Oracle® Business Process Management
BPM Add-In for MS-Office
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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.
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 PowerPoint 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.