace. Check with your system administrator.

### To create a view



1. Click the **Create View** button  on the top right corner of Work Portal main window. The **Create View** window appears.

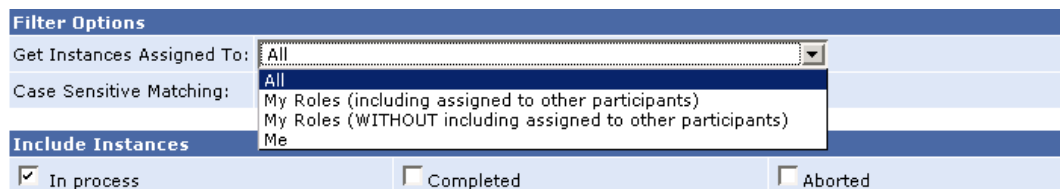
View Properties							
View Id:	<input type="text" value="Orders20000"/>						
Description:	<input type="text" value="Orders + 20000"/>						
Parent View:	<input type="text" value=""/>						
Is hidden?	<input type="checkbox"/>						
Presentation preview <input type="text" value="default_instances"/>  							
Description	State	Received	Activity	Participant	Payment type	Order Amount	Initiator
<b>Processes</b> <input type="checkbox"/> nonParametricRoles <input checked="" type="checkbox"/> Marine Supply Order Fill <input type="checkbox"/> usingParametricRoles							
<b>Filter Options</b> Get Instances Assigned To: <input type="text" value="My Roles (including assigned to other participants)"/> Case Sensitive Matching: <input type="checkbox"/>							
<b>Include Instances</b> <input checked="" type="checkbox"/> In process <input type="checkbox"/> Completed <input type="checkbox"/> Aborted							
<b>Conditions</b> Match all of the following <input type="checkbox"/>							
<b>Add Condition:</b> <input type="text" value="Activity"/> 							
Order Amount <input type="text" value="Greater Than"/> <input type="text" value="20000"/> <input type="checkbox"/> Is parametric 							
<input type="button" value="Save"/> <input type="button" value="Clear"/> <input type="button" value="Close"/>							
<b>Filter Description</b>  (Order Amount Greater Than 20000)							
FuegoBPM™ - Work Portal							

2. Filter description is:

<b>Filter Description</b>  (Order Amount Greater Than 20000)
--

3. Type a short name for the view in the **View Id:** box. Do not use any non-alphanumeric characters (Not allowed: \ / , \$ ; + ' ".)

4. Type a short description in the **Description:** box. This description will appear in your Work Portal.
5. Select from the **Parent View:** list the category under which you want the description of the view to appear in the left panel of Work Portal main window.
6. Choose the presentation you want to use in your view by selecting one of the available presentations in the **Presentations** drop-down menu. There are two default presentations: *default* and *default\_activity*. If you want to create a new Presentation with a different set of columns, click the **New Presentation** button  on the right of the **Presentation** drop down list. If you want to edit the presentation currently assigned, click **Edit Presentation** icon .
7. Select the process or processes from which you are going to view instances.
8. Under the **Filter Options** section, choose the appropriate options. The first popup displays the options to filter instances depending on the participant the instances are currently assigned to. The checkbox below only applies if you include filter conditions on attributes whose values are strings of characters, such as description, it indicates whether the value set for the attribute must match with case sensitive criteria or not.



The screenshot shows the 'Filter Options' section of the Work Portal interface. It includes a 'Get Instances Assigned To:' dropdown menu with 'All' selected. Below it is a 'Case Sensitive Matching:' checkbox, which is currently unchecked. To the right of the checkbox is a dropdown menu with three options: 'All', 'My Roles (including assigned to other participants)', and 'My Roles (WITHOUT including assigned to other participants)'. Below these options is a section titled 'Include Instances' with three checkboxes: 'In process' (checked), 'Completed', and 'Aborted'.

9. **Include Instances** section gives the possibility of retrieving instances that are currently in process and/or instances that already finished the process execution with status aborted or completed. Default value is set to **In Process**. This is also the value automatically set when none of the three possibilities is

checked. Take into account that when completed or aborted options are used, it might take long to retrieve instances of that view depending on the amount of instances already completed that are stored in the database.

## Warning

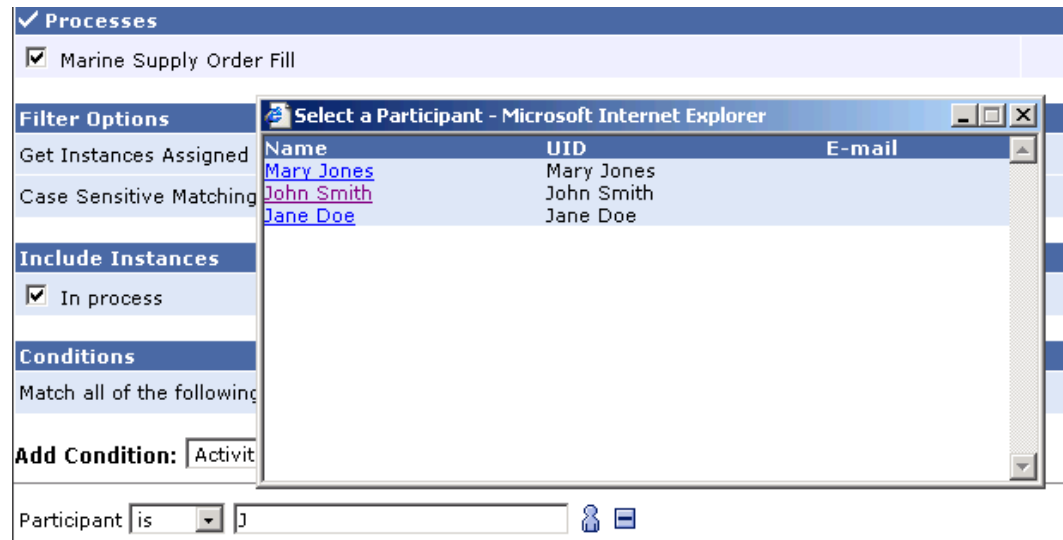


If you want to include aborted or completed instances in the view, make sure that you choose the option **All** in the combo **Get instances assigned to**. Otherwise, instances will not be found since, when aborted or completed, they are in an automatic role.


- Under the **Conditions** section, you can add conditions to filter instances. Choose a condition from the **Add Condition** list. The list includes not only standard columns displayed in Work Portal instances panel but also those instance variables declared as external by the process designers.

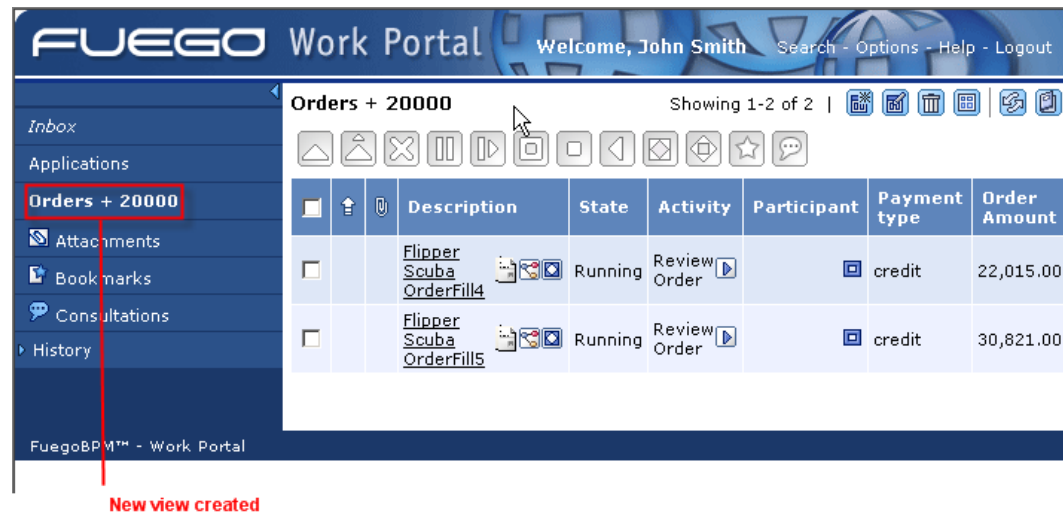
- Click to add the condition to the conditions list. Next, complete the data of the condition at will. Repeat the last two steps for additional conditions.
- Click to toggle between a calendar date and time to Now + /- time condition.
- Click next to a condition you want to remove.
- For the participant condition, you can search for participants matching a partial name: Enter the partial name and click .

The list of participants whose name matches the entered partial name are displayed in a new window. Select the participant you are searching for by clicking on the name.




15. Click **Save** and then click **Close**.

16. Click the **Refresh** button  on the top right corner of Work Portal main window. The new view appears in the left panel of your Work Portal and will remain there until you remove it.




### Warning




If you edit a presentation by using the **Edit Presentation** button , all of your Work Portal views using the edited presentation will also reflect the changes.

## Editing a View

Use the **Edit View** button  to make changes to an existing view.

### Note




In some processes, the functionality to edit views is not provided and the **Edit View**  button is not displayed on your workspace. Check with your system administrator.

### Note



Edit views functionality is not available for Activity Instances Views.

To make changes to an existing view,

1. Click on the view name in the left panel of your Work Portal so that the view name is in **bold**.
2. Click the **Edit View** button . The **Edit view** window appears.

View Properties							
View Id:	Orders20000						
Description:	Orders + 20000						
Parent View:	<div> <div></div> </div>						
Is hidden?	<input type="checkbox"/>						
Presentation preview <div>default_instances</div> <div> <div></div> <div></div> </div>							
Description	State	Received	Activity	Participant	Payment type	Order Amount	Initiator
<div> <div>✓ Processes</div> <div> <div> <input type="checkbox"/> nonParametricRoles           </div> <div> <input checked="" type="checkbox"/> Marine Supply Order Fill           </div> </div> <div> <input type="checkbox"/> usingParametricRoles           </div> </div>							
<div> <div>Filter Options</div> <div>           Get Instances Assigned To: <div>My Roles (including assigned to other participants)</div> </div> <div>           Case Sensitive Matching: <input type="checkbox"/> </div> </div>							
<div> <div>Include Instances</div> <div> <input checked="" type="checkbox"/> In process           <input type="checkbox"/> Completed           <input type="checkbox"/> Aborted         </div> </div>							
<div> <div>Conditions</div> <div>           Match all of the following <input type="checkbox"/> </div> <div> <div>Add Condition:</div> <div> <div>Activity</div> <div></div> </div> </div> <div> <div>Order Amount</div> <div> <div>Greater Than</div> <div>20000</div> </div> <div> <input type="checkbox"/> Is parametric           </div> </div> </div>							
<div> <div>Save</div> <div>Clear</div> <div>Close</div> </div>							
<div> <div>Filter Description</div> <div> <div></div> </div> <div>           (Order Amount Greater Than 20000)         </div> </div>							
FuegoBPM™ - Work Portal							



3. The Filter description is:

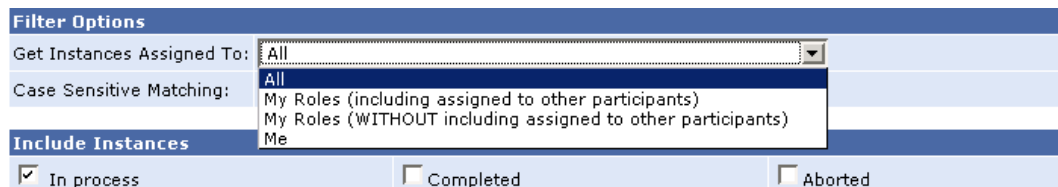
<div> <div>Filter Description</div> <div> <div></div> </div> <div>           (Order Amount Greater Than 20000)         </div> </div>
--

4. If you want to make a copy of the edited view, save it as the name typed in the **View Id:** box. Otherwise, **do not** change the



View Id. Do not use any non-alphanumeric characters (Not allowed: \ / , \$ ; + ' "). If you just want to change some attributes of the edited view, leave the field as it is displayed.

5. If you want to modify the label of the view displayed in Work Portal views tree, type the description in the **Description:** box. This new description will appear in your Work Portal.
6. Select from the **Parent View:** list the category under which you want the description of the view to appear in the left pane of Work Portal main window.
7. Choose the presentation you want to use in your view. Every presentation defines a set of columns. There are two default presentations: *default* and *default\_activity*. If you want to create a new presentation to assign to the edited view, first you have to create it by clicking the **New Presentation** button  to the right of the **Presentation** drop down list. If you want to edit the presentation currently assigned, click the **Edit Presentation**  icon.
8. Select the process or processes from which to view instances.
9. Under the **Filter Options** section, choose the appropriate options. The first popup displays the options to filter instances depending on the participant the instances are currently assigned to. The checkbox below applies only if you include filter conditions on attributes whose values are strings of characters such as description. It indicates whether the value set for the attribute must match with case sensitive criteria or not.



**Filter Options**

Get Instances Assigned To: All

Case Sensitive Matching: All

**Include Instances**

☒ In process ☐ Completed ☐ Aborted

10. **Include Instances** section gives the possibility to retrieve instances that are currently in process and/or instances that




already finished the process execution with status aborted or completed. Default value is set to **In Process** and this is also the value automatically set when none of the three possibilities is checked. Take into account that when completed or aborted options are used, it might take long to retrieve instances of that view depending on the amount of instances already completed that are stored in the database.


## Warning

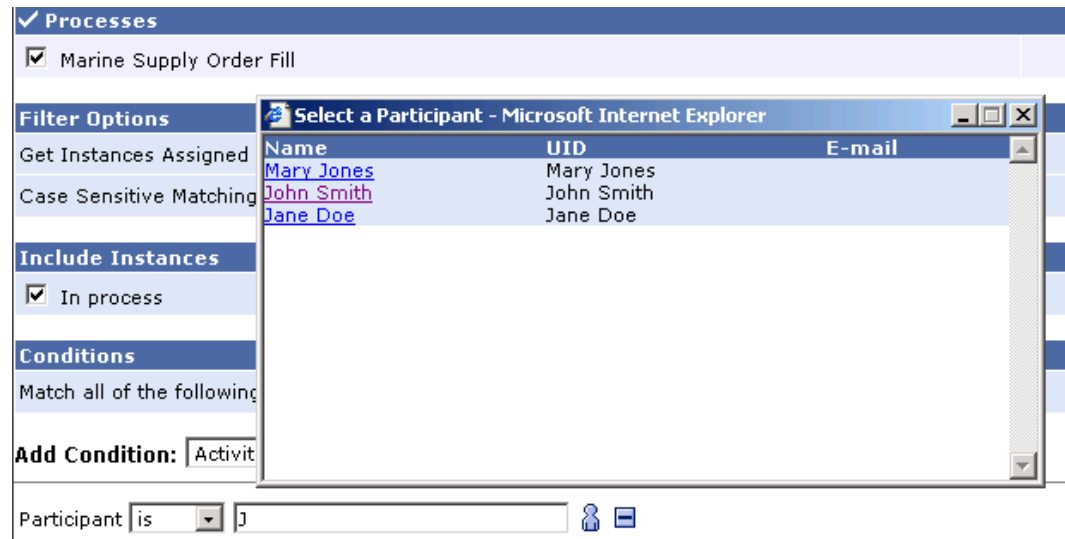


If you want to include aborted or completed instances in the view, make sure you choose the option **All** in the combo **Get instances assigned to**. Otherwise, instances will not be found since when aborted or completed, they are in an automatic role.

- Under the **Conditions** section you can add conditions to filter instances. Choose a condition from the **Add Condition** list. The list includes not only standard columns displayed in Work Portal instances panel but also those instance variables declared as external by the process designers.

- Click  to add the condition to the conditions list. Then complete the data of the condition at will. Repeat the last two steps for additional conditions.
- Click  to toggle between a calendar date and time to Now + /- time condition.
- Click  next to a condition you want to remove.


15. For the participant condition, you can search for participants matching a partial name: Enter the partial name and click . The list of participants whose name matches the entered partial name are displayed in a new window. Select the participant you are searching for by clicking on the name.




16. Click **Save**, and then click **Close**.

## Warning




If you edit a presentation by using the **Edit Presentation** button  all of your Work Portal views using the edited presentation will also reflect the changes.

# Deleting a View

Use the **Delete View** button  to remove old view from your Work Portal.


## Note



In some installations, the functionality to delete views may be limited or not provided at all. If this is the case, the **Delete View**  button is not

displayed on your workspace. Check with your system administrator.

To delete a view

1. Click on the view name in the left panel of your Work Portal so that the view name is in **bold**.
2. Click on the **Delete View** button  on the top right of your Work Portal.

## Bookmarking a View

You can create a bookmark in your Internet browser to go quickly to a view that you need to view frequently.

To bookmark a view

1. Click the view you want to bookmark.
2. Select **Add to Favorites** (Internet Explorer) or **Create Bookmark** (Netscape) in your Internet browser.
3. Type a suitable name for your bookmark, for example: "Marine Supply Order Product view".

## Viewing a bookmark

View a bookmark in order to quickly go to a particular view.

To view a bookmark

1. Click the bookmark link.
2. Click the **Refresh** button  to ensure that the most current

instance information is displayed.

## Sorting Instances

Instances are sorted according to the values set to the options **Sort instances by** and **Instances order** in the Options window.

Nevertheless, you can choose to sort instances for a certain view by any of the categories shown as column headings.

### To sort instances displayed in a view

Click any column heading to sort the list by that category. A small arrowhead appears in the column heading indicating whether the list is sorted in ascending (a to z) or descending (z to a) order. To reverse sort order, click the column heading a second time.

### Note



If the sort criteria is changed by clicking in a different column, the change lasts for the time the current session lasts. Next time the user relogs, it will display the sort criteria defined in Options window.

### To specify a default column by which to sort all instances

1. Click the **Options** link on the top of your Work Portal window. The **Options** window opens.

The screenshot shows the FUEGO Work Portal interface. The top header includes the logo, user name 'Welcome, John Smith', and navigation links: Search, Options (highlighted with a red box), Help, and Logout. A left sidebar contains a menu with 'Inbox' selected, and other options like Applications, Orders + 20000, Attachments, Bookmarks, Consultations, and History. The main area displays the 'Inbox' view with a table of orders. Above the table are icons for various actions and a status indicator 'Showing 1-4 of 4'. The table has columns for Description, State, Activity, Participant, Payment type, and Order Amount.

		Description	State	Activity	Participant	Payment type	Order Amount
<input type="checkbox"/>		Diving Supply OrderFill1	Running	Review Order		cash	20.00
<input type="checkbox"/>		Flipper Scuba OrderFill2	Running	Review Order		credit	2,400.00
<input type="checkbox"/>		Flipper Scuba OrderFill5	Running	Review Order		credit	30,821.00
<input type="checkbox"/>		Flipper Scuba OrderFill4	Running	Review Order		credit	22,015.00

2. The **Options** window opens. Choose the category you want to sort by from the **Sort instances by:** box.

Options		Help
<b>User Information</b>		
Full Name:	John Smith	
Login Name:	John Smith	
E-mail:		
<b>Browser settings</b>		
Enable Flash version menu:	<input type="checkbox"/>	
Enable DHTML support:	<input checked="" type="checkbox"/>	
<b>Settings</b>		
Sort instances by:	Payment type	
Instances order:	Ascending	
Instances date format:	10:40 AM, 8 Oct, 8 Oct 1980	
Show hidden views:	<input type="checkbox"/>	
Follow the Instance:	<input type="checkbox"/>	
Notify me by e-mail when new instances arrive:	<input type="checkbox"/>	
Keep instance view:	<input type="checkbox"/>	
Enable applet for attachment management:	<input type="checkbox"/>	
Enable remote scripting for FuegoObject presentations:	<input checked="" type="checkbox"/>	
Show applications:	In a folder	
User Working Directory:	/temp/	
	(Including last path separator, ie.: 'c:\temp\').	
Maximum number of searches in history:	10	
<b>Display options</b>		
Number of instances:	10	
Language:	English	
Country:	United States	
TimeZone:	GMT-03:00	
Save Close		

3. Choose Descending or Ascending from the **Instances order** box.
4. Click **Save** button and close the options window. The change is applied to all views provided you didn't change the sorting criteria in the current Work Portal session.

## Presentations


Presentations are the layouts an instance view is displayed with. Instances views are used by Work Portal to show FuegoBPM Process Instances information. A presentation is composed by a set of columns and the size with which the columns are displayed.

Every column represents FuegoBPM Process instances data needed when processing instances.

You can create presentations and assign them to views in order to vary the way instances information is displayed in a view.

FuegoBPM provides a fixed set of data that can be included in a presentation. However, that set of information can be extended by Process Designers. They can decide some meaningful information to be visible from Work Portal.

### **Presentations window**

From Work Portal Instances views, click **Presentations**  icon. The **Presentations** window opens. There are two default presentations:

- **default\_instances** : It is automatically applied to views that correspond to process level. No matter the activity, all the instances in the process will be displayed in this kind of view. That's why **default\_instances** presentation columns include the default column **Activity** in order to provide users with information regarding the activity on which an instance is currently located. The following image shows the **default\_instances** presentation columns and additional available columns.



The screenshot shows the 'Presentations' configuration window. On the left, a sidebar lists 'default\_activity' and 'default\_instances'. The main area is titled 'Presentation default\_instances'. It features three panels: 'Available Columns' with a list of attributes (Activity deadline, Approved, Copy, Deadline, Discount, Priority, Process, Process deadline), 'Presentation Columns' with a list of attributes (Description, State, Received, Activity, Participant, Payment type, Order Amount, Initiator), and 'Column Size' with a text input field. Navigation arrows (>> and <<) are between the first two panels. Below these panels is a 'Presentation preview' section showing a table with columns: Description, State, Received, Activity, Participant, Payment type, Order Amount, and Initiator. At the bottom are 'Save' and 'Close' buttons.

- **default\_activity** : Applies to views that correspond to activity level. The following image shows the **default\_activity** presentation columns and additional available columns.

The screenshot shows the 'Presentations' configuration window. On the left, a sidebar lists 'default\_activity' and 'default\_instances'. The main area is titled 'Presentation default\_activity'. It features three panels: 'Available Columns' with a list of attributes (Activity, Activity deadline, Approved, Copy, Discount, Initiator, Order Amount, Payment type, Process, Process deadline), 'Presentation Columns' with a list of attributes (Description, Priority, State, Received, Deadline, Participant), and 'Column Size' with a text input field. Navigation arrows (>> and <<) are between the first two panels. Below these panels is a 'Presentation preview' section showing a table with columns: Description, Priority, State, Received, Deadline, and Participant. At the bottom are 'Save' and 'Close' buttons.

Although these presentations have a default set of columns, you can change the columns displayed and the sizes of the columns.


## Warning

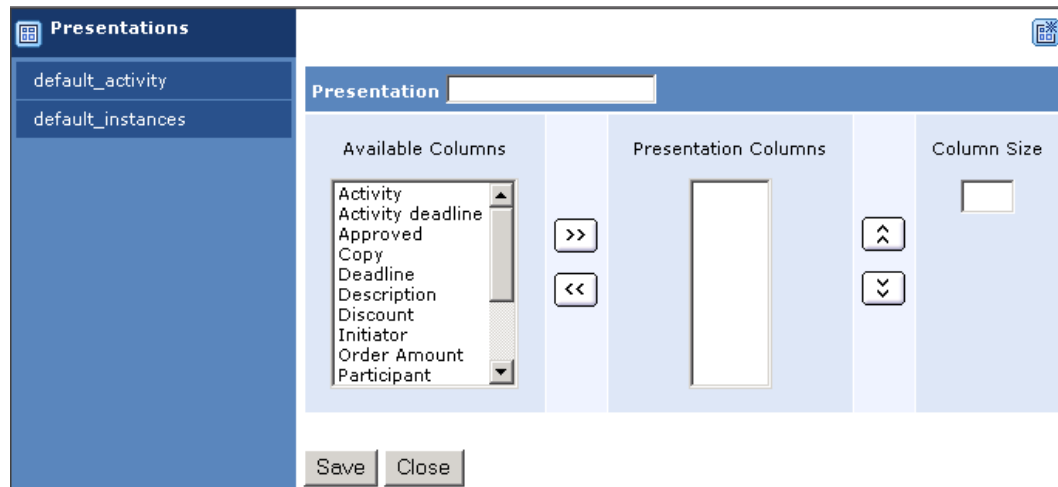


Any change made to a default presentation applies to every view that uses the default presentation.

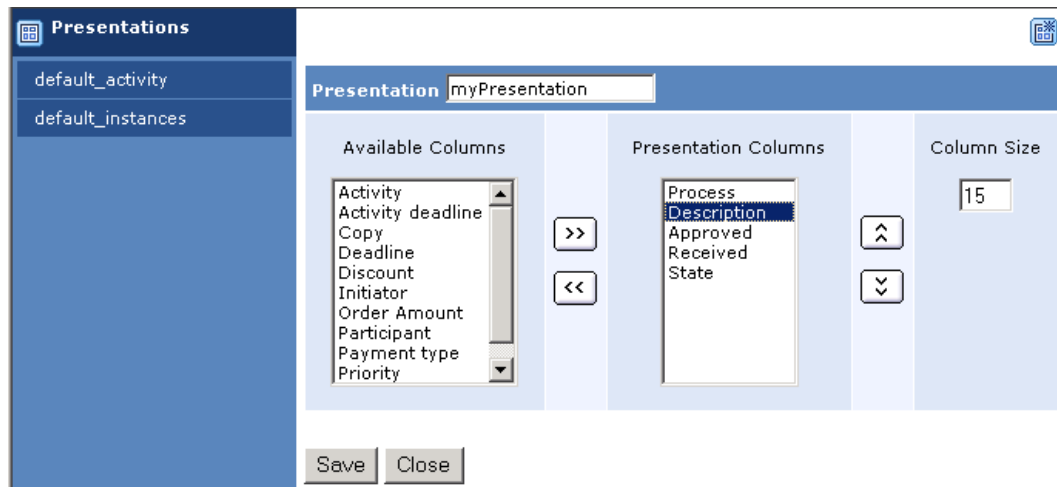
# Creating a presentation

## To create a new presentation

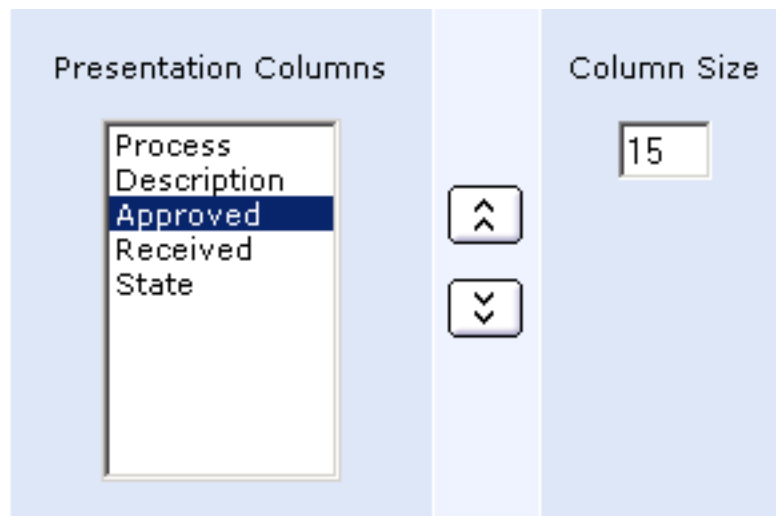
1. Click the **Create Presentation** icon  in the upper-right of the Presentation workspace. The presentation creation workspace appears.



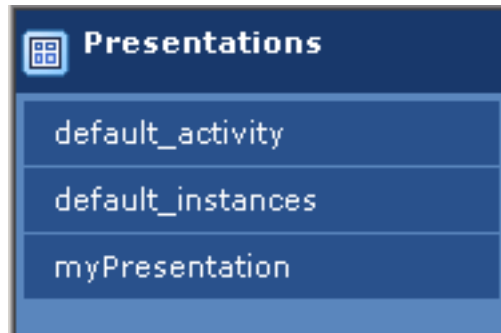
2. Type the presentation name in the **Presentation** field.
3. Select columns you want to include in your presentation from the **Available Columns** list box. Add or remove the options by clicking the column name and then the right or left arrow buttons.



4. Select the order in which the columns should display 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 for each selection in the **Presentation Columns** list box.





6. Click the **Save** button to save the presentation.
7. After saving, the new presentation appears on the left side of the Presentation workspace.



8. And the **Presentation Preview** appears at the bottom of the page.

Presentation preview				
Process	Description	Approved	Received	State


### Note

 You can also create a presentation from the **Edit View** window by clicking **New Presentation**  icon next to the Presentations drop-down list.

## Editing a presentation



Presentations can be easily edited.

### To edit a presentation

1. Open the **Presentations window** by clicking on **Presentations**  icon.
2. Double-click the presentation to edit. 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.



### Note

 You can also edit a presentation from the **Edit View** window clicking **Edit Presentation**  icon next to the Presentations drop-down list.



## Deleting a presentation

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


### To delete a presentation

1. Open the **Presentations window** clicking on **Presentations**  icon.
2. Select the presentation to delete and click the trash can icon  on 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 back to the original settings of one of the default presentations, select the default presentation and click on the  **Recover default presentation** icon.

## Parametric Views

Parametric views are views customized created by the administrator which conditions include parametric values for the attribute. This gives you the possibility to choose which value you want the attributes to set to include the instances in the view.

Instances initially included in the view are chosen according to the default values the administrator gave to the attributes when creating the view.

The first time you select it, you are able to change the value of the parametric attributes that conform the view condition. Once you have changed the values or not, click the **OK** button. These values are only set for the current session, next time you log in to Work Portal, the default values will be the ones set at creation time by the administrator.

If you edit this view, and change its default values, this new configuration of the view will be only available for you. The next time you log in to Work Portal these new settings are the valid ones, that you, of course, will be able to modify for the current session.

*Initiator* attribute is special, as you can set it as the *Current User* by clicking the *Change to select User mode* icon. Therefore, it sets this condition to your participant.

## Bookmark View


Work Portal users can bookmark instances and they are displayed in the Bookmark view. Bookmarked instances are set by participant, they are not shared between participants.

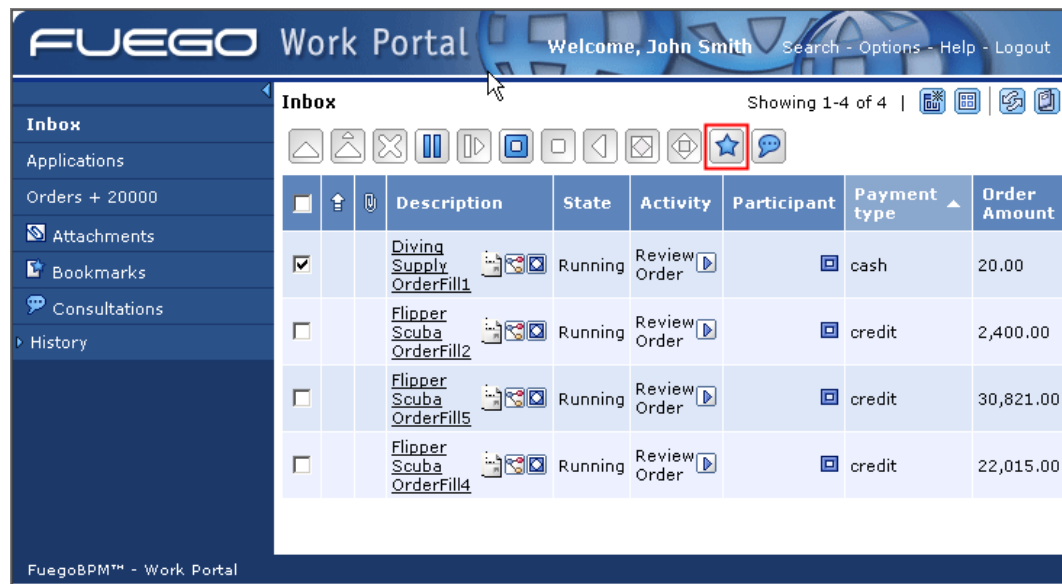
Instances Bookmarks scope is not per session. When users close the current session in which they set the bookmark to an instance, this bookmark will still exist when they open a new session. However, this is valid, only if the bookmarked instances are still active, in other words, if they have not reached the *End* activity.

*Bookmark* is a default view. It is only generated if at deployment time the **Generate Default Views** option is selected. Work Portal users

are not allowed to edit it.

### To bookmark an instance

1. Select the instance you want to bookmark, by clicking the *Select* column,
2. Bookmark the instance by clicking the *Bookmark Instance* icon  from the main tool bar.



The screenshot shows the FUEGO Work Portal interface. The top header includes the logo, user name 'John Smith', and navigation links. The left sidebar contains a menu with 'Inbox' selected. The main area displays an 'Inbox' view with a table of order instances. The table has columns for Description, State, Activity, Participant, Payment type, and Order Amount. A red box highlights the star icon in the toolbar, which is used to bookmark an instance.

	Description	State	Activity	Participant	Payment type	Order Amount
<input checked="" type="checkbox"/>	Diving Supply OrderFill1	Running	Review Order		cash	20.00
<input type="checkbox"/>	Flipper Scuba OrderFill2	Running	Review Order		credit	2,400.00
<input type="checkbox"/>	Flipper Scuba OrderFill5	Running	Review Order		credit	30,821.00
<input type="checkbox"/>	Flipper Scuba OrderFill4	Running	Review Order		credit	22,015.00

3. Open the *Bookmark* view:

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Inbox** Showing 1-4 of 4

		Description	State	Activity	Participant	Payment type	Order Amount
<input checked="" type="checkbox"/>		Diving Supply OrderFill1	Running	Review Order		cash	20.00
<input type="checkbox"/>		Flipper Scuba OrderFill2	Running	Review Order		credit	2,400.00
<input type="checkbox"/>		Flipper Scuba OrderFill5	Running	Review Order		credit	30,821.00
<input type="checkbox"/>		Flipper Scuba OrderFill4	Running	Review Order		credit	22,015.00

FuegoBPM™ - Work Portal

4. The instance is included in the bookmarked instances list.

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Bookmarks** Showing 1-1 of 1

		Description	State	Activity	Participant	Payment type	Order Amount
<input type="checkbox"/>		Diving Supply OrderFill1	Running	Review Order		cash	20.00

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### Note



If you are not seeing the *Bookmark* view in your Work Portal contact the administrator.

## Consultation View

When working with an instance, Work Portal users may need to ask information to other participants about it. Instead of doing it from outside FuegoBPM, users are able to make a consultation to other




participants for an instance through Work Portal.

All consultations received by the user are contained and display in the *Consultation* view.

Consultations on an instance are stored as instance's Notes, that is the reason why all participants will see every consultation (in a Note) for an instance.



If the consulted participant needs to ask to some other participant something about the instance there is no restriction in generating a new consultation on the instance to a new participant.

### Note

 If you are not seeing the *Consultation* view in your Work Portal contact the administrator.

## Sending a Consultation

### To send a Consultation

1. Select the instance you want to add a consultation, by clicking the *Select* column,
2. Send a Consultation by clicking the *Consult* icon  from the main tool bar.
3. A new form is opened asking you for some information:
  - a. *Select a Participant*: Type the name of the participant if you know it, or select one from the list opened by clicking the participant icon  on the right side of the field.
  - b. *Note*: Type the consultation you are making to the participant.

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Consult**

Select a Participant: Jane Doe

Note: Do you have any problems record on this customer?

Send Cancel

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4. Click the **Send** button to send the consultation, or the **Cancel** button to abort.
5. Consultation is available from now on, as an instance Note.

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Inbox > Diving Supply OrderFill1**

**Details**

<b>Process:</b>	Marine Supply Order Fill	<b>Activity:</b>	Review Order
<b>Priority:</b>	Normal	<b>Status:</b>	Running
<b>Received:</b>	Feb 23, 2005 12:57:24 PM	<b>Deadline:</b>	
<b>Participant:</b>		<b>Copy:</b>	0

**Process Owner Image**

**Optional applications**

**Process Definition Image:**

Task	Participant	Status	Mandatory	Repeatable	Last execution
Review Order		Pending	✓		
Mail		Pending		✓	

**Notes**

Description	Date	Participant	Activity
Do you have any prob ... (View)	Feb 23, 2005 2:10:11 PM	John Smith	ReviewOrder

**Attachments**

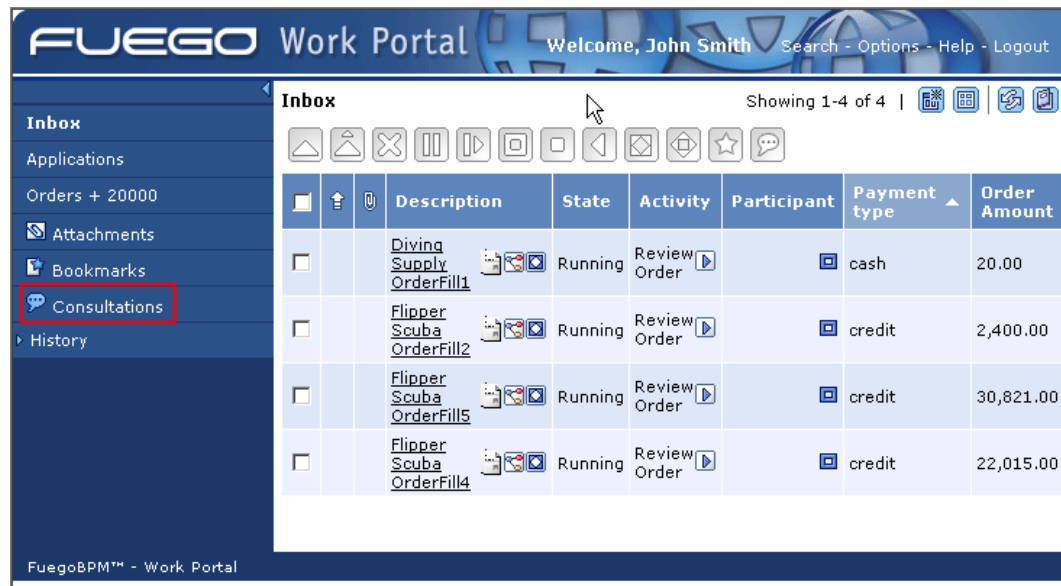
Name	Version	Creator	Filename	Locked by	Action
No attachments available.					

FuegoBPM™ - Work Portal

# Viewing Consultations

## To view a Consultation

1. Select the *Consultation* view to visualize the instances on which you have pending consultations.



The screenshot shows the FUEGO Work Portal interface. The left sidebar contains a navigation menu with 'Inbox' selected. The main area displays a table of consultations. The table has columns for Description, State, Activity, Participant, Payment type, and Order Amount. There are four rows of data, each representing a consultation instance. The 'Consultations' link in the sidebar is highlighted with a red box.

Description	State	Activity	Participant	Payment type	Order Amount
Diving Supply OrderFill1	Running	Review Order		cash	20.00
Flipper Scuba OrderFill2	Running	Review Order		credit	2,400.00
Flipper Scuba OrderFill5	Running	Review Order		credit	30,821.00
Flipper Scuba OrderFill4	Running	Review Order		credit	22,015.00

2. Select one of the instances in the view.
3. The first part of the screen displays the consultation that some participant has made you on this particular instance.
  - a. *From participant*: participant that is making the consultation.
  - b. *Comments*: consultation text.

**FUEGO Work Portal** Welcome, Jane Doe Search - Options - Help - Logout

**Consultations > Industrial Salvage OrderFill7**

**Instance Consultation**

From participant: John Smith

Comments: Do you have any problem records on this customer?

**Details**

Process:	Marine Supply Order Fill	Activity:	Review Order
Priority:	Normal	Status:	Running
Received:	27/02/2004 17:03:37	Deadline:	
Participant:		Copy:	0

Task	Participant	Status	Mandatory	Repeatable	Last execution
Review Order		Pending	✓		
Mail		Pending		✓	

**Notes**

Description	Date	Participant	Activity
Do you have any prob ... (View)	27/02/2004 17:45:26	John Smith	ReviewOrder

**Attachments**

Name	Version	Creator	Filename	Locked by	Action
No attachments available.					

Fuego™ - Work Portal


## To answer a Consultation

Generate a new consultation to the participant from which you recieved it.

# History View

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

## Note

 If you are not seing the *History* view in your Work Portal contact the administrator.

## History views set

The *History* views set are based on the *weeks*. You will always see instances that you have been working on from the *current* week up to *three weeks ago*, that is in the last 4 weeks.

### How is the set built?

You will always see a view for each past week. The present week is split in one view per day from the beginning of the week up to today.

The *History* views set is composed by:

- *Today*,
- A view per each day that complete the present 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*.

### Week definition

The week definition can vary and this affects the way the set view is built and where you will see the instances.

As you know, week definition depends on GMT zone and country, and its definition may be:

- From *Sunday* to *Saturday*, or

- From *Monday* to *Sunday*.

The instances will be 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.

### **Example**

Suppose that today is *Thursday: Febraury, 26th*.

Let's see how the *History* views set is built if your Work Portal settings are:

#### **Country: United States**

The week definition in this case is from *Monday* to *Sunday*.

The History default views will be:

- *Today*, (Friday Febraury, 27th)
- *Yesterday*, (Thursday Febraury, 26th)
- *Wednesday*, (Febraury, 25th)
- *Tuesday*, (Febraury, 24th)
- *Monday*, (Febraury, 23th)
- *Last week*, (Febraury, 16th - 22st)
- *Two weeks ago*, (Febraury, 9th - 15th)
- *Three weeks ago*, (January, 31st - Febraury, 8th)

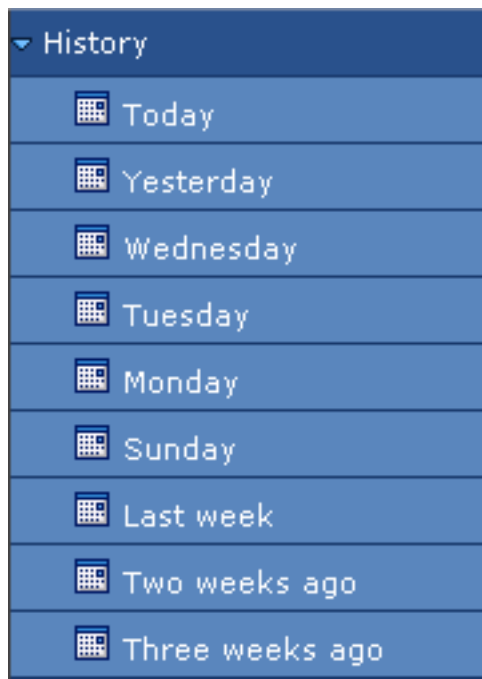
#### **Country: United Kindom**

The week definition in this case is from *Sunday* to *Saturday*.

The History default views will be:

- *Today*, (Friday Febraury, 27th)
- *Yesterday*, (Thursday Febraury, 26th)
- *Wednesday*, (Febraury, 25th)
- *Tuesday*, (Febraury, 24th)
- *Monday*, (Febraury, 23h)
- *Sunday*, (Febraury, 22th)
- *Last week*, (Febraury, 15th - 21st)
- *Two weeks ago*, (Febraury, 8th - 14th)
- *Three weeks ago*, (Febraury, 1st - 7th)

***History view set for Friday Febraury, 27th:***



*Today view for Friday Febraury, 27th:*

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Today** First Showing 1-2 of 2 Last | [Icons]

☒ Description State Received Activity Participant Payment type Order Amount Initiator

<input type="checkbox"/>	<a href="#">Industrial Salvage OrderFill1</a>	Running	15:55:49	Review Order		credit	27,092.00	John Smith
<input type="checkbox"/>	<a href="#">Scubapro Dive Shops OrderFill2</a>	Activity completed	15:57:16	Review Order		cash	29,302.00	John Smith

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*Yesterday view for Saturday Febraury, 28th:*

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Yesterday** First Showing 1-2 of 2 Last | [Icons]

☒ Description State Received Activity Participant Payment type Order Amount Initiator

<input type="checkbox"/>	<a href="#">Industrial Salvage OrderFill1</a>	Running	Feb 27 03:55:49 PM	Review Order		credit	27,092.00	John Smith
<input type="checkbox"/>	<a href="#">Scubapro Dive Shops OrderFill2</a>	Activity completed	Feb 27 03:57:16 PM	Review Order		cash	29,302.00	John Smith

FuegoBPM™ - Work Portal



*Last week view for Monday March, 1st:*

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Last week** First Showing 1-2 of 2 Last

✓	Description	State	Received	Activity	Participant	Payment type	Order Amount	Initiator
<input type="checkbox"/>	<a href="#">Industrial Salvage OrderFill1</a>	Running	Feb 27 03:55:49 PM	Review Order		credit	27,092.00	John Smith
<input type="checkbox"/>	<a href="#">Scubapro Dive Shops OrderFill2</a>	Activity completed	Feb 27 03:57:16 PM	Review Order		cash	29,302.00	John Smith

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## Note

If you change your settings in a way that makes the week definition change, you will not see the changes on the *History* views set until you log in into the Work Portal again.

## Which instances are included?

By default, only active instances are displayed. This means that you will not see *Completed* or *Aborted* instances.

## Note

If you are supposed to be seeing *Completed* and/or *Aborted* instances and they are not being included in the *History* views, contact your Administrator.



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## Chapter 7. Attachments

### Viewing an attached file


You can view any file attached to an instance. To have visibility to this attachment and be able to perform actions on them, you need to have access to the role where the instance is located. This basically enforces a role based security for the attachments associated to instances flowing through business processes. You also view any notes or comments associated to the attachment and the attachment's revision history.





#### To view an attached file

1. Click the description of the appropriate instance. All attachments associated to that instance are listed under the **Attachments**  section in the lower portion of the Task panel.
2. Click the name of the attachment you want to view. If there is more than one version of the attachment, you can also click the **Versions** button  in the **Activity** column in order to display all previous versions of the attachment. You can then click on the name of the previous version you want to view. More about versions: Each time someone makes a change to the attachment, a new version is created and the name of the person who made the change is listed. You can choose to view the most current version, the previous versions or the original document. The attachment appears in a separate Web browser.

Click to view existing attachments

Click to view previous versions of existing attachments


Attachments 

Name	Version	Creator	Filename	Date	Locked by	Action
List of Clients	1	Part1	clientFile.xls	Jun 8, 2005 4:32:42 PM		    

3. To launch the file in its own application, select the **ENABLE APPLLET FOR ATTACHMENT MANAGEMENT** check box in the

**Options** window.

### Note

 Each time someone makes changes to the attachment, a new version is created and the name of the person who made the change is listed. You can choose to view the most current version, the previous versions or the original document.

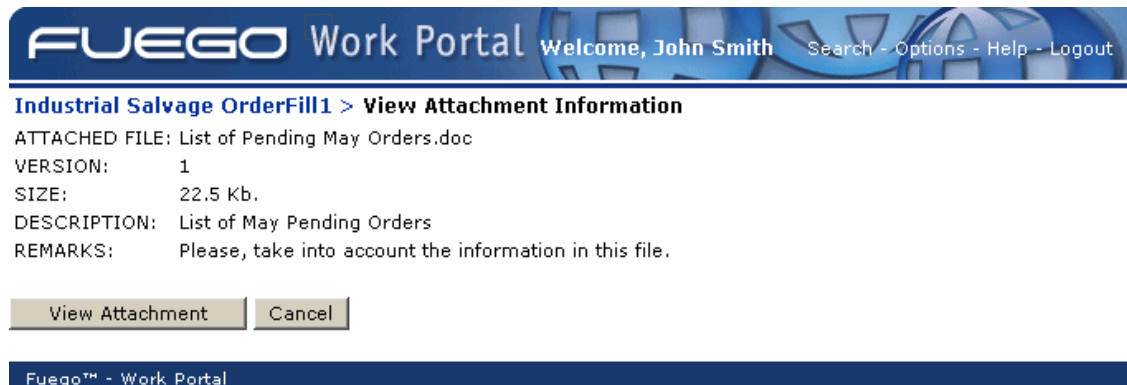
## Viewing attachment information

**You can view any notes or comments associated to an attachment.**

To view information about an attachment without actually displaying the attachment


- Click the **View Attachment Information** button  in the **Action** column. The **View Attachment Information** window appears.

**Example:**




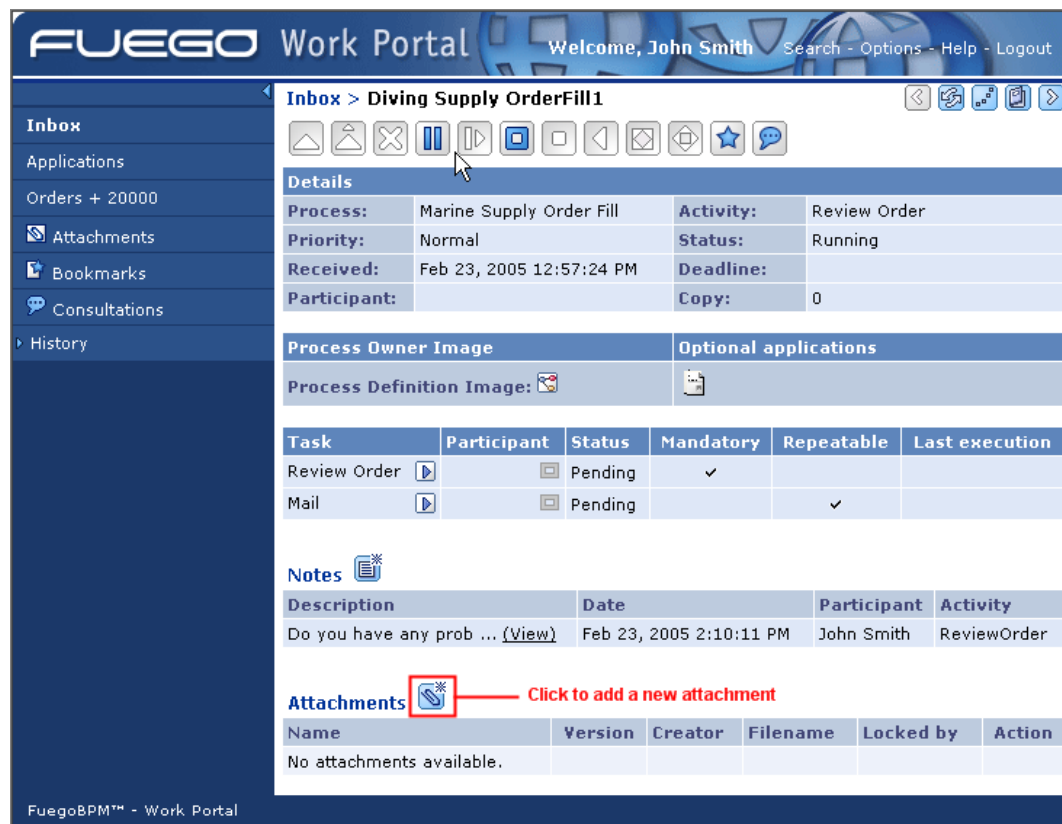
The screenshot shows the FUEGO Work Portal interface. At the top, a blue header bar contains the text "FUEGO Work Portal" and "Welcome, John Smith". To the right of the welcome message are links for "Search", "Options", "Help", and "Logout". Below the header, the breadcrumb "Industrial Salvage OrderFill1 > View Attachment Information" is displayed. The main content area lists the following information:  
ATTACHED FILE: List of Pending May Orders.doc  
VERSION: 1  
SIZE: 22.5 Kb.  
DESCRIPTION: List of May Pending Orders  
REMARKS: Please, take into account the information in this file.  
At the bottom of the content area are two buttons: "View Attachment" and "Cancel". A dark blue footer bar at the very bottom contains the text "Fuego™ - Work Portal".

## Attaching a file

You can attach information to your instances by using the **New Attachment** button  to attach a file.

### To attach a file to an instance

1. Click the description of the appropriate instance.
2. Click the **New Attachment**  button in the lower portion of the task panel.




**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout





**Inbox > Diving Supply OrderFill1**


**Details**

<b>Process:</b>	Marine Supply Order Fill	<b>Activity:</b>	Review Order
<b>Priority:</b>	Normal	<b>Status:</b>	Running
<b>Received:</b>	Feb 23, 2005 12:57:24 PM	<b>Deadline:</b>	
<b>Participant:</b>		<b>Copy:</b>	0


**Process Owner Image** **Optional applications**

**Process Definition Image:** 

Task	Participant	Status	Mandatory	Repeatable	Last execution
Review Order 		Pending	✓		
Mail 		Pending		✓	

**Notes** 

Description	Date	Participant	Activity
Do you have any prob ... <a href="#">(View)</a>	Feb 23, 2005 2:10:11 PM	John Smith	ReviewOrder

**Attachments**  Click to add a new attachment

Name	Version	Creator	Filename	Locked by	Action
No attachments available.					

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3. The **New Attachment** window appears. Type the directory path and file name in the **ATTACH FILE** text box. You can also click **Browse** and then double-click the file you want to attach.
4. Click on Advanced checkbox if you want to specify the file content type. The three options appear. Select the appropriate option; if you choose select from list, you will be prompted to choose one of the menu options. If the enter manually option is

selected, you must enter the content type in the text box. If Advanced checkbox is unchecked, the auto-detect option is used.

5. Type the file description and any remarks.

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Industrial Salvage OrderFill1 > New Attachment**

ATTACH FILE: C:\Documents And Settings\My Documents\ Browse... ☒ Advanced options

CONTENT TYPE: ☐ auto-detect ☐ select from list: plain text (text/plain) ☒ enter manually: /application/msword

YOU CAN BROWSE TO SELECT THE FILE.

DESCRIPTION: List of Pending May Orders


REMARKS: Please, take into account the information in this file.

Ok Cancel



FuegoBPM™ - Work Portal

6. Click **Ok** to complete attaching the file and return to the previous window.

### Note



 The size of an attachment is limited to 2Mb

## Editing an attached file

Use the **Edit** button  in the Attachments  section of the task panel to edit files attached to an instance.

### To edit an attached file

1. Click the description of the appropriate instance.
- 2.

 section of the task panel, click the **Edit** button  shown under the **Action** column next to the attachment you want to edit. The **Edit Attachment** window appears.

**FUEGO** Work Portal
 Welcome, John Smith
 Search - Options - Help - Logout

Industrial Salvage OrderFill1 > Edit Attachment

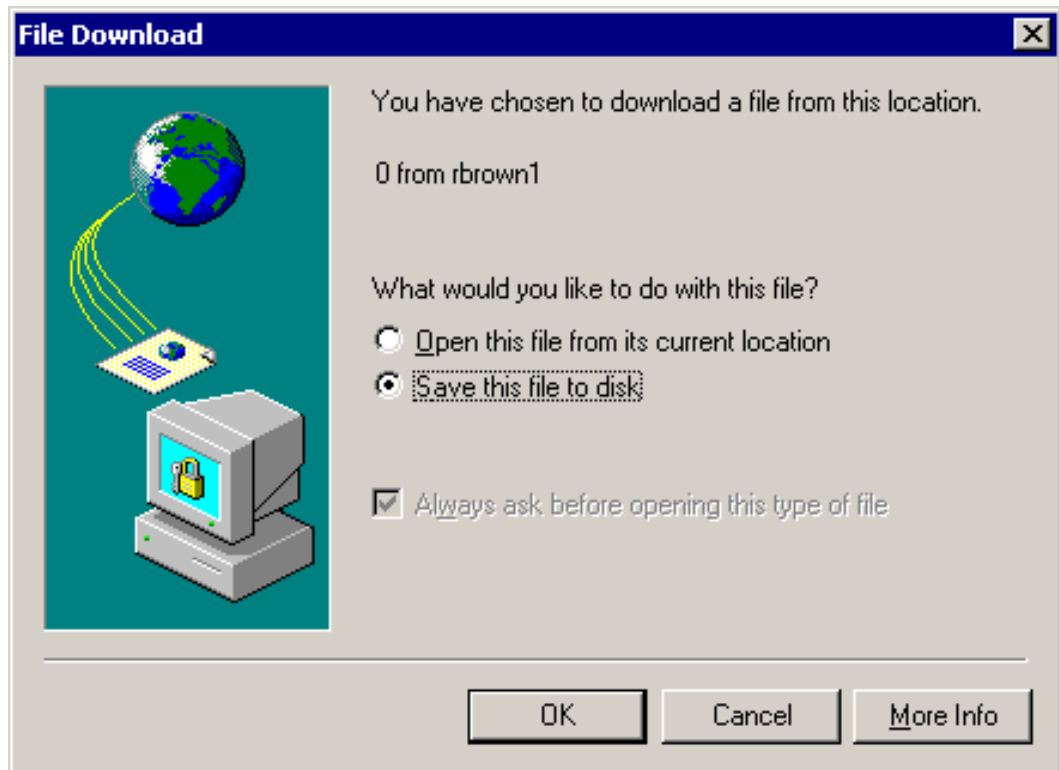
ATTACHED FILE: List of Pending May Orders.doc  
 VERSION: 1  
 SIZE: 22.5 Kb.  
 DESCRIPTION: List of May Pending Orders  
 REMARKS: Please, take into account the information in this file.  
 CONTENT TYPE: application/msword

Please press 'Download' to get the file, then press 'Download Ok' on downloading success. Remember to save the file in your local working directory /temp/.

Download
 Download Ok
 Cancel

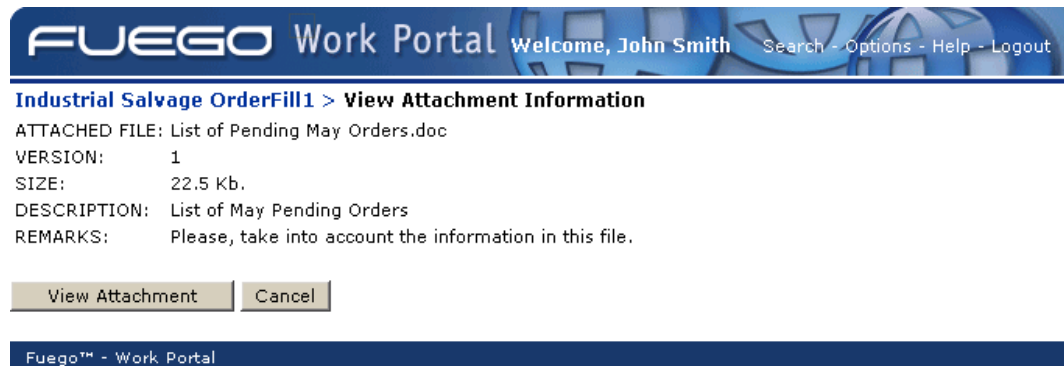
FuegoBPM™ - Work Portal

- Click **Download**. The **File Download** dialog box appears.




- Select *Save this file to disk*. Then click **OK**.

5. Select the directory path where you want to save the file. Then click **Save**.
6. Click **Download Ok**. The **View Attachment Information** window appears.



7. Click **View Attachment**. The document appears and is ready for editing.
8. Edit the file. When complete, save your changes and close the file.

### Note

 The **Locker** column must be blank to edit the attachment.

If you have chosen the **ENABLE APPLET FOR ATTACHMENT MANAGEMENT** option in the **Options** window, you may bypass steps 3-6 and simply click on the file name to begin editing. See Customizing Your Work Portal for further information.

## Launching attachments

In the **Options** window, two options work together to provide an easier way to edit attachments.

These options allow you to edit an attachment in Work Portal by automatically launching it in its appropriate application according to the file extension. For example, if an Excel spreadsheet is attached,

then Excel will be launched on your computer and you will be able to view or edit the spreadsheet from Excel.

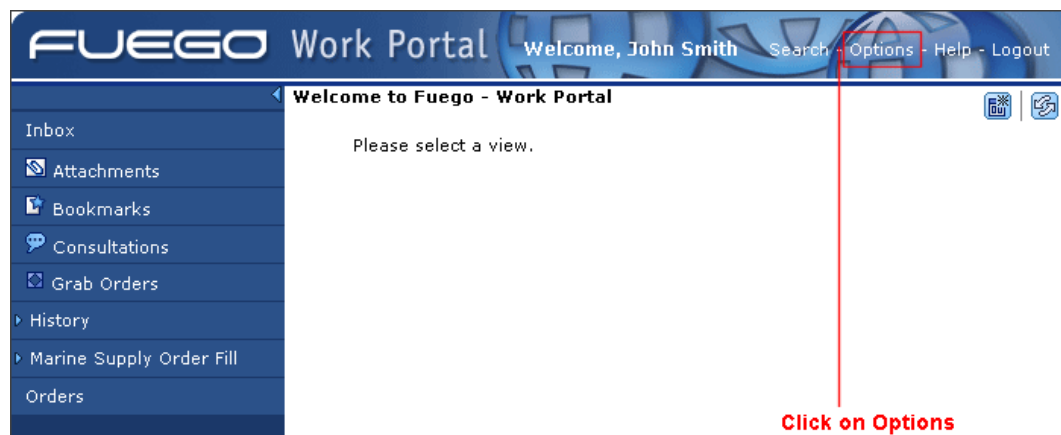
The association is valid only when

- editing the file, or
- viewing the file, given that it is locked by the user.

If the file is not locked, either by clicking on the file name link or on the view icon the file using the default program should be opened, and not the program specified in the associations list.

To configure your Work Portal so that you can launch attachments,

1. Click the **Options** link on the top right of your Work Portal window.



2. The **Options** window opens. Select the **Enable applet for attachment management:** check box.



Options		Help
<b>User Information</b>		
Full Name:	fuego	
Login Name:	fuego	
E-mail:		
<b>Browser settings</b>		
Enable Flash version menu:	<input type="checkbox"/>	
Enable DHTML support:	<input checked="" type="checkbox"/>	
<b>Settings</b>		
Sort instances by:	Received	
Instances order:	Ascending	
Instances date format:	10:40 AM (1 hour ago), 8 Oct (1 day ago), ...	
Show hidden views:	<input type="checkbox"/>	
Follow the Instance:	<input type="checkbox"/>	
Notify me by e-mail when new instances arrive:	<input type="checkbox"/>	
Keep instance view:	<input type="checkbox"/>	
Enable applet for attachment management:	<input type="checkbox"/>	
Enable remote scripting for FuegoObject presentations:	<input checked="" type="checkbox"/>	
Show applications:	In a folder	
User Working Directory:	/temp/	
	(Including last path separator. ie.: 'c:\temp\').	
Maximum number of searches in history:	10	
<b>Display options</b>		
Number of instances:	10	
Language:	English	
Country:	United States	
TimeZone:	GMT-03:00	
<input type="button" value="Save"/> <input type="button" value="Close"/>		
Fuego™ - Work Portal		

- Click Save. A new link called **Change Associations** appears under the check box.

Enable applet for attachment management:	<input checked="" type="checkbox"/>
File Type / Application Association:	<a href="#">Change Associations</a>

- Click the Change Associations link. The **File Type / Application Association** window appears.

Extension	Application Path	Parameters
<input type="button" value="New"/> ppt	C:\Program Files\Micro <input type="button" value="Browse"/>	<input type="text"/> <input type="button" value="Delete"/>
fpr	C:\fuego5.0\studio\bin <input type="button" value="Browse"/>	<input type="text"/> <input type="button" value="Delete"/>
xls	C:\Program Files\Micro <input type="button" value="Browse"/>	<input type="text"/> <input type="button" value="Delete"/>
doc	C:\Program Files\Micro <input type="button" value="Browse"/>	<input type="text"/> <input type="button" value="Delete"/>

5. Type the file extension of the application(s) corresponding to the attachments you want to view or edit.
6. Type the file path where the application's executable file is located.
7. Type parameters as necessary (optional).
8. Click **Save** . The **Options** window reappears.
9. **User Working Directory** is only used by the portal when applets are enabled. If applets are not enabled, you should save the file first to any directory you wish.
10. Click **Close** to return to the Work Portal.

## Applet not enabled

If applets are not enabled, in order to manage attachment, you have to:



1. Click on the **Edit** icon.
2. Save the file to disk.
3. Edit the file with the corresponding tool and save it.

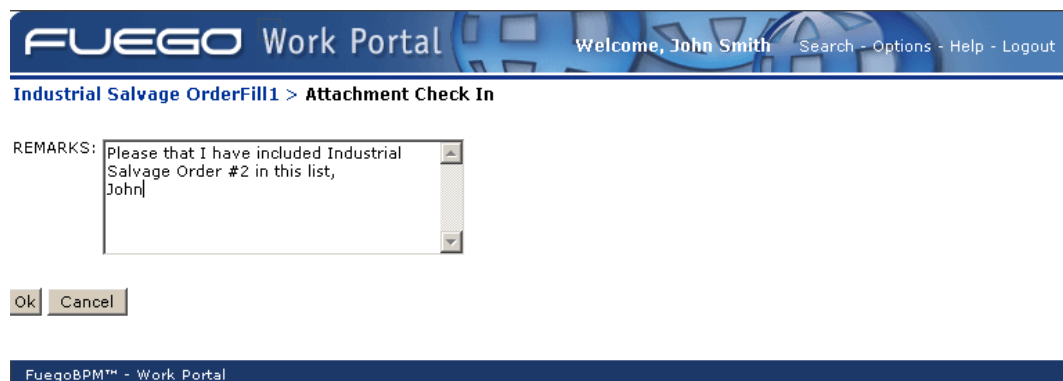
- Click on the **CheckIn** icon and select the modified file.

## Checking in an edited attached file

After you finish editing an attached file and saving your changes, you must check-in the file so that other users can view your changes.

**To check-in an edited file so that others can view your changes**

- Click the description of the appropriate instance.
- In the **Attachments**  section of the task panel, click the **Attachment Check-in** button  located under the **Action** column next to the appropriate file name. The *Attachment Check In* window appears.
- Type in the **REMARKS:** text box any relevant information about the modifications.





- Click **Ok** to return to the previous window. The **Attachment Check-in** button is dimmed. Your name is displayed in the **Locker** column (if you are not the creator.) This means that no one else has permission to change the attachment. Only you can release the attachment for editing by others. See Releasing a locked file.


## Releasing a locked attached file

When you edit a file, you automatically place an edition lock on that file so no other user can edit it. If you want to allow other users to edit the file, you can simply release the edition lock.

To release a locked file:

1. Click on the description of the appropriate instance.
2. In the **Attachments**  section of the task panel, click on the **Release** button  located under the **Action** column next to the appropriate file name. Your name disappears from the **Locker** column. The attachment can now be edited by others.







### Note

 Only the last person who has edited a file can release this file.

## Understanding attachment information columns



When you click on an instance description in the instance information panel, the task information panel for that instance is displayed. The attachments section is visible in the lower portion of the panel.





### Example:

Attachments 						
Name	Version	Creator	Filename	Date	Locked by	Action
<a href="#">List of Clients</a>	1	Part1	clientFile.xls	Jun 8, 2005 4:32:42 PM		    

Click below for a description of each column in the attachments section of the task information panel.

**Attachments Info Column Descriptions**

Column Name	Description
Name	Displays the attachment name. You can view the file by clicking on the name. See <b>Notes</b> below
Version	Displays the version of the attachment. If someone has modified the attachment since it was first attached, the version number will be greater than 1.
Creator	Displays the user who attached the file.
Filename	Displays the filename as it is saved on the process server. Includes a datestamp, timestamp and version number.
Date	Shows the time in which the attachment has been inserted or last modified
Locked by	Default is blank. If you or another user have edited the attachment by clicking on the <b>Edit</b> button  in the Action column, your name or the other user's name is displayed in this column. When there is a name in this column, only that person can make modifications to the attachment until the modification is checked in. All others can only read the attachment.
Action	Displays the various actions that the user can perform for the associated attachment: <b>View</b>  Displays information about the file, including

Column Name	Description
	<p>the name, version, description and remarks. <b>Edit</b>  Allows you to open the file and make modifications to it.</p> <p><b>Check-in</b>  Saves any changes you made to the attached file so other users may view these changes.</p> <p><b>Release</b>  Releases an edition-locked file. <b>Versions</b>  Displays all versions of the file. You can select a previous version of the file to view.</p>

### Note



By clicking on the attachment, the file will be launched in its own application if you have chosen the ENABLE APPLLET FOR ATTACHMENT MANAGEMENT option in the **Options** window. See Customizing Your Work Portal for further information.

## Understanding attachment views

You might have an Attachments' view created by the Administrator in order to be able to check the attachments of your instances.

If this is the case, you will see it in the left panel of Work Portal. By clicking the Attachments view, the right panel displays **all** attachments which you have either created or edited, and then locked.

FUEGO Work Portal

Welcome, John Smith

Search - Options - Help - Logout

Inbox

Applications

**Attachments**





Bookmarks

Consultations

History

FuegoBPM™ - Work Portal

Attachments

Name	Version	Creator	Size	File name	Locked	Action
<u>List of Pending May Orders</u>	1	John Smith	23040	List of Pending May Orders.doc	John Smith	   

Attachments locked by the user

---


## Chapter 8. Notes

### Adding a Note

Any user can add a note to any instance that has not been processed or completed in its folder. Other users who work with the instance later in the process can also access any notes previously added and then add a note of their own, if they want to.

The Orchestration Server may also automatically add notes to an instance as it flows through the process. These notes indicate the status of the instance and other information, such as the number of times the retry limit was exceeded for its connecting to a database. These notes appear identical to end user-added notes.

#### To add a note to an instance

1. Click the description of the appropriate instance.
2. Click the **New Notes** button  in the lower portion of your screen. The **New Note** dialog box appears.



**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Inbox > Diving Supply OrderFill5**


**Details**

<b>Process:</b>	Marine Supply Order Fill	<b>Activity:</b>	Review Order
<b>Priority:</b>	Normal	<b>Status:</b>	Running
<b>Received:</b>	Feb 22, 2005 3:18:56 PM	<b>Deadline:</b>	
<b>Participant:</b>		<b>Copy:</b>	0


**Process Owner Image** **Optional applications**

**Process Definition Image:**

Task	Participant	Status	Mandatory	Repeatable	Last execution
Review Order		Pending	✓		
Mail		Pending		✓	

**Notes**  Click to add a new note

Description	Date	Participant	Activity
No notes available.			

**Attachments** 

Name	Version	Creator	Filename	Locked by	Action
No attachments available.					

FuegoBPM™ - Work Portal

3. Type your comments and click **Ok**.

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Diving Supply OrderFill5 > New Note**

Mary,  
please doublecheck this customer's  
credit limit to make sure it has not  
been exceeded.  
Thanks.


**Ok** **Cancel**

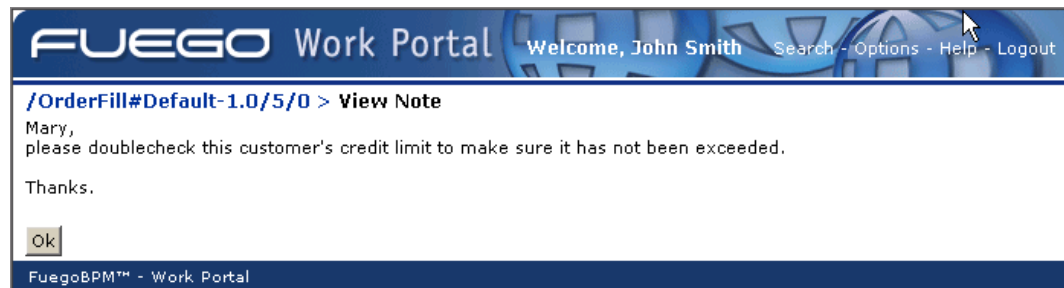
FuegoBPM™ - Work Portal

# Viewing Notes

Any user can view a note attached to an instance. Notes can contain special instructions from a participant earlier in the process or it may have been automatically attached by the system. In any case, if you see that a note has been attached to an instance, it is usually a good idea to take a moment to view and read it.


## To view a note

1. Click the description of the appropriate instance. All notes associated to that instance are listed under the **Notes**  section in the lower portion of the Task panel.
2. Click ( **View** ) next to the description of the note you want to view. The note appears.



3. When you have finished viewing the note, click **Ok** to return to the previous window.

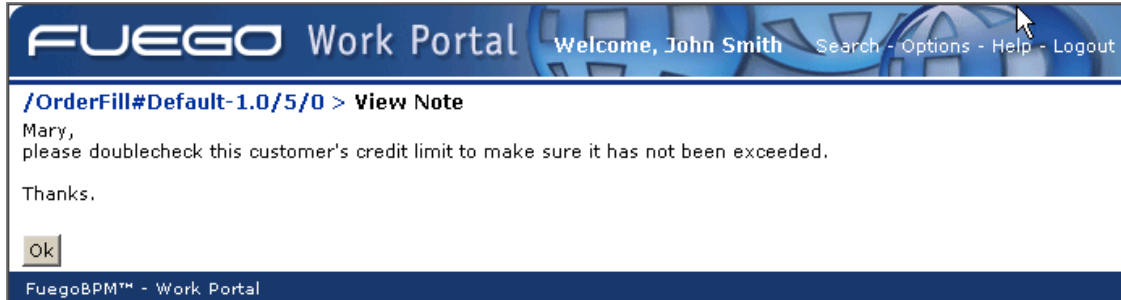
## Understanding notes information columns

When you click on an instance description in the instance information panel, the task information panel for that instance appears. The Notes  section is visible in the lower portion of the panel.

## Notes

Description	Date	Participant	Activity
Mary, ... <a href="#">(View)</a>	2/03/2004 09:24:45	John Smith	ReviewOrder

When you click on **View** a window displays the complete note text:



The screenshot shows the FUEGO Work Portal interface. At the top, there is a header bar with the FUEGO logo, the text "Work Portal", and a welcome message "Welcome, John Smith". To the right of the welcome message are links for "Search", "Options", "Help", and "Logout". Below the header, the breadcrumb path is "/OrderFill#Default-1.0/5/0 > View Note". The main content area displays the text of the note: "Mary, please doublecheck this customer's credit limit to make sure it has not been exceeded. Thanks." At the bottom of the note content is an "Ok" button. The footer of the portal says "FuegoBPM™ - Work Portal".

## Notes Info Column Descriptions

Column Name	Description
Description	Displays the first 20 characters of the note. Click <a href="#">(View)</a> to see the full text of the note.
Date	Displays the date and time on which the note was added.
Participant	Displays the author of the note.
Activity	Displays the activity where the instance was located when the note was added.

---


# Chapter 9. Audit Trail

## Using audit trail

Audit Trail lets you see all past activities associated to a particular process instance. This includes events, activities, the participants (users) who processed a particular event, date and time for each event and all copies of events, and the process image showing the flow path of the instance through the process and the actual location of the instance.

The audit trail information might not be available because process designers determine whether it is necessary for each business process to generate the audit information.

### To view the audit trail for an instance

1. In Work Portal, click the appropriate view listed in the left column. The instances associated to that view are listed in the instances panel.
2. Click the description of the appropriate instance.
3. Click the **Audit Trail** button  at the top-right corner of the Work Portal. The *Audit Trail* window displays in a separate browser window.

Audit trail
Help

**Marine Supply Order Fill > Check Freight > Diving Supply OrderFill5**

Activity	Event	Responsible	Date	Copy
<a href="#">Create Order</a>	Completed		Feb 22, 2005 3:18:56 PM	0
<a href="#">Review Order</a>	Completed		Feb 22, 2005 3:18:56 PM	0
<a href="#">Check Freight</a>	Processing		Feb 22, 2005 4:43:06 PM	0
	Enter	Shipping Clerk	Feb 22, 2005 4:43:06 PM	0
	✓Task Check Freight executed	John Smith	Feb 22, 2005 4:43:37 PM	0

**▼ Process Image**

Close

FuegoBPM™ - Work Portal

4. Click the plus sign next to an activity to view further detailed information on that activity.

Audit trail
Help

**Marine Supply Order Fill > Check Freight > Diving Supply OrderFill5**

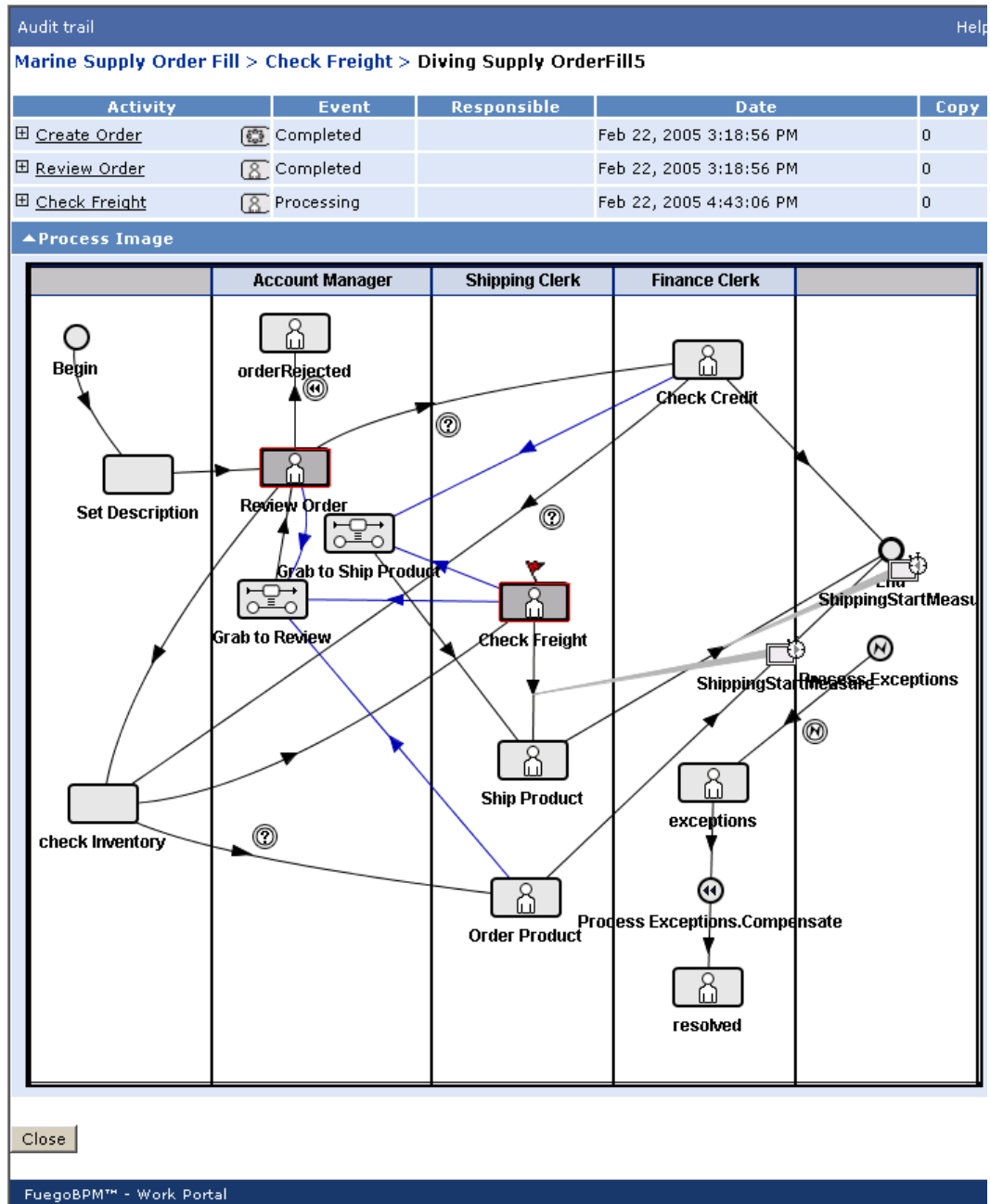
Activity	Event	Responsible	Date	Copy
<a href="#">Create Order</a>	Completed		Feb 22, 2005 3:18:56 PM	0
	Creation	John Smith	Feb 22, 2005 3:18:56 PM	0
<a href="#">Review Order</a>	Completed		Feb 22, 2005 3:18:56 PM	0
	Enter	Account Manager	Feb 22, 2005 3:18:56 PM	0
	✓Task Review Order executed	John Smith	Feb 22, 2005 4:43:02 PM	0
	Exit	John Smith	Feb 22, 2005 4:43:05 PM	0
<a href="#">Check Freight</a>	Processing		Feb 22, 2005 4:43:06 PM	0
	Enter	Shipping Clerk	Feb 22, 2005 4:43:06 PM	0
	✓Task Check Freight executed	John Smith	Feb 22, 2005 4:43:37 PM	0

**▼ Process Image**

Close

FuegoBPM™ - Work Portal

5. Audit trail also includes the Process Image, which shows all past activities and transitions associated to the instance. Activities included in the instance path are outlined in a different color. A red flag indicates in which activity the instance is in that moment.




- Measurement Mark activities are included in the Audit trail as shown in the picture below.

Audit trail					Help
Marine Supply Order Fill > End > Diving Supply OrderFill5					
Activity	Event	Responsible	Date	Copy	
Create Order	Completed		Feb 22, 2005 3:18:56 PM	0	
Review Order	Completed		Feb 22, 2005 3:18:56 PM	0	
Check Freight	Completed		Feb 22, 2005 4:43:06 PM	0	
ShippingStartMeasure	Completed		Feb 22, 2005 4:50:48 PM	0	
Measurement Start	Measurement Start	John Smith	Feb 22, 2005 4:50:48 PM	0	
	• orderAmount = 23000.00		Feb 22, 2005 4:50:48 PM	0	
Ship Product	Completed		Feb 22, 2005 4:50:48 PM	0	
ShippingStopMeasurement	Completed		Feb 22, 2005 4:51:13 PM	0	
Measurement Stop	Measurement Stop	John Smith	Feb 22, 2005 4:51:13 PM	0	
	• Elapsed Time = 25s		Feb 22, 2005 4:51:13 PM	0	
	• orderAmount = 23000.00		Feb 22, 2005 4:51:13 PM	0	
End	Completed		Feb 22, 2005 4:51:13 PM	0	
▼ Process Image					
<div>Close</div> <div>Measurement Mark started</div> <div>Measurement Mark stopped</div>					
FuegoBPM™ - Work Portal					

In this example, the measurement marks for collecting Key Performance Indicator data (KPI) about the shipping, also store the business variable *orderAmount*. The business variables are shown both, in the measure start and stop, and the elapsed time is shown in the measurement mark stop. Whether you would see, measure starts separately from the stop would depend on the business process design.





- Click **Close** to exit the **Audit Trail** window and return to the Work Portal.

## Understanding audit trail information columns

When you click on the **Audit Trail** button , the **Audit trail** window appears and detailed information is provided for the instance.

Audit trail
Help

[Marine Supply Order Fill](#) > [Check Freight](#) > [Diving Supply OrderFill5](#)

Activity	Event	Responsible	Date	Copy
 <a href="#">Create Order</a>	Completed		Feb 22, 2005 3:18:56 PM	0
 <a href="#">Review Order</a>	Completed		Feb 22, 2005 3:18:56 PM	0
 <a href="#">Check Freight</a>	Processing		Feb 22, 2005 4:43:06 PM	0
	Enter	Shipping Clerk	Feb 22, 2005 4:43:06 PM	0
	 Task Check Freight executed	John Smith	Feb 22, 2005 4:43:37 PM	0

[▼ Process Image](#)

Close

FuegoBPM™ - Work Portal


## Audit Trail Info Column Descriptions

Column Name	Description
Activity	Displays each activity, in order, where each event took place.
Event	Displays the event associated with each activity on the left. An Enter and an Exit event is associated to every activity. <b>Note:</b> The Begin activity will have a <b>Creation</b> instead of an <b>Enter</b> event. Interactive activities will have additional events that occur between the Enter and Exit events.
Responsible	Displays the person or role that processed or selected the activity for the associated instance.
Date	Displays the completion date and time for the associated event.
Copy	Displays the number of copy where the associated event occurred. If several copies of the instance were



Column Name	Description
	created as the result of a split/re-join process, all events for each copy are displayed. Each event has a different copy number.

### Note

 In some processes, Audit trail functionality may not be provided. Check with your system administrator.

---

# Chapter 10. Using the Grab Activity

## Using the Grab Activity

Grab activities are created in order to provide some users with the ability to modify the normal course of instances through the process path.

The grab activity allows you to pull an instance from another activity and to put it into your folder. This instance will remain there until you decide to process it, abort it or send it back to the activity from which you grabbed it. Grabbing an instance is useful to prevent or alleviate a backlog of instances.


Depending on how the activity was defined by the process designer, it provides the possibility to grab instances from any other activity or only for a subset of activities of the process.

If you have been authorized to grab instances, you are likely to have an activity instances view for the grab activity. Grab views are identified with a special icon and are designed to list all the grabbed instances in the corresponding grab activity.

If this is not the case, you can use the **Search** function to find the instances you want to grab and, from the search results, grab the instances.

See Grabbing instances for details on how to grab instances.

### Note

 If there is no grab activity visible in your Work Portal and the searches do not find any instances to grab, this means that either there is no grab activity designed in the process or that you do not have any authority to perform grabs.

## Grabbing an Instance

Depending on how the Administrator has defined the set of available

views for your roles, you will have the possibility to grab instances in one of the following ways:



1. Using a **grab** view and **searching for grab**.
2. Searching for instances you want to grab.


The first option will be available if you see the grab icon next to the view label in the views' tree of your Work Portal.


If this is not the case, you can search for the instances to grab using the **Search** option and grab instances from the search result list.

## Grabbing an instance from the Inbox

If you have grab permissions and the instance can be grabbed according to the process desing, then the grab icon

 /  appears in the instance line.

: means that the instance can be grabbed only from one grab activity.

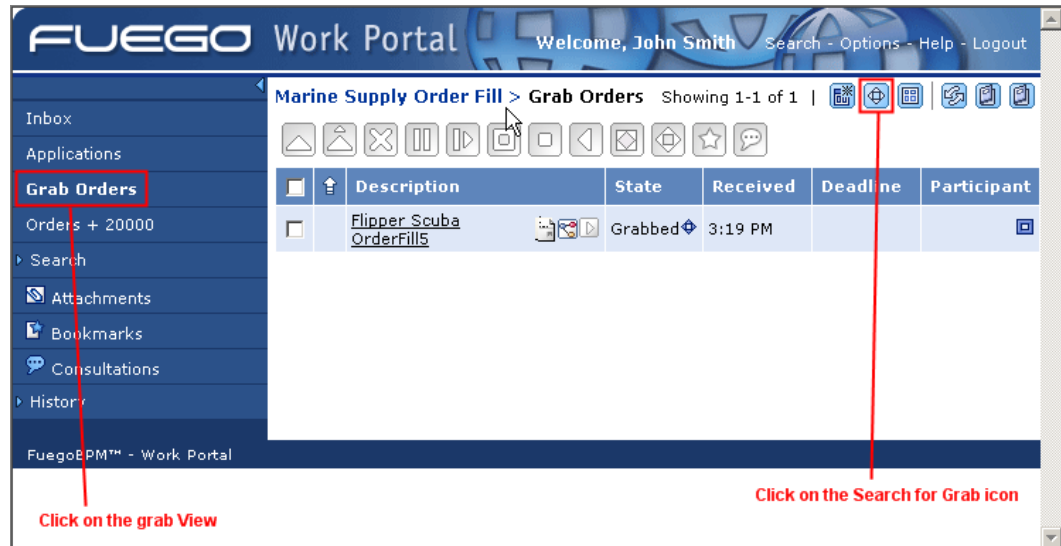
: means that the instance can be grabbed from more than one grab activity.

The screenshot shows the FUEGO Work Portal interface. The top header includes the logo, user name 'John Smith', and navigation links. A left sidebar contains a menu with 'Inbox', 'Applications', 'Orders + 20000', 'Attachments', 'Bookmarks', 'Consultations', and 'History'. The main area displays an 'Inbox' table with 5 items. A context menu is open over the 'Grab' icon in the fifth row, showing options 'Grab to Ship Product' and 'Grab to Review'.

		Description	State	Activity	Participant	Payment type	Order Amount
<input type="checkbox"/>		Scubapro Dive Shops OrderFill6	Running	Review Order		cash	880.60
<input type="checkbox"/>		Diving Supply OrderFill1	Running	Review Order		cash	20.00
<input type="checkbox"/>		Flipper Scuba OrderFill4	Running	Ship Product		credit	22,015.00
<input type="checkbox"/>		Flipper Scuba OrderFill2	Running	Review Order		credit	2,400.00
<input type="checkbox"/>		Flipper Scuba OrderFill5	Running	Check Receipt		credit	30,821.00

## How to grab instances from a *grab* view

1. If one of the views that is available in your Work Portal corresponds to an activity designed to take or "grab" instances from one activity that sends them to other activities to be processed, click on that view in the menu views tree. The grab views are identified with the grab icon . The **Search for Grab** button will be available for you to search for instances first and to grab them later.



2. When clicking on **Search for Grab** icon, the **Search** page appears. The page is set with the process to which the activity belongs, and this setting cannot be edited.

Search Options

Help

Search

Clear

Close

✓ Processes

☐ nonParametricRoles

☒ Marine Supply Order Fill

☐ usingParametricRoles

Filter Options

Get Instances Assigned To: 

All

Case Sensitive Matching: ☐

Include Instances

☒ In process

☐ Completed

☐ Aborted

Conditions

Match all of the following ☐

Add Condition: 

Activity

+

Search

Clear


Close




Filter Description


Searching instances in the selected processes where

Fuego™ - Work Portal

3. Set the search conditions with the suitable values to find the instances you need to grab. Use the same criteria that you would apply to perform a common search. See Searching for instances further details.
4. Once you have entered the search criteria, click on **Search** button. The search result displays all the instances that match the entered criteria and that can be grabbed.



 **09:56:11** Showing 1-3 of 3

Description	State	▲ Received	Activity	Participant	Payment type	Order Amount	Initiator
<a href="#">Diving Supply OrderFill3</a>	 Running	09:51:07	Check Freight		credit	653.86	John Smith
<a href="#">Scubapro Dive Shops OrderFill2</a>	 Running	09:51:41	Check Freight		cash	29,302.00	John Smith
<a href="#">Industrial Salvage OrderFill1</a>	 Running	09:55:43	Check Credit		credit	27,092.00	John Smith




**Filter Description** 

Searching instances in the selected processes where

Fuego™ - Work Portal

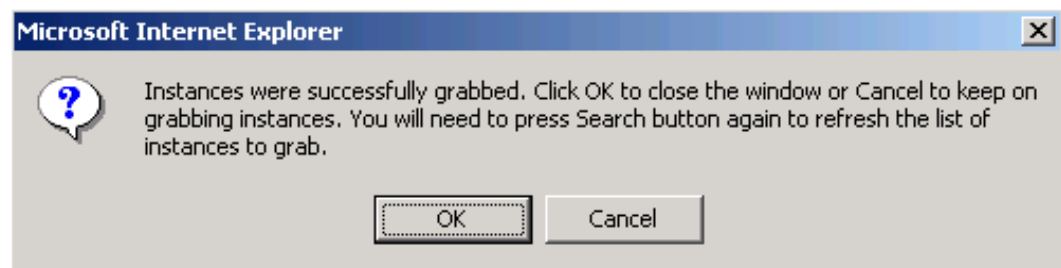
- To grab an instance, click on the grab icon that appears next to the instance description  or use the **Grab All Instances** icon that appears at the top of the list to grab all the instances found at the same time. The instances are sent to the grab activity from which you launch the search for the grab action. From there, you can decide what to do with the grabbed instances.
- If no grab view is available and you have an authorization to grab instances, you can use the **Search** function to search for instances to grab. The search result will display all instances that match the criteria, no matter whether they can be grabbed or not. The grab icon appears only for those instances that can be grabbed. The **Search All Instances** icon does not appear since the instances found could be grabbed for more than one grab activity. In such cases, a different icon  appears next to the instance to indicate that the instance can be grabbed for more than one grab activity.

10:51:35 Showing 1-3 of 3

Description	State	Received	Activity	Participant	Payment type	Order Amount	Initiator
Diving Supply OrderFill3	 Running	09:51:07	Check Freight		credit	653.86	John Smith
Scubapro Dive Shops OrderFill2	 Running	09:51:41	Check Freight		cash	29,302.00	John Smith
Industrial Salvage OrderFill1	 Running	09:53:43	Check Credit		credit	27,092.00	John Smith

When the mouse is over the icon, a menu displays all the grab activities where the instance might be grabbed. Select the appropriate option.

- In any case, a dialog box appears when you click on the grab icon or choose the grab option. When you finish grabbing instances, click **OK** to close the **Search** window and return to the main Work Portal panel. If you want to keep on grabbing instances, click **Cancel**.



- Click **Close** to return to Work Portal's main panel. The instance or instances appear with Grabbed status in your **Grab** view, if it exists or is in the available views. You can now decide what to do with the grabbed instance.



The screenshot displays the FUEGO Work Portal interface. The main content area shows an 'Inbox' table with the following data:

	Description	State	Activity	Participant	Payment type	Order Amount
<input type="checkbox"/>	Scubapro Dive Shops OrderFill6	Running	Review Order		cash	880.60
<input type="checkbox"/>	Diving Supply OrderFill1	Running	Review Order		cash	20.00
<input type="checkbox"/>	Flipper Scuba OrderFill4	Running	Ship Product		credit	22,015.
<input type="checkbox"/>	Flipper Scuba OrderFill2	Running	Review Order		credit	2,400.0
<input type="checkbox"/>	Flipper Scuba OrderFill5	Grabbed	Grab to Review		credit	30,821.


The last row, 'Flipper Scuba OrderFill5', is highlighted with a red box and labeled 'Grabbed Instance' with a red arrow. The interface includes a sidebar with navigation links like 'Inbox', 'Applications', 'Grab Orders', and 'Search'. The top bar shows 'Welcome, John Smith' and navigation links like 'Search - Options - Help - Logout'.

Every time you click the **Search** button in the **Search for Grab** window, a temporary view is created in order to keep a history of the searches made by the user in the current session.

The view is given the name of the time at which the search was made.


This temporary view is displayed in the left panel of Work Portal under a new folder called **Search for Grab**.

You can set the maximum number of searches you want to be displayed in the **Options** window. These views are deleted when you log out. See the **Creating a view** help topic on how to save one or more of these views.

Within these **Search** views, is the only place where the grab icon  is enabled. After performing a **Search for Grab**, if you close the search window and go to the corresponding Search view, you will see the list of instances that can be grabbed and the grab icon will

be enabled. You can perform a grab for more than one instance just selecting them and then clicking the grab icon.

### Tip

 If you click **Cancel** and return to the **Search for Grab** window after grabbing an activity, you must click the **Search** button again to update the list of remaining instances to be grabbed.

## How to grab instances if there is not a *grab view*


If you have been authorized to grab instances, you are likely to have an activity instances view for the grab activity. Grab views are identified with a special icon and are designed to list all the grabbed instances in the corresponding grab activity.

If this is not the case, you can use the **Search** function to find the instances you want to grab and, from the search results, grab the instances. See Searching for instances step 10.

## Ungrabbing an Instance

Click the **unGrab Instance** button to send an unprocessed instance back to the activity from which you had grabbed it.



### To unGrab an instance without processing it

- Click the **unGrab Instance** button  in the **Status** column in the **Grab** activity folder. The instance is returned to the activity from which you had grabbed it. Processing continues normally.

**FUEGO Work Portal** Welcome, John Smith Search - Options - Help - Logout

**Marine Supply Order Fill > Grab Orders** Showing 1-1 of 1

Icons: [Up] [Down] [Close] [Pause] [Play] [Reset] [Previous] [Next] [Star] [Comment]

	Description	State	Received	Deadline	Participant
<input type="checkbox"/>	<a href="#">Flipper Scuba OrderFill5</a>	Grabbed 	3:19 PM		

**Click to unGrab instance**

FuegoBPM™ - Work Portal

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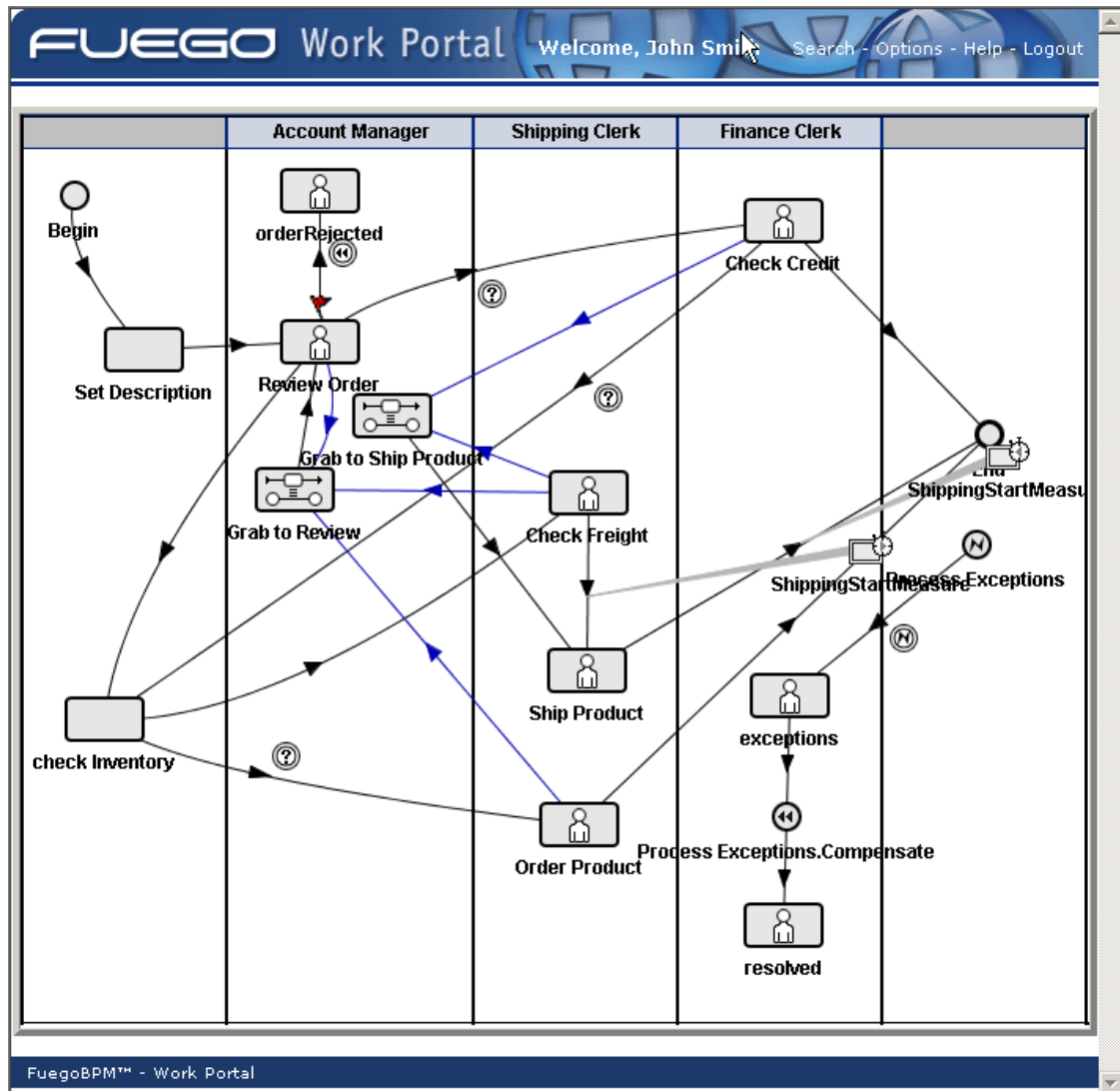
# Chapter 11. Business Monitoring

## In Business Monitoring

FuegoBPM enables Work Portal users to view the image of the process with process information attached to it. This information on top of the business process image can help you identify distribution of instances into the business process activities, have a notion of flow progression as well as be able to identify particular instances within the context of the business process at hand.

### Viewing the Process Image

By clicking on the **Process Image**  icon the process image is displayed in a new window.



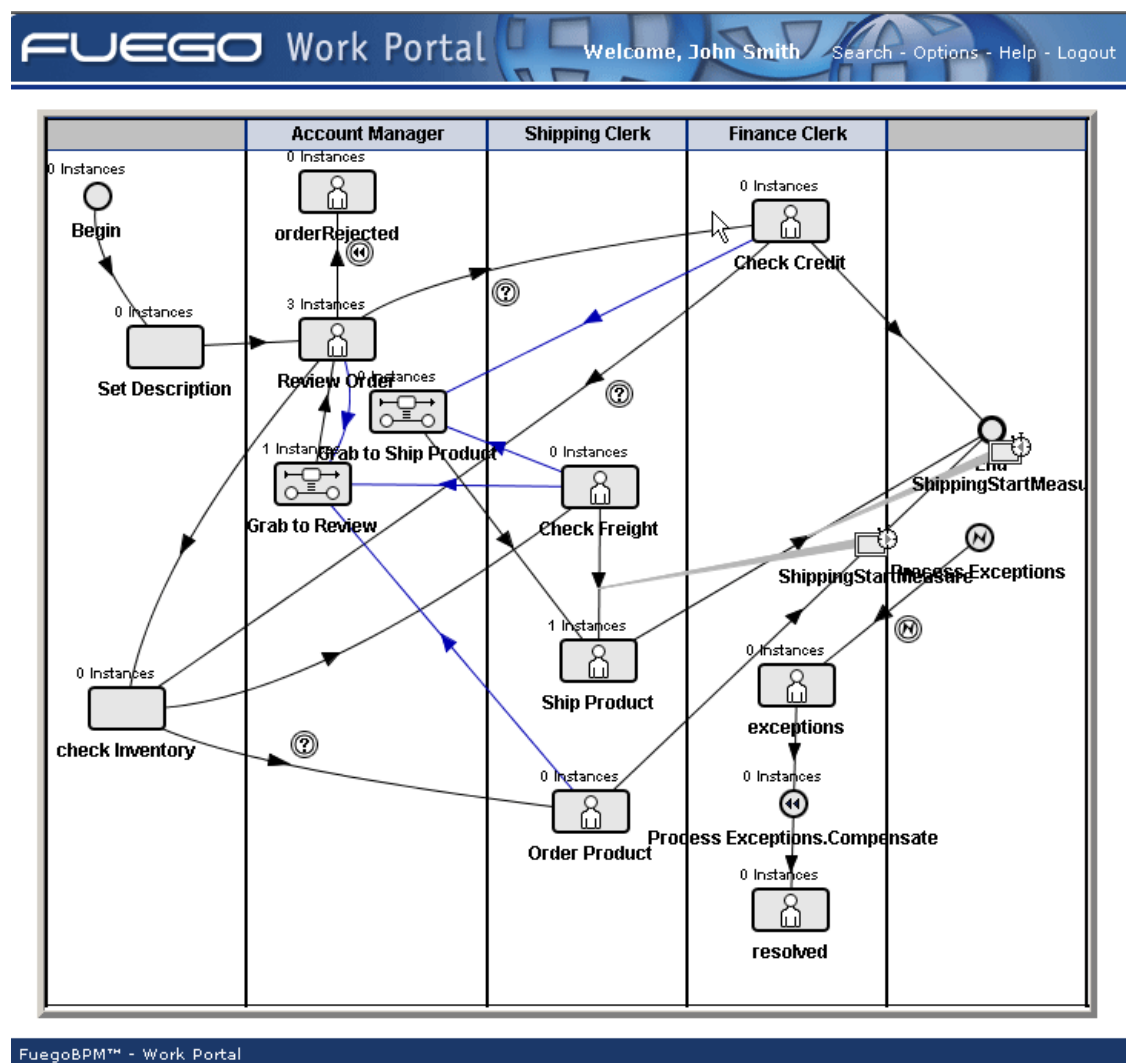
The process image displays the definition of the process including all the process elements. The flag in one of the process activities indicates the current location of the instance from which this function was requested.

The process image corresponds to the instance's process version. Therefore, the number of instances in each activity includes only the instances that belong to the same process' version of the instance for which the process image was requested. It does not consolidate the number of instances for all the process' versions.

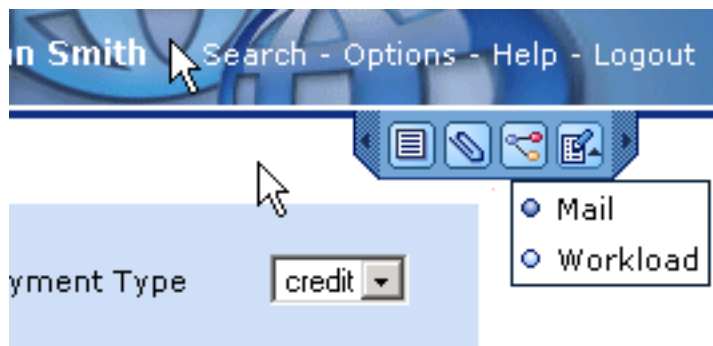
## Viewing the Process Workload

The process design may include an application to view the Process Workload. You find them in the **Applications** default view. By clicking this application, an image showing the process workload is displayed.

Above each activity, the quantity of instances being processed in it is displayed.



If a workload activity has been included in the process design, it is displayed as an optional task when executing an instance. In the image shown below, the application name is *Workload*.



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# Chapter 12. Troubleshooting

## Troubleshooting

### **Displayed Error: Error executing a component. Contact the administrator.**

If this message displays when you are processing in the FuegoBPM Work Portal it is because an exception has occurred. To send the administrator the information he needs to solve the problem, follow the next steps:

1. With the **Error Message** still displayed in your browser, go to the **File** menu of the browser and select the option **Save As**.
2. A dialog to choose the directory where to save the file is displayed. Browse to the directory in which you want to save the page with error.
3. Give the file a name and click **Save**.

By doing this, you are saving the error message to a file from which the administrator can identify which was the problem by watching its code.