

Oracle® Business Process Management

BPM Add-In for MS-Office

10g Release 3 (10.3.1)

January 2009

Copyright © 2006, 2008, 2009 Oracle. All rights reserved.

The Programs (which include both the software and documentation) contain proprietary information; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent, and other intellectual and industrial property laws. Reverse engineering, disassembly, or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. This document is not warranted to be error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose.

If the Programs are delivered to the United States Government or anyone licensing or using the Programs on behalf of the United States Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth in FAR 52.227-19, Commercial Computer Software--Restricted Rights (June 1987). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and we disclaim liability for any damages caused by such use of the Programs.

Oracle, JD Edwards, PeopleSoft, and Siebel are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

Contents

Using the Oracle BPM Add-in.....	4
Submitting a Document to a Business Process.....	4
Configuring the Oracle BPM Add-in.....	4
Basic Business Process Concepts.....	5
Business Process Overview.....	5
Work Item Overview.....	6
Configuration Information.....	7
Installing the Oracle BPM Add-in for Office 2007.....	7
Enabling the Oracle BPM Add-in.....	7

Using the Oracle BPM Add-in

The Oracle BPM Add-in for Microsoft Office 2007 allows you to create Work Items in a Business Process directly from a Microsoft Office application.

If you are unfamiliar with Business Processes and Work Items, you should read the topics under Basic Business Process Concepts.

You can create new Work Items from the following Microsoft Office 2007 applications:

- Excel
- PowerPoint
- Word

Since the BPM Add-in leverages the Microsoft Office 2007 ribbon, it cannot be used with previous versions.

If you don't know if the Oracle BPM Add-in is installed in your system, open one of the applications listed above, and look for the *Business Processes* tab in the ribbon. If it is not present, the BPM Add-in is not installed or not enabled.

Submitting a Document to a Business Process


With the Oracle BPM Add-in, you can submit a document directly to a business process. When you do so, you create a new Work Item that has the document attached to it.

The following steps assume you have installed and configured the Oracle BPM Add-in for Microsoft Office 2007.

To submit a Microsoft Office document to a Business Process:

1. From the Microsoft Office application, with the document open, select the **Business Processes** tab and click **Submit to Business Process**.
If you did not select the **Always use this process option**, the **Select Process** dialog box appears. Otherwise, the **Attachment Information** dialog box appears, and you can proceed to step 3.
2. Select the business process you want to submit the document to, and click **Next**.
The **Attachment Information** dialog box appears.
3. In the appropriate text fields, you can enter a description and remarks about the document. Both of these are optional.
4. Click **Accept**.

 **Note:** If this is a new, unsaved document, the Oracle BPM Add-in will open the **Save As** dialog box so that you can save it. You cannot submit a document that has not been saved.

 **Note:** If it is an existing document that has unsaved changes, the Add-in will save it before creating the new instance.

If the work item was created, the **Confirmation** dialog box appears.

Configuring the Oracle BPM Add-in


To be able to start a new Work Item with a document submission, you must specify your user name and the server you will submit the document to.

The steps below assume the Oracle BPM Add-in is installed.

You can configure the Oracle BPM Add-in from any of the supported Microsoft Office 2007 applications (Word, Excel, or PowerPoint).

To configure the Oracle BPM Add-in:

1. In the Microsoft Office Ribbon, select the **Business Processes** tab.
2. Click **Change Settings**.
The **Settings** dialog box appears.
3. If your server is on the local network, select it from the **Server Name** drop-down list.

 **Note:** The Oracle BPM Add-in will search for servers in the local network. If you don't see the server you want, you can click on **Refresh List** so that the Oracle BPM Add-in will search again. If you still don't see it, or if you don't see any servers at all, either there is no server on your local network, or your machine is somehow blocked. For example, you may have a firewall configured. Contact your network administrator for further assistance.
4. If your server is not on the local network, select *Enter URL Manually* from the **Server Name** drop-down list, and enter a complete URL address, which should be provided by your Oracle BPM Administrator.
5. Enter your user name and password in the **Authentication** section.
6. Click **Test Connection** to verify that your settings are correct.
The result of the test will be displayed in the status section.
7. If the test in the previous step was successful, click **Next**.
The **Select Process** dialog box appears. One or more processes should be listed.
8. Select a process from the list. If you will always use this process, select the **Always use this process** option. If you don't set this option here, you can set it later when you create a Work Item.
9. Click **Next**.

Basic Business Process Concepts

To obtain a basic understanding of business processes, read the topics in this section.

Business Process Overview

A business process is a sequence of business tasks and activities that, when executed, produces a well-defined outcome. Once this outcome is achieved, the process is complete.

A simple business process can involve hiring an employee, processing a sales order, or reimbursing a business expense. A more complex business process can involve many people and activities across an organization.

Sometimes the main goal of a process cannot be achieved. For example, if a product is out of stock, a shipping clerk may need to cancel a sales order. For this reason, a business process must provide for outcomes other than the principal goal. For example, if the product is out of stock it may be possible to offer the client an alternative that the client can then accept or reject. Thus, a process can have a range of possible outcomes.

Activities

Business processes include logical steps, called *activities*, each of which can involve performing one or more *tasks*.

There are two types of activities: automatic and interactive. *Automatic activities* are executed automatically by the Process Execution Engine, whereas *interactive activities* require human input.

The activities of a business process are linked by *transitions*, which determine the order in which they are performed and the basic workflow of the process.

Roles and Participants

Each interactive activity belongs to a *role*, that is, a title or job function performed by participants in the organization. For example, a role could be *Supervisor* or *Finance Administrator*.

Participants are the individuals who interact with the process. To perform an activity, a participant must be assigned the role that the activity belongs to. A participant can have one or more roles.

Exceptions

Because it is often impossible to predict every outcome, a business process usually needs a way to deal with *exceptions*. An exception is an event in which a pre-defined outcome of a process cannot be reached.

The way in which a process deals with such an event, known as *exception handling*, can involve such steps as data clean-up or notifying a participant with a supervisory role that the situation needs attention.

Work Item Overview

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

For example, in a business process that handles purchases, each work item could be an individual purchase order. There can be any number of work items traversing a business process, just as there can be any number of purchase orders going through a purchase order system.

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

The life of each work item has a beginning and an end, as defined in the business process. As the work item proceeds through each step of the process, it is worked on by human participants or processed automatically by software.



Note: In order to understand what a *work item* is, you must first understand the concept of a [Business Process Overview](#) on page 5.



Note: Work Items are also called *instances*, a more technical term used by business process designers. A business process instance is the same thing as a work item.

Configuration Information

In general, the Oracle BPM Office Add-in will be configured by a system administrator or IT department. The information in this section is provided in case you will install the BPM Add-in yourself or need to troubleshoot an existing installation that isn't working.

Installing the Oracle BPM Add-in for Office 2007

The following procedure shows you how to install the BPM Add-in for Office 2007.

To install the Oracle BPM Add-in for Office 2007, you need the following:

- Office 2007 with one or more of the following applications:
 - Excel
 - PowerPoint
 - Word
- Microsoft .NET Framework 2.0, 3.0, or 3.5. Windows Vista includes the .NET Framework, but Windows XP does not. If you have Windows XP, check if a compatible version of the .NET Framework is present, and if not install one. The .NET Framework can be downloaded from the [Microsoft Download Center](#).

To install the Oracle BPM Add-in:

1. Locate the installation file, *OracleBPM-OfficeAddIn.msi*, in the following directory:
<ORABPM_HOME>/webapps/workspace/office
2. Double click on the *OracleBPM-OfficeAddIn.msi* file to run the installer, and follow the Installation Wizard instructions.
The Oracle BPM Add-in is installed.

You can verify that the Oracle BPM Add-in has been correctly installed by running Excel, Word, or Power Point and looking for the Business Processes tab. If the tab is present, the Add-in is installed and enabled. If not, the Add-in is either not correctly installed or disabled.

Enabling the Oracle BPM Add-in

If you installed Office 2007 before installing the Microsoft .NET Framework, the Oracle BPM Add-in may be disabled. This topic describes how to enable the Add-in.

The Microsoft .NET Framework, Office 2007, and the Oracle BPM Add-in should be installed in your machine.



Note: If you have just installed the Oracle BPM Add-in, the Add-in is not visible, and you are running Windows XP, the most likely reason the Add-in is disabled is that you are missing the Office 2007 Primary Interop Assemblies (PIA) component. This happens when you install the .NET Framework *after* installing Office 2007.

In this case, you must install the Primary Interop Assemblies (PIA) before proceeding with the steps below. You can download this component from the [Microsoft](#) Web site.

Follow this procedure if you have installed the Oracle BPM Add-in and do not see the **Business Processes** tab:

1. Click the **Office Button**, then the **Excel Options**, **Word Options**, or **PowerPoint Options** button, depending on the application you are using.
The **Options** dialog box will appear for your application.
2. In the left panel, click **Add-Ins**.
The **Add-ins** page will appear.
3. In the **Manage** drop-down list, make sure that *COM Add-ins* is selected, and click **Go**.
The **COM Add-ins** dialog box appears.
4. In the **Add-ins available list** you should see the item BPM Ribbon with an unselected checkbox. Select this checkbox and click **OK**.
The dialog box will close and the **Business Processes** tab should now appear in your application.