



ALBPM WorkSpace

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Workspace Overview

Workspace is the AquaLogic BPM Suite component that you use to carry out tasks that are part of a *business process*.

BPM stands for *Business Process Management*, a technique by which the various activities carried out in an organization are sequenced and organized into explicitly defined business processes.

The AquaLogic BPM Suite is made up of several components that can be used to design, implement, simulate, deploy and work with business processes defined in software. A business process generally includes tasks done automatically as well as tasks which require human interaction. Workspace is the component that provides an interface for the human activities in the business process.

For a more detailed description of business processes, you can read [What Is a Business Process?](#) on page 4

What can you do with Workspace?

Workspace is the application that you use to interact with business processes based on the roles assigned to you. Workspace is a Web application, so it will work from any browser with access to the Workspace application server.

With Workspace, you can manage [What Is a Process Instance?](#) on page 5, get information about business processes, interact with other participants, and perform tasks. Specifically, with Workspace you may:

- View the list of process instances pending in your inbox
- Execute tasks. That is, carry out an interactive activity on a particular instance.
- [Searching for Instances](#) on page 11 by different criteria
- [Saving a View](#) on page 12
- [Instance Detail Panel](#) on page 13, including the [Viewing an Audit Trail](#) on page 17
- Assign an instance to yourself. This effectively locks it for your exclusive use.
- Create a new instance, if you have permission to do so.
- [Adding Attachments](#) on page 16 to an instance
- [Adding Notes](#) on page 15 to an instance
- [Bookmarking Instances](#) on page 13

The Workspace main page contains *panels*, each of which has a specific function. Four panels are available by default:

- [Applications Panel](#) on page 8
- [Views Panel](#) on page 8
- [Work List Panel](#) on page 9
- [Instance Detail Panel](#) on page 13

A Note on Instances

Throughout the Workspace documentation, the term *instance* is used to denote a given item of work as it travels through the business process. Instance is a generic term, and in your particular environment you may never actually talk about instances. Instead, users will usually think about the specific job they are doing. If you handle purchase orders, your term for instance could be *purchase order*. If you process loan applications your term might be *loan request*, or if you handle insurance claims your instance may be called a *claim application*, or simply a *claim*.

What Is a Business Process?

A business process represents a specific set of business tasks and activities which must be executed to reach a well-defined outcome. When this outcome is reached, the process is complete.

Examples of simple processes include hiring an employee, processing a sales order, or reimbursing a business expense. More complex business processes can also be designed according to the needs of a particular organization.

Sometimes it may not be possible to reach the main goal of the process. For example, the shipping clerk may have to cancel a sales order because the product is out of stock. Therefore, a business process must allow for different possible end conditions besides the principal objective of the process. Ideally it will allow more than one way to reach this objective. For instance, if the product is out of stock it may be possible to offer an equivalent alternative. In turn, this offer may be accepted or rejected. A range of possibilities can thus be included in the process.

The Happy Path

The most straightforward or "most expected", path through the process is frequently called the *happy path*. This path leads directly to the goal of the process. In the case of a purchase order, the happy path would go from order to delivery with no complications such as an out of stock condition.

When designing a process, it is usually a good idea to start out with the happy path, and gradually add the handling of more complex conditions to it. To make the design intention clear, it is also good practice to lay out the happy path as a straight line from left to right, and to show less common paths as deviations from the happy path.

Activities

Business processes are broken down into logical steps called *activities*, each of which can comprise one or more *tasks*. When activities are executed automatically by the system, they are called *automatic activities*. When human input is required, they are known as *interactive activities*. The activities of the business process are linked by *transitions*, which determine the order in which they are performed and the basic workflow for the process.

Roles and Participants

Each interactive activity belongs to a *role*. In turn, roles are assigned to *participants*, who are the actual individuals who interact with the process. A participant may have one role or many. The participants who can perform an activity are those who have been assigned the role the activity belongs to.

Exceptions

In the real world it is often impossible to predict every possible situation, so a business process usually includes a way to deal with *exceptions*. Exceptions are special situations where it is not possible to reach one of the normal pre-defined outcomes of the process. However, the process can include a way to handle these events and this usually involves calling attention to the situation so it can be resolved by one of the participants.

What Is a Process Instance?

If you think of a business process as a sequence of steps, then you can think of a process instance as a specific item going through those steps.

The following is a somewhat formal definition:

- A business process instance is a specific item proceeding through a business process.

For example, in a business process which handles purchases, each instance will be an individual purchase order. There can be any number of instances traversing a business process, as there can be any number of purchase orders going through a purchase order system.

Every instance has a specific history and properties. A purchase order usually contains a customer name, a list of items, an amount due, dates of delivery and payment, and other required data. An instance will also have various status conditions. In the case of a purchase order, you would want to know if it has been approved, if it has been paid for, or if the requested products have been shipped.

Each instance has a beginning and end, as defined in the business process. As the instance proceeds through the process, it will be worked on by various participants or processed automatically by software.



Note: In order to understand what a business process *instance* is, you must first understand the concept of a [What Is a Business Process?](#) on page 4.

Typical Workflow

In WorkSpace, a business process is executed in several automatic and manual steps. To illustrate how this works, we outline a typical workflow.

1. A participant logs in to WorkSpace. There may or may not be existing instances for the participant to work on. This is a function of the availability of instances in general, and also of the roles which are assigned to the participant.
2. If no instances are present, a participant with permission to generate an instance can do so. For example, in a purchase order process, a customer orders a product and the seller initiates a purchase order instance. Alternatively, the BPM system creates the instance automatically, for example due to a purchase being made from a Web site.
3. The BPM system generates the instance and makes it available to those participants assigned to roles that allow them to handle the first task of the instance.
4. One of the participants who can handle the first task sees the new instance in his inbox. The participant assesses the work required and views any notes and attached files included with the instance. If necessary, the participant can send a consultation to another participant to ask a question about the instance.
5. The participant executes the task. The appropriate application launches automatically, the participant enters the required information, and the task is submitted.
6. The BPM system processes the instance and sends it to the participant assigned to the next task. Depending on how the process is designed, a single participant can handle more than one task.
7. The next participant performs the task, and the BPM system processes it and sends the instance to the next task and participant.
8. The result of a given activity may determine the next activity chosen. For example, if the purchase order requires a product which is out of stock, the process will require a different activity than if the product is in stock.
9. Once the every task and activity applicable to an instance has been completed, the process is complete, and the instance ends.

Authentication in WorkSpace

To access WorkSpace, you must enter the username and password specified in your participant profile. If you do not enter the correct username and password, the login fails. If, after you have logged in, there is a period of idleness that reaches the configurable time limit, your session expires and you are prompted to log back in.

Panels Overview

The WorkSpace home page is divided into panels, each of which has a specific function.

As described in [WorkSpace Overview](#) on page 3, the following panels are available:

- [Applications Panel](#) on page 8
- [Views Panel](#) on page 8
- [Work List Panel](#) on page 9
- [Instance Detail Panel](#) on page 13

Refreshing a Panel


Sometimes you may wish to refresh the content of a panel. For instance, you may know that a new instance has been added to your Inbox or that the status of an existing instance has changed. In this case you would want to refresh the **Work List** panel.

To refresh any panel, click on the **Refresh**  icon in the panel title bar.

Applications Panel

The **Applications** panel is where you can perform basic WorkSpace actions, such as creating a new instance or performing a given activity.

The applications available in WorkSpace depend on the process design and the roles assigned to the user currently logged in. The list of applications available also depends on the BPM processes that are deployed and running. The applications panel will be empty if no processes are running, or if you are not a participant able to execute any application in whatever processes are running.

You may also access information about a given application in the **Applications** panel by clicking on the Documentation icon ().

Views Panel

If you work with a large number of instances, sometimes you need to see only a few of them at a time. To do this, WorkSpace has *views*.





A view is like a set of filters, or a query, which only retrieves instances that match whatever criteria was specified in the view definition. Views are displayed and created in the **Work List** panel, but you select a view from the **Views** panel.


The **Views** panel displays the views which are available to you in an expandable tree, such as that found in Windows Explorer and similar programs. By expanding and collapsing the tree branches, you can easily manage a large number of views. Views which are related go together, so for example the default History views all go into the History folder of the **Views** tree.

For instructions to create a view, see [Saving a View](#) on page 12.

Default Views

WorkSpace includes a number of convenient default views, described in this topic.

View	Description
Inbox 	Displays instances currently available to you. Instances become available based on role assignments, consultations, and assignments from other users.
Bookmarks 	Recalls instances that you have bookmarked.
Consultations 	Displays instances with consultations addressed to you.
History views 	Provides a history of active instances you have processed. The default history views are: <ul style="list-style-type: none"> • Today • Yesterday • <i>[Prior days of the current week]</i> • Last week • Two weeks ago • Three weeks ago

 **Note:** The default views do not display instances that have been completed or aborted.

Work List Panel

The **Work List** panel is where you will see the instances corresponding to the view you have selected in the **Views** panel.

From the **Work List** panel, you can:

- [Selecting Instances](#) on page 11 and perform operations on them or view detailed information in the **Instance Detail** panel
- [Searching for Instances](#) on page 11 that match certain conditions
- [Saving a View](#) on page 12 with sets of search conditions, for later use
- [Creating a Presentation](#) on page 12, where you define the columns you want to see in a view
- [Bookmarking Instances](#) on page 13 for later easy access

Columns

In the Work List panel you can choose the columns that are presented in a given view. You can define the columns you want to see, and save column arrangements. A particular column arrangement is known as *presentation*.






The following columns are available:

- Actions
- Activity
- Activity Deadline
- Copy
- Creation Time
- Deadline
- Description
- Has Attachments
- Has Notes
- Initiator
- Initiator Name
- Instance Number

- Parent Copy
- Participant
- Priority
- Process
- Process Deadline
- Received
- Status
- Task Participant


Special Columns





You can add or remove any column from your presentation except for the *Actions* column, which is always shown and is always the rightmost column. This column is identified by an ellipsis (...). You click on the ellipsis to edit the Presentation. The Actions column shows the actions you can perform on each instance. If your participant can do nothing with the instance, no action icons will appear. Otherwise, one or more of the following actions will be shown:

Icon	Action Name
	Execute
	Send
	Send To
	Grab
	Grab (<i>with drop-down list</i>)
 (or custom icon)	<i>Process-specific (see below)</i>


You perform an action by clicking on the icon.






Process-specific actions are those that have been defined by the designer of the process. The process you are running may or may not have process-specific actions. If present, they may be represented by a custom icon specific to your installation. The Grab with drop-down list action appears when more than one Grab is available.

The *Priority* column is indicated by a flag icon () and priority level is shown by its color. If there is no flag, priority is normal. Priority status can be one of the following:

Flag	Priority
	Highest
	High
<i>none</i>	Normal
	Low
	Lowest

The *Status* column shows an icon with the current status of the instance. Possible status values are:

Icon	Status
<i>none</i>	Running
	Exception

Icon	Status
	Suspended
	Grabbed
	Completed
	Aborted
	Activity Completed

An instance is considered to be *in process* when its status is neither Completed nor Aborted.

Selecting Instances

There are two modes of instance selection. You can select instances by clicking anywhere on the instance row, or you can select instances by setting the checkbox. Each mode of selection has a different use.

Single Instance Selection (Highlight)

When you select an instance by clicking on the row, the instance will be highlighted and the instance will be shown in the **Instance Details** panel. You can only select one instance at a time with this method, since only one instance can appear at a time in the Instance Details panel.

This documentation refers to this as a *highlight* selection.

Multiple Instance Selection (Checkbox)

When you select an instance by marking the checkbox, the **Operations** menu is enabled. You can select many instances with this method, and any operation you perform will be done on all of them. Instances selected via checkbox do not appear in the **Instance Details** panel, which will always show the instance currently highlighted regardless of its checked state.


This documentation refers to this as a *checkbox* selection.

Searching for Instances

If there are no views configured to retrieve the range of instances you want, you can perform a search based on conditions you specify.

Instance searches can be based on process, assigned roles, status, and whether the instances meet certain conditional criteria.

To search for instances:

1. In the **Work List** window, click on the **Search** icon .

The Search pane of the **Work List** panel will open in the top of the panel.
2. In the Search pane, in the **Processes** section, set the checkboxes for each of the processes you want to include in the search.
3. To search for instances based on their role assignment, in the **Show Instances** section, configure the **Assigned to:** drop-down list.

To include aborted or completed work items in the search, you must select All for this option.
4. To search for instances based on their status, in the **Include Work Items** section, select checkboxes for each of the statuses you want to include.
5. You can add conditions to the search as needed. For each condition you want to add:
 - a) set the **Condition** drop-down list to the condition you want to check for.

- b) use the **Add** button to add it to the search.
 - c) Set the condition fields as needed.
 - d) To remove a condition, click on the Remove icon (✖) for that condition.
6. Click **Search**.
The search results are displayed in the **Search** dialog box.
7. Before closing the **Search** dialog box, you can [Saving a View](#) on page 12, if desired.

Saving a View

You can create custom views that specify which instances are displayed and how they are displayed. When you create a custom view, you can access it from the Views panel.

Instances can be displayed based on their process, assigned roles, and whether they meet certain conditional criteria. You can also choose how the instances in a view are displayed and sorted by [Creating a Presentation](#) on page 12.

To create and save a view:

1. In the **Views** panel, select a view.
The view will display in the **Work List** panel.
2. In the View toolbar, click the **Search** icon (🔍).
The search pane will appear in the top of the **Work List** panel.
3. In the **Processes** section, select the checkbox for each of the processes you want to include in the view.
4. To filter instances based on their role assignment, in the **Show Instances** section, choose the condition you desire from the **Assigned to** drop-down list.
To include aborted or completed instances in the view, you must select **All** for this option
5. To filter instances based on their status, in the **Conditions** section, select the **Case sensitive** checkbox so that WorkSpace matches the case of the conditions, and the **Match all conditions** checkbox if you want all conditions to be met, rather than just one or some of them.
6. Use the **Add** button to add conditions to the search as needed. To remove a condition, click on the Remove icon (✖) for that condition.
7. When you have set all the search parameters, click **Search**.
The instances that match your search criteria are shown in the **Work List**.
8. If you are satisfied with the results of the search, click **Save As** to save the search as a view for future use.
The **Save View As** dialog box will appear.
9. Fill in the **Description** text box. Optionally, specify a parent view (so your new view hangs from the parent view in the **Views** panel). Click **Save**.

Your view will have been saved with the search conditions specified. It will appear in the **Views** panel.

You may need to manually refresh the **Views** panel to see the new view.

Creating a Presentation

A *presentation* defines a column arrangement to be used when viewing instances in the **Work List** panel. When looking at a view, you can use an existing presentation or create a new one to be associated with that view.

To create a presentation:

1. You should have a view in the **Work List** panel. If not, select a view from the **Views** panel.
2. In the **Work List** panel, click on the ellipsis (...), which is the rightmost column heading.
The **Presentation** dialog box will display, set in the **Columns** tab.
3. Click on the **New Presentation** icon (📄), and write the name of the presentation you will create in the **Presentation Id** text box.

- Under the **Columns** tab, you will see two list boxes, the **Available Columns** list box and the **Presentation Columns** list box. Select the columns you want to display from the first list and transfer them to the second by clicking on the right arrow (➡). Remove unwanted columns from the presentation by selecting them and clicking on the left arrow (⬅).

The set of columns you've chosen will appear in the **Presentation Columns** list box.

- To set the position of a column, select it on the Presentation Columns list box, and use the up (⬆) and down (⬇) arrows to move the column to the position desired.
- Optionally, you may set format and sorting options from the **Format** and **Sorting** tabs.
- Once you have set your presentation, click **Save**.

A new presentation will be saved under the name you have chosen. This presentation will be associated to the current view.

Bookmarking Instances

To help you easily access specific instances, you can bookmark instances and recall them from the Bookmarks view (a default view).

To bookmark an instance:

- In the **Work List** panel, select the checkbox for the instance(s) you want to bookmark.
- From the **Operations** menu, select **Bookmark**.

The instance(s) will be bookmarked and will be visible in the Bookmarks view, so long as the instances are still active.



Note: The Bookmarks view only displays active bookmarked instances. Completed or aborted instances will no longer appear in the Bookmarks view.

Instance Detail Panel

The Instance Detail panel provides detailed information about an instance that you have selected in the Work List panel. It also contains a panel with tabs that allow you to perform different operations over the selected instance.

The **Instance Detail** provides information about the selected instance and about the activity task in the process where the instance is sitting.

Instance Information

The following table describes the information about the selected instance that you can view in the Instance Detail panel:

Field	Description
Instance	Shows the description of the selected instance.
Priority	Indicates the priority of the selected instance. Possible values are: <ul style="list-style-type: none"> lowest low normal high highest
Process	Shows the description of the process to which the selected instance belongs to.

Field	Description
Status	<p>Indicates the status of the selected instance.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • None • Running • Exception • Instance suspended • Grabbed • Completed • Aborted • Activity completed
Participant	Specifies the participant who is currently assigned to this instance. If the instance is not assigned the value of this field is Unassigned.
Received	Specifies the date when the selected instance arrived to the current activity.

Activity Information

The following table describes the information about the activity in the process where the selected instance is currently located:

Field	Description
Activity	Shows the description of the activity in the process where the selected instance is currently located.
Status	<p>Specifies the status of the main task of this activity.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Pending • Failed • Completed • Selected • Running • Activity completed • Instance routed • Already completed
Mandatory	Specifies if you must run the main task of this activity before sending the instance to the next activity in the process.
Repeatable	Specifies if you can run the main task of this activity multiple times.
Last Run	Specifies the date when the main task of this activity was run. This field is relevant only if the main task is repeatable.





Note: If the activity does not have a main task defined, the properties status, mandatory and repeatable do not appear.

Executing Tasks

Instances are processed by completing tasks. Some tasks are mandatory while others are optional. You can execute both optional and mandatory tasks from the **Instance Details** panel.

To execute a task on an instance in the **Instance Details** panel:

1. If you want to execute the main task, click on the **Execute** button () on the right side of the **Instance Detail** panel, and proceed to step 3.
2. If you want to execute an optional task, click on the **Optional Tasks** tab and click on the **Execute** button () corresponding to the task you want to run.
3. Input the data or perform the steps required by the task. Some tasks, particularly optional tasks, may simply give you information and require no input on your part.

The task will be complete. If it was an optional task, it may still be available to execute (some optional tasks can be executed more than once). If it was a required task, the system may send the instance to the next task, removing it from your Work List. If all required tasks are complete, and ALBPM did not send the instance, then you have to [Sending Instances to the Next Activity](#) on page 19 manually.



Adding Notes

Participants can add text notes to an instance. Participants who work with the item later in the process can read the notes and add notes of their own if necessary.



Caution: Once a note is added to an instance it remains for the life of the instance and cannot be removed or modified. You should verify the contents of any note you enter.

To add a note:

1. In the **Instance Detail** panel, select the **Notes** tab ().
A table is displayed with the notes that have been added to the instance.
2. Click on the **Add Note** button ().
The **Note** dialog box appears.
3. Write or paste your note in the text box and click **OK** to add it.
The note added to the notes table.



Note: Notes are sometimes added automatically to an instance as it advances through the process. These notes, which appear the same as notes added by participants, often indicate the status of certain tasks and activities.




Tip: Notes are lost after the instance has ended, when it is discarded a few days or weeks later, depending on how your installation is configured. If there are any notes you wish to have easy access to after the instance is no longer available, you should copy the note to a text file on your system.

Viewing Notes

Participants can add notes to an instance to maintain additional information about it for later reference.

You can determine if an instance shown in the **Instance Detail** panel has notes by looking at the number between parenthesis displayed in the **Notes** tab. This shows the number of notes that have been added to the instance. If the number is 0 (zero), then the instance has no notes.

You can also determine if an instance has notes directly in the Work List panel, so long as the *Has notes* column is visible. If the instance has notes, the Notes icon () appears in the column.



To view notes that have been added an instance:

1. In the **Instance Detail** panel, Select the **Notes** tab.
A table is displayed with the notes that have been added to the instance.
2. If the note is short, the entire note is displayed in the **Note** column. If the note does not fit in the **Note** column, click on the ellipsis (...) to display the whole note.

Adding Attachments

You can attach files to an instance in order to provide additional information or documentation about it. Participants with proper permission can view, edit, and update the attached files.

To attach a file to an instance:

1. In the **Instance Detail** panel, select the **Attachment** tab ().
A table is displayed with the attachments that have been added to the instance.
2. Click on the **Attach file** button ().
The **Attach file** dialog box will appear.
3. Specify a file in the **Select file** text box, or by clicking on the **Browse...** button, which will open a file selection dialog box.
4. Write a short description of the file in the **Description** text box. You may also add text to the **Remarks** text box.
The description is required, while the remarks are optional.
5. Click on the **Attach file** button.

The file you specified in step 3 will be attached to the instance. If you do not see the file listed in the Attachments table, you may need to refresh the **Instance Detail** panel.



Tip: Attached files are lost after the instance has ended, when it is discarded a few days or weeks later, depending on how your installation is configured. If there are any files you wish to have easy access to after the instance is no longer available, you should keep a copy of them on your system.

Opening Attachments

Explains how to open an attachment

You can determine if an instance shown in the **Instance Detail** panel has files attached to it by looking at the number between parentheses displayed in the **Attachments** tab. This shows the number of files that have been attached to the instance. If the number is 0 (zero), then no files are attached.



To view an attachment:


1. In the **Instance Detail** panel, select the **Attachments** tab.
A table is displayed with the files that have been attached to the instance.
2. Click on the file name.
The **Attachment Detail** dialog box will appear, showing information about the file.
3. If you want to download the file, click on the **Download** button, otherwise click on the **OK** button.
If you clicked on the **Download** button, your browser will present download options, such as whether to open the file directly or save it to a folder.
4. Choose your download option and proceed with the download.
The attached file is downloaded.

Sending Consultations

When processing an instance, you may need to ask other participants about the work item. To ask a question about the work item, you can send a consultation.

To send a consultation:

1. In the **Instance Detail** panel, select the **Notes** tab ().
A table is displayed with the last consultation that you have received about the instance.
2. Click on the **New Consultation** button ().
The **Consult** dialog box appears.




3. To specify the destination for the consultation, type a name in the **Participant** text box, or click the participant icon () next to the box and select a name from the list. If the list is long and has many pages, you can make it shorter by typing in a few characters of the participant's name and clicking on the participant icon.
4. Type the message for the consultation in the **Note** text box.
5. Click **OK**.

Your consultation will be added to the instance, which will become visible in the Consultations view of the user you are consulting. The consultation itself appears under the **Consultations** tab when that user highlights the instance that contains it.

WorkSpace also adds every consultation as a note. As with any other note, consultation notes are visible to all users who can see the instance.

Viewing Consultations

You can view instances with consultations sent to you using the Consultations view. Then, you can select an instance with a consultation and read it in the **Instance Detail** panel


1. To display a list of work items with consultations, select the Consultations view () in the **Views** panel. The **Work List** panel will show the Consultations view. This view shows only those instances with consultations.
2. To view a consultation for an instance, select (highlight) the instance from the list. The instance will appear in the **Instance Details** panel.
3. In the **Instance Details** panel, to view the most recent consultation, select the **Consultations** tab (). To view all previous consultations, select the **Notes** tab ()

You can read the consultation. You can send a consultation to reply. See [Sending Consultations](#) on page 16.



Viewing an Audit Trail

Audit trails display the activity history of an instance, so you can determine how it reached its current status.

To view the audit trail of an instance:

1. Select an instance from the **Work List** panel. The instance will appear in the **Instance Details** panel.
2. In the **Instance Details** panel, to view the audit trail, select the **Audit Trail** tab ()

You will see a table with each activity, the events recorded for it (for example, *Completed* or *Instance created*), the user and date for the event, and the copy number of the instance.

To view all the events for a given activity, you must expand the activity by clicking on the expand button () . To see only the last event of the activity, click on the collapse button () .

Querying and Viewing Audit Records in WorkSpace

You can query and view audit records for processes in which you are an authorized participant. To do this, use WorkSpace and follow these steps:

1. Select a process instance from your inbox. The Instance Detail panel displays information about the selected instance.
2. In the Instance Details panel, select the Audit Trail tab. A table lists each activity, the events recorded for it, the person responsible, the timestamp, and the copy number.





Note: To view all events of an activity in greater detail, expand the activity.

Viewing the Business Process

You can view an image of the business process the instance belongs to. The image shows the process and displays a flag on the current activity of the instance.

To view a business process:

1. Select (highlight) an instance from the **Work List** panel.
The instance will appear in the **Instance Details** panel.
2. In the **Instance Detail** panel, Select the **Process Image** icon (.

WorkSpace displays a window with an image of the process. A flag () will show the current location of the instance in the process.



Note: If the process is large, your browser may reduce the size of the image so it will fit the window, making hard to read the text. In this case, use the appropriate tool in your browser to expand the image to its regular size. You may need to scroll horizontally or vertically with the larger process image.

Handling Instances

Depending on the design of the process, there are a number of actions you can take when working with an instance. Usually you can execute a task on the instance, or you can perform an *operation* on the instance.

Executing tasks

Tasks may be optional or required. Optional tasks can be executed from the **Instance Detail** panel, while mandatory tasks can be executed from both the **Instance Detail** panel and the **Work List** panel.

Performing Operations

Operations are performed from the **Work List** panel, and are available in the **Operations** menu. This menu is only enabled when instances are selected (checkbox) in the **Work List**, and the options in the panel also vary as a function of the operations available in the process.

Viewing Instances

You can view a list of instances by selecting a view. Views, which are listed in the **Views** panel, display collections of instances that meet the search conditions defined in the view.

A number of [Default Views](#) on page 8 are available. In addition to these, custom views can be created, edited, and deleted.

To view a list of work items:

1. In the **Views** pane, select a view. It may be necessary to expand a parent view if it contains a child view that you want to display.

In the **Work List** panel, a list of instances is displayed in a table with columns that are based on the presentation for the current view. If no instances appear, then no instances match the conditions of the view.

Sending Instances to the Next Activity

Some instances require that you send them to the next activity after performing a task, while others are sent automatically. This depends on the design of the process. You can use the **Send** or **Send To** operation to send an instance to the next activity.

If an instance is at an activity form which there is only one path to continue in the process, ALBPM will send it automatically to the next activity when you complete the execution of the mandatory tasks of the current activity. But there may be more than one path following the current activity. In this case, the user must specify the next activity or user with **Send To** (described below). Other work items might give you the option of sending them to the next activity while waiting on another task that cannot yet be performed.

To send a work item to the next activity:

1. In the **Work List** panel, select (checkbox) the instances you want to send.
The **Operations** menu becomes enabled.
2. From the **Operations** menu, select **Send** or, if you need to specify the next activity or participant, select **Send To**.
If you selected **Send To**, the **Send To** dialog box will appear. See [Sending Instances to Participants](#) on page 20 for more information about this option.

The selected instance(s) are sent.

Sending Instances to Participants

You can send a work item to the next activity and assign it to a specific participant.

To send a work item to a participant:

1. To display a list of work items, in the left pane, click a view name.
2. In the right pane, click the checkbox for the work item you want to send.
3. In the Work Item toolbar, click the **Send To Work Item** button.
4. In the **Send To** dialog box, select the participant for the next activity and click **Send**. For some processes, you might have to specify the activity you are sending to.

The instance is sent. Other users will not be able to work on the sent work item until the selected participant has performed an action on it.

Sending Instances Back

If an exception occurs for a work item, you can send it back to the activity where it occurred, and continue processing it from that point.

To send an instance back to the previous activity:

1. In the **Work List**, select (checkbox) the instance you want to send back.
The **Operations** menu becomes enabled.
2. From the **Work List Operations** menu, select **Back**.



Note: The **Back** menu option is only available if an exception handler was included in the process design, and an exception occurred for the instance selected.

Reference

Editing a Business Rule

Business rules can be edited in WorkSpace if the project design includes one or more Business Rule Editor activities.

Like any other activity, a business rule editor activity is assigned to a given role. If any of the roles you are in has been assigned such an activity, you will be able to edit business rules.

To edit a business rule:

1. In the **Applications** panel, click on the application which edits the Business Rule. This application will have a name assigned to it by the project designer.
The business rule editor window will appear.
2. If more than one rule is available, select the rule you will edit from the drop-down list.
The Business Rules editor appears for the rule you have selected.
3. If you are in simple editor mode, you can [Adding Conditions](#) on page 21, [Editing Conditions](#) on page 21, or [Removing Conditions](#) on page 22 conditions in the business rule, or you can switch to the advanced editor by clicking on **Switch to Advanced Editor**.
4. Save your changes and close the business rule Editor when you are done.

To add, edit, or remove conditions, see topics below.

Adding Conditions

To add a condition:

1. To add a condition, select one of the available project variables or business parameters from the **Add Condition** drop-down list.
2. Click the **Add Simple Expression** button.
A new condition line is added.
3. Select a comparison operator from the drop-down list next to the variable or parameter name.
Different operators are available as a function of the data type of the variable or parameter you are comparing. Operators include *Equals*, *Not Equals*, *Greater Than*, *Less Than*, and so on.
4. Enter the value that will be compared to in the field on the right. Special options may be available depending on the data type of the value being compared. For example, a time value field will be accompanied by a calendar tool to help you pick a date.
5. Repeat steps 1 through 4 to add more conditions.
6. When you are done, save your changes by clicking **Save**.

Editing Conditions

To edit a condition:

1. To change the comparison operator, select another one from the drop-down list next to the variable or parameter name.

Different operators are available as a function of the data type of the variable or parameter you are comparing. If you are looking for a comparison operator which is not in the list, it is not valid for the variable or parameter the condition will test.

2. To change the value that will be compared to, edit the field on the right.
3. When you are done, save your changes by clicking **Save**.

Removing Conditions

To remove a condition:

1. If you wish to remove a condition, click the **Remove** icon (✖) on the condition line.
2. When you are done, save your changes by clicking **Save**.

Advanced Editor Mode

Use the advanced editor mode to write complex business rules. This mode requires PBL coding, so use only if you are familiar with PBL syntax.



Note: If you write a complex business rule in the advanced editor mode, you will no longer be able to edit this rule in the simple editor mode.

To use the advanced editor:

1. In the simple editor, click **Switch to Advanced Editor**.
The advanced editor opens. This is a PBL code editor. If you have already defined any conditions, these will be shown in code form.
2. In the editor, enter any PBL code you require to implement the business rule. You must exit your code with a return statement which returns a boolean value (`true` or `false`).
For more information about PBL, consult the PBL Reference.
3. Save and close when you are done.