



BEA WebLogic Process Integrator

Worklist User Guide

BEA WebLogic Process Integrator Release 1.1
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BEA WebLogic Process Integrator Worklist Guide

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About This Document

This document explains how to use the WebLogic Process Integrator™ Worklist application. The document is organized as follows:

- Chapter 1, “Worklist User Interface,” provides instructions for starting and exiting the worklist and navigating the worklist user interface.
- Chapter 2, “Task Menu,” describes the functions of the Task pull-down menu commands.
- Chapter 3, “Workflow Menu,” describes the Workflow pull-down menu commands.
- Chapter 4, “Customization: View Menu,” explains how to customize the worklist by using the View pull-down menu commands.
- Chapter 5, “Tools Menu,” describes the functions of the Tools pull-down menu commands.

What You Need to Know

This document is intended for end users who are assigned and will be executing workflow tasks.

e-docs Web Site

BEA product documentation is available on the BEA corporate Web site. From the BEA Home page, click on Product Documentation or go directly to the “e-docs” Product Documentation page at <http://e-docs.beasys.com>.

How to Print the Document

You can print a copy of this document from a Web browser, one file at a time, by using the File—>Print option on your Web browser.

A PDF version of this document is available on the WebLogic Process Integrator documentation Home page on the e-docs Web site (and also on the documentation CD). You can open the PDF in Adobe Acrobat Reader and print the entire document (or a portion of it) in book format. To access the PDFs, open the WebLogic Process Integrator documentation Home page, click the PDF files button, and select the document you want to print.

If you do not have the Adobe Acrobat Reader, you can get it for free from the Adobe Web site at <http://www.adobe.com/>.

Related Information

The following BEA WebLogic Process Integrator documents contain information that is relevant to using this product.

- *BEA WebLogic Process Integrator Tutorial*
- *BEA WebLogic Process Integrator Studio Guide*
- *BEA WebLogic Process Integrator Installation and Configuration Guide*
- *BEA WebLogic Process Integrator Javadoc*
- *BEA WebLogic Process Integrator Release Notes*

Contact Us!

Your feedback on the BEA WebLogic Process Integrator documentation is important to us. Send us e-mail at **docsupport@beasys.com** if you have questions or comments. Your comments will be reviewed directly by the BEA professionals who create and update the WebLogic Process Integrator documentation.

In your e-mail message, please indicate which release of the BEA WebLogic Process Integrator documentation you are using.

If you have any questions about this version of BEA WebLogic Process Integrator worklist, or if you have problems installing and running the worklist, contact BEA Customer Support through BEA WebSupport at **www.beasys.com**. You can also contact Customer Support by using the contact information provided on the Customer Support Card, which is included in the product package.

When contacting Customer Support, be prepared to provide the following information:

- Your name, e-mail address, phone number, and fax number
- Your company name and company address
- Your machine type and authorization codes

- The name and version of the product you are using
- A description of the problem and the content of pertinent error messages

Documentation Conventions

The following documentation conventions are used throughout this document.

Convention	Item
Ctrl+Tab	Indicates that you must press two or more keys simultaneously.
<i>italics</i>	Indicates emphasis or book titles.
monospace text	Indicates code samples, commands and their options, data structures and their members, data types, directories, and file names and their extensions. Monospace text also indicates text that you must enter from the keyboard. <i>Examples:</i> #include <iostream.h> void main () the pointer psz chmod u+w * \tux\data\ap .doc tux.doc BITMAP float
<i>monospace italic text</i>	Identifies variables in code. <i>Example:</i> String expr
UPPERCASE TEXT	Indicates device names, environment variables, and logical operators. <i>Examples:</i> LPT1 SIGNON OR

Convention	Item
{ }	Indicates a set of choices in a syntax line. The braces themselves should never be typed.
[]	Indicates optional items in a syntax line. The brackets themselves should never be typed. <i>Example:</i> buildobjclient [-v] [-o name] [-f file-list]... [-l file-list]...
	Separates mutually exclusive choices in a syntax line. The symbol itself should never be typed.
...	Indicates one of the following in a command line: <ul style="list-style-type: none"> ■ That an argument can be repeated several times in a command line ■ That the statement omits additional optional arguments ■ That you can enter additional parameters, values, or other information The ellipsis itself should never be typed. <i>Example:</i> buildobjclient [-v] [-o name] [-f file-list]... [-l file-list]...
.	Indicates the omission of items from a code example or from a syntax line. The vertical ellipsis itself should never be typed.



1 Worklist User Interface

The following sections describe the worklist and explain how to use the WebLogic Process Integrator Worklist interface:

- Overview
- Starting the Worklist
- Viewing Workflow Status
- Using the Worklist Interface
- Exiting the Worklist

Overview

You use the WebLogic Process Integrator Worklist application to view, perform, and work with tasks that are currently assigned to you or to the roles to which you belong. Various workflow commands enable you to reassign tasks to other users, mark tasks as done, unmark tasks done, view a workflow status, manually start a workflow, and more.

The Worklist is the primary user interface for WebLogic Process Integrator. You can customize the interface to suit your needs.

Starting the Worklist

To start the Worklist application from your desktop, choose Start > Programs > WebLogic Process Integrator > Worklist to display the Logon dialog box.

Figure 1-1 Logon to WebLogic Process Integrator Dialog Box



Enter the following information in the Logon dialog box:

- User Name—User ID of the user who is connecting to the WebLogic Process Integrator Worklist application.
- Password—Password for the specified user.
- Server[:port]—Name or IP address of the WebLogic Process Integrator server to which you connect.

Viewing Workflow Status

After you log on to Worklist and if notification is turned on, a workflow status dialog box displays the total number of pending tasks (tasks waiting to be done) as well as the total number of overdue tasks, if any.

For information on the notification functionality, refer to “Options Command.”

Figure 1-2 Workflow Status



Using the Worklist Interface

The Worklist window may contain a series of tabs, depending on whether you are a member of a role. A role is a common area of responsibility, ability, or authorization level that is shared by a group of individuals. A single user can belong to one or more roles.

The first tab contains your WebLogic Process Integrator user ID and shows the tasks that have been assigned only to you. The remaining tabs contain the names of the roles to which you belong. Selecting a role tab displays the tasks associated with that role only. Only you can execute tasks displayed in your user ID tab. However, any user who belongs to a role can execute a task assigned to that role.

The information displayed in the Worklist window depends on the selected organization. An organization can represent different business entities, geographical locations, or any other distinction relevant to the particular business of the company. Use the drop-down list to the right of the window to select the organization for which you want to view task information; the Worklist window displays the user ID and role tabs corresponding to each organization to which you belong. Information is displayed only for those organizations to which a user belongs.

Note: If you belong to only one organization, the organization drop-down list is not displayed in the Worklist window.

Figure 1-3 Worklist User ID Tab

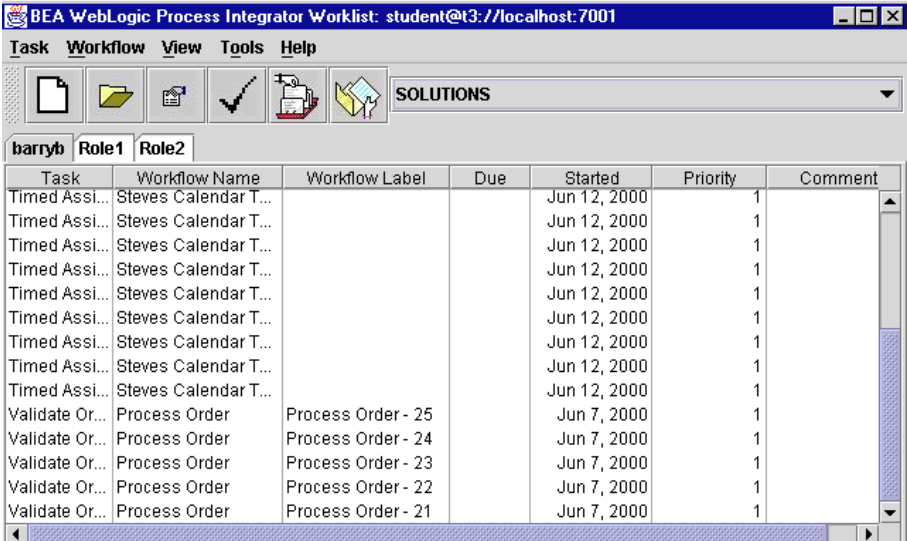
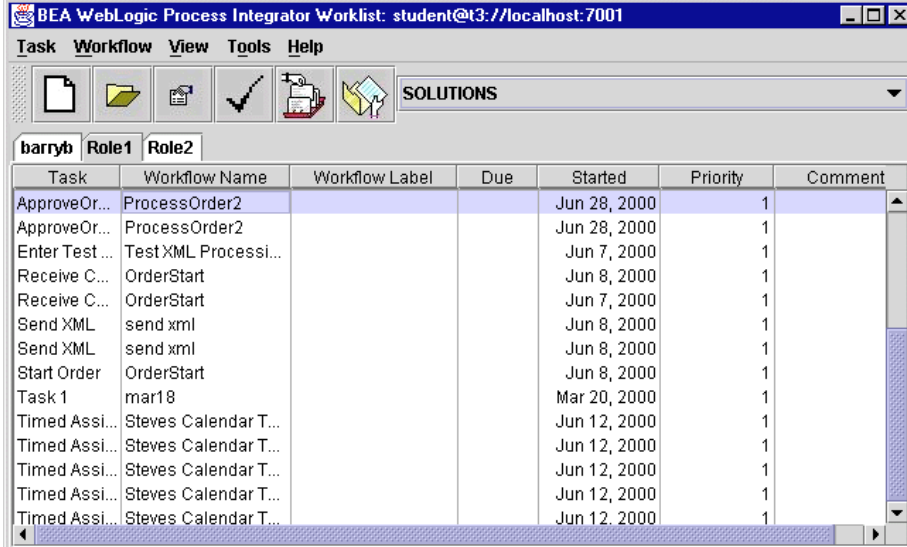


Figure 1-4 Worklist Role Tab



Worklist Task Columns

Each task in the Worklist window displays various properties, depending on how the worklist is tailored. These properties are displayed as columns in the worklist:

- Task—Name of the task within the workflow.
- Workflow Name—Name of the workflow template.
- Workflow Label—Workflow ID, defined in the Template Definition properties dialog box. This ID can be a built expression.
- Due—Date by which the task must be completed.
- Started—Date the task was activated.
- Priority—Task priority: low, medium, high.
- Comment—Comments about the task.

Worklist Toolbar

The following table describes the various Worklist toolbar commands. These commands correspond to menu commands; however, the menus contain many commands that are not shown on the toolbar.

Table 1-1 Worklist Toolbar Commands







Symbol	Purpose
	Start a new workflow.
	View the workflow associated with the selected task.

Table 1-1 Worklist Toolbar Commands

Symbol	Purpose
	View the properties for the selected task.
	Execute the selected task.
	Take ownership of the selected task.
	Reassign the selected task.

The worklist is a dynamic list. When new work is assigned to users, a task automatically appears in the list. As work is performed, the task status may change automatically. Tasks can be removed from the worklist either automatically or manually by the user, if they are reassigned or completed.

Exiting the Worklist

To exit the worklist, choose Task > Exit. Because the WebLogic Process Integrator server is responsible for maintaining the actual worklist contents, you do not need to save your work. When you exit the worklist, any customization you have done is saved.

2 Task Menu

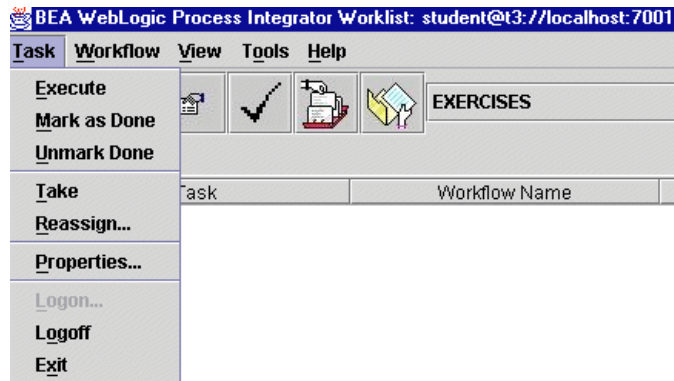
The following sections explain how to use the various WebLogic Process Integrator Worklist Task menu commands:

- Task Menu Overview
- Task Command Permissions
- Task Assignment
- Execute Command
- Mark as Done Command
- Unmark Done Command
- Take Command
- Reassign Command
- Properties Command
- Other Commands

Task Menu Overview

Use the Task pull-down menu commands to operate on the currently selected task in the worklist window. These commands are also available as a pop-up menu that you access by right-clicking on a selected task in the worklist.

Figure 2-1 Task Pull Down Menu



Task Command Permissions

When a task in a workflow is first defined in the WebLogic Process Integrator Studio application, certain permissions are set for that task in the Permissions tab of the Task Properties dialog box. These permissions determine which commands you can perform for a particular task in the Worklist Task menu. Refer to “Using Tasks” in Chapter 4, “Working with Workflow Components,” of the *WebLogic Process Integrator Studio User Guide* for more information about defining tasks in a workflow.

For example, if the Mark as Done and Reassign permissions are set for a task when it is first defined in the Task Properties dialog box, any user, user within a role, or user who belongs to a role to which the task is assigned can perform the Mark as Done and Reassign commands on the task. Therefore, the commands that can be performed for a particular task are dependent on the permissions set at task definition time, and all users and roles to which these tasks have been assigned can perform these commands.

Task Assignment

Tasks are assigned in the WebLogic Process Integrator Studio application. Task assignment occurs in three venues:

- **User**—A task is assigned to a particular user ID through the Assign Task to User action. Only the assigned user can perform the task unless this user reassigns the task to another user. (Reassignment can only occur if the Reassign command is valid, which is dependent on the permissions that are set at the time of task definition. Refer to “Using Tasks” in Chapter 4, “Working with Workflow Components” of the *WebLogic Process Integrator Studio User Guide*.) The first tab in the Worklist window is the User ID tab containing tasks assigned to your user ID.
- **Role**—A task is assigned to a role. A role is a common area of responsibility, ability, or authorization level that is shared by a group of individuals (such as “Buyer” or “Supervisor”). A single user can belong to one or more roles. If you belong to roles, each role will be represented by a tab to the right of the User ID tab in the Worklist window. Tasks contained within a role tab can be performed only by users who are members of that role. Any user who is a member of that role can take a task assigned to the role and execute the task.

To do a task assigned to a role, the user belonging to the role must first select the task in the Role tab and choose Take from the Task menu. This action moves the task to the user’s User ID tab, where the user can execute the task.

- User in a role—A task is assigned to a user in a role through the Assign to Role member option of the Assign Task to User action dialog box. The system automatically assigns the task to the user within the selected role who has the least number of tasks to perform. Refer to “Assign Task to User” in Chapter 5, “Actions,” of the *WebLogic Process Integrator Studio User Guide* for more information.

Execute Command

Use the Execute command to perform a task.

The Execute command is the most common operation in the worklist. It is equivalent to double-clicking a task in the list. The Execute command sends a message to the WebLogic Process Integrator server to perform the actions defined in the task’s executed event.

The actual behavior of the Execute command depends on the definition of the task as defined by the workflow designer at workflow definition time. It commonly results in an application or program being called. Sometimes, the result of the Execute command is the completion of the task, although this also depends on the definition of the task at workflow design time.

Tasks can usually be executed only if they are pending and have been assigned to a user or a role to which the user belongs.

Mark as Done Command

Use the Mark as Done command to change the status of a task to done.

This command sends a message to the WebLogic Process Integrator server to set the task completion date to the current date and then perform the actions defined for the marked done event of the task. Like the Execute command, the behavior of the Mark as Done command is determined by the definition of the task at workflow design time. Tasks can only be marked done if their properties allow it. Refer to “Properties Command” for more information.

Unmark Done Command

Use the Unmark Done command to reset task status from done to pending.

This command sends a message to the WebLogic Process Integrator server to clear the task completed date. It does not affect a task that is not complete. Tasks can only be unmarked done if their properties allow it. Refer to “Properties Command” for more information.

Take Command

Use the Take command to take a task assigned to a role to which you belong and place the task in your personal task list for execution.

When you execute the Take command, a message is sent to the WebLogic Process Integrator server to change the task assignment. The task is removed from the role worklist and placed in your personal (User ID tab) worklist. you can only take a task if its properties allow for task reassignment and if the task is not already done. Refer to “Properties Command” for more information.

Reassign Command

Use the Reassign command to reassign a task to another user, to a user in a role, or to a role. When you choose this command, the Reassign Task dialog box is displayed.

Figure 2-2 Reassign Task



You can reassign a task if the following are true:

- The task to be reassigned is currently assigned to you individually, to you as a user in a role, or to a role to which you belong.
- The task permissions allow the task to be reassigned, and the task properties assigned to the task include Reassign at Execution. Refer to “Properties Command” in this document and to “Using Tasks” in Chapter 4, “Working with Workflow Components,” in the *WebLogic Process Integrator Studio User Guide* for more information.

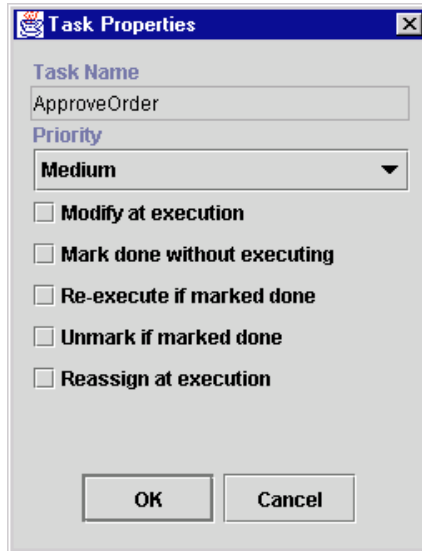
You can reassign a task as follows:

- To another user—In the Reassign Task dialog box, select User. In the Assignee drop-down list, select another user in the same organization associated with the workflow containing the task.
- To a user in a role—This reassignment option is available only if the Assign Task to User task action has been defined to include the Assign to Role member option. (See “Assign Task to User” in Chapter 5, “Using Actions,” in the *WebLogic Process Integrator Studio User Guide*.) In the Reassign Task dialog box, select User in a role. In the Assignee drop-down list, select a role. At execution time, the system performs workload balancing by automatically assigning the task to the user in that role who is assigned the least number of current tasks.
- To a role—In the Reassign Task list box, select Role. In the Assignee drop-down list, select any role that is in the organization associated with the workflow containing the task.

Properties Command

Use the Properties command to display and change properties of the selected task. Choose Properties to display the Task Properties dialog box.

Figure 2-3 Task Properties



A worklist user can only set task properties if the relevant permissions are set for the task in the Permissions tab of the Task Properties dialog box in the WebLogic Studio application. These permissions directly correspond to the commands that can be performed for a particular task from the worklist Task menu. For more information, refer to “Using Tasks” in Chapter 4, “Working with Workflow Components” of the *WebLogic Process Integrator Studio User Guide*.

The Task Properties dialog box contains the following:

- Task Name—Shown for informational purposes only and cannot be modified.
- Priority—Task priority: High, Medium, or Low.
- Task permissions—Determine what a user can do with a task from the worklist. Available permissions include:
 - Modify at execution—If selected, the task permissions can be changed. If not selected, none of the task permissions can be altered from the Properties command.

- Mark done without executing—If selected, the Mark As Done command can be performed on the task. The task's completed date can be set manually by the user.
- Re-execute if marked done—If selected, the Execute command can be performed on the task even if the task has already been completed.
- Unmark if marked done—If selected, the Unmark Done command can be performed on the task.
- Reassign at execution—If selected, the Take and Reassign commands can be performed on the task.

Other Commands

The Task menu also contains the following commands:

- Logon—Logs you on to the WebLogic Process Integrator server after you have previously executed the Logoff command.
- Logoff—Logs you off of the WebLogic Process Integrator server but leaves the worklist application running.
- Exit—Logs you off of the WebLogic Process Integrator server and shuts down the worklist application.

3 Workflow Menu

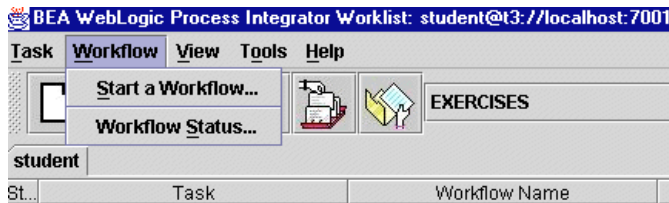
The following sections explain how to use the various WebLogic Process Integrator Worklist Workflow menu commands:

- Workflow Menu Overview
- Start a Workflow Command
- Workflow Status Command

Workflow Menu Overview

The Workflow pull-down menu contains a list of commands relating to current workflows for which a user is assigned tasks.

Figure 3-1 Workflow Pull-down Menu



Workflow menu commands can be performed by any user or member of a role to which a workflow task is assigned. No special permissions are required other than task assignment.

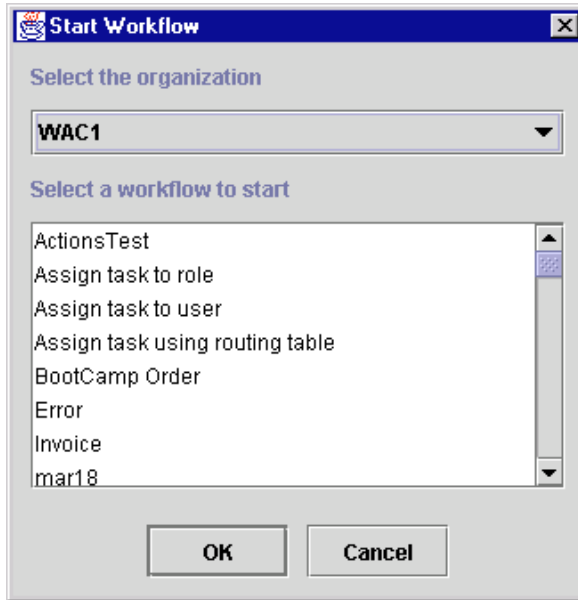
Start a Workflow Command

Use the Start a Workflow command to start a workflow manually. Any user that has a valid worklist account can manually start a workflow using this command.

Choose this command to display the Start Workflow dialog box, which shows all available workflow template definitions marked “Manually Startable.” Such workflows are marked “Active” and “Manual” start during workflow template definition. (For more information, refer to “Specifying Workflow Definition Properties” in Chapter 3, “Defining and Maintaining Workflows” and “Using Starts” in Chapter 4, “Working with Workflow Components” of the *WebLogic Process Integrator Studio User Guide*.)

The Start Workflow dialog box also displays the list of defined organizations to which you belong. You manually start a workflow for any organizations in this list.

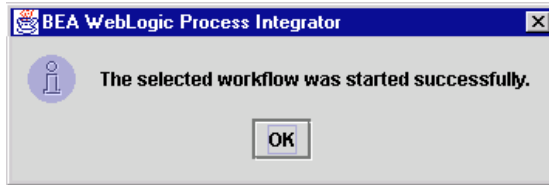
Figure 3-2 Start Workflow Dialog Box



Select the organization and a workflow to start. Click OK to start the workflow. A message is sent to the WebLogic Process Integrator server to start the workflow. The processing depends completely on the definition of the workflow.

You see the following message when the workflow starts successfully.

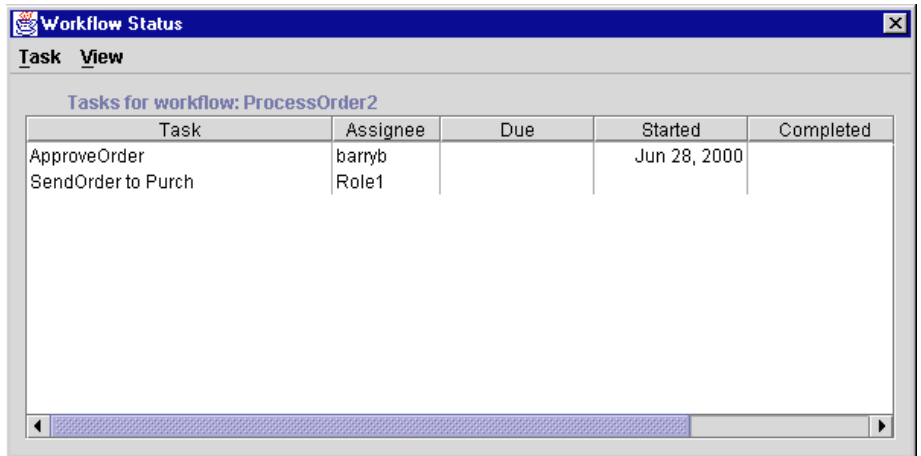
Figure 3-3 Workflow Successfully Started



Workflow Status Command

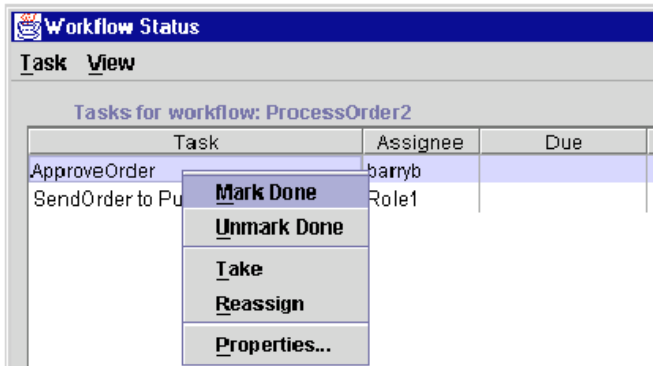
Use the Workflow Status command to display a list of all of the tasks associated with the workflow of the selected task.

Figure 3-4 Workflow Status Dialog Box



You can access task commands by right-clicking on a task in the Workflow Status dialog box. These commands are identical to those accessed through the Task menu. For more information, refer to Chapter 2, "Task Menu."

Figure 3-5 Task Commands



4 Customization: View Menu

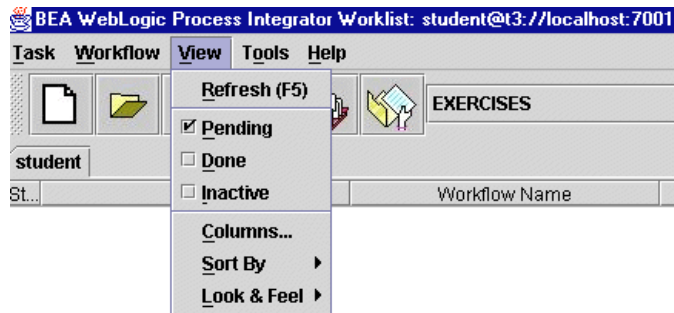
The following sections explain how to customize the WebLogic Process Integrator worklist by using the various View menu commands:

- View Menu Overview
- Refresh Command
- Pending Command
- Done Command
- Inactive Command
- Columns Command
- Sort By Command
- Look and Feel Command

View Menu Overview

Use the View menu commands to customize the display of the worklist and the behavior of the worklist application.

Figure 4-1 View Menu



Refresh Command

The Refresh command instructs the WebLogic Process Integrator server to update the status of tasks on the worklist.

Pending Command

The Pending command displays all pending tasks in the worklist. A pending task has not been executed yet.

Done Command

The Done command displays all tasks that have been completed.

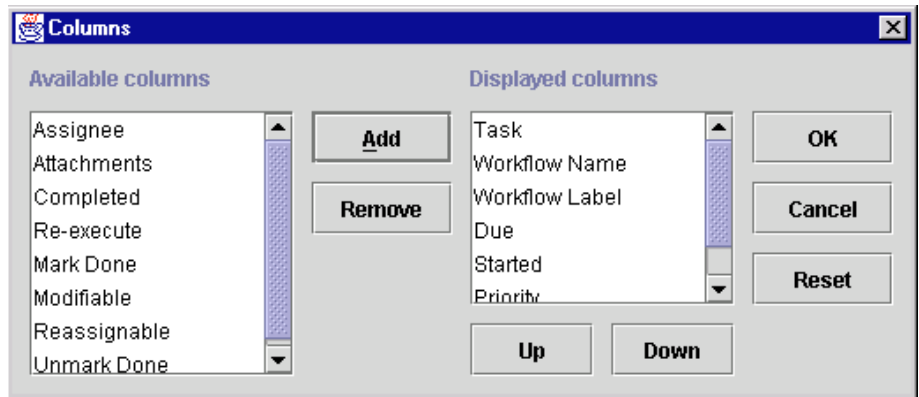
Inactive Command

The Inactive command displays all inactive tasks in the worklist. Inactive tasks are tasks that have not been started in the workflow.

Columns Command

The Columns command displays a dialog box in which you can customize the worklist display. The Columns dialog box contains a listing of all columns for a task.

Figure 4-2 Columns Dialog Box



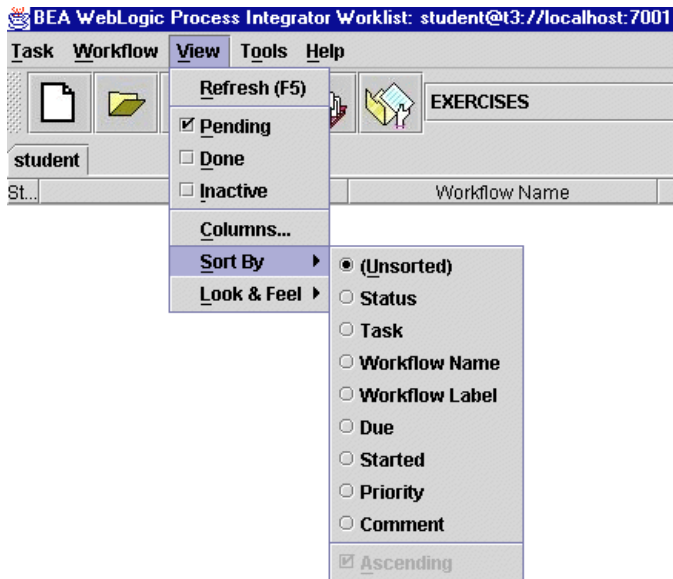
The dialog box shows columns currently displayed. Show columns or hide currently displayed columns by using the Add and Remove buttons. Alter column sequence by using the Up and Down buttons. The Reset button undoes any changes made.

After you make your column selections, the worklist display changes to reflect the new column layout.

Sort By Command

The Sort By command submenu lists all columns that can be shown for a task. Selecting a single column sorts the worklist tasks according to the value of the selected column.

Figure 4-3 Sort By Command Submenu



The Sort By submenu contains a series of radio button selections that represent the column headings in the worklist. Selecting a radio button sorts the worklist according to the values of that column. You can also sort tasks in the worklist by clicking the appropriate column heading on the Worklist window. Clicking a second time on a column heading changes the sort sequence, toggling between ascending and descending order.

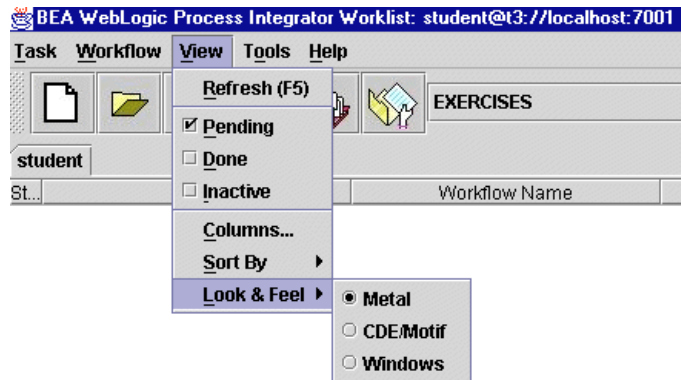
If you select the Ascending checkbox in the Sort By submenu, the tasks in the worklist are sorted in ascending order (by the selected column heading). If the Ascending checkbox is not selected, the tasks in the worklist are sorted in descending order.

Look and Feel Command

The Look and Feel command contains a submenu of display options. Depending on your preference, you can choose one of three common user environments for the worklist display:

- Metal
- Common Desktop Environment (CDE)/Motif
- Windows

Figure 4-4 Look and Feel Command Submenu



5 Tools Menu

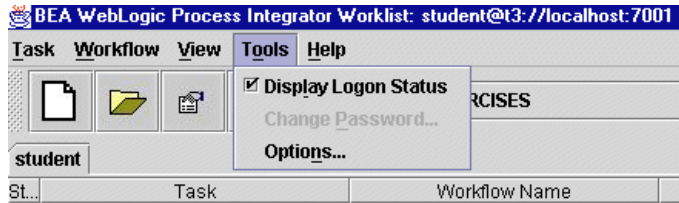
The following sections explain how to use the various WebLogic Process Integrator Worklist Tools menu commands:

- Tools Menu Overview
- Display Logon Status Command
- Change Password Command
- Options Command

Tools Menu Overview

The Tools pull-down menu contains a list of commands that you use to display your logon status, change your password, and view your worklist options.

Figure 5-1 Tools Menu



Display Logon Status Command

Use the Display Logon Status command to enable or disable the logon status window. When this option is selected and logon first occurs, the Workflow Status dialog box is displayed. This dialog box shows the total number of pending tasks (tasks waiting to be done) as well as the total number of overdue tasks, if any.

Note: Notification must be enabled in order to use this command. For instructions, refer to “Options Command.”

Figure 5-2 Workflow Status



Change Password Command

Use the Change Password command to change your worklist password. Note that this command only becomes available if you are running WebLogic Process Integrator using a manageable security realm. By default, the WebLogic Process Integrator security realm is non-manageable.

Figure 5-3 Change Password Dialog Box



Enter your current password in the Current Password field. Enter your new password twice in the New Password field and in the Confirm New Password field. Click OK to confirm the change.

Options Command

Use the Options command to set up the automatic notification mechanism for new task arrival and the refresh rate of the worklist.

The worklist is a dynamic list that is always changing to reflect the current state of the workflow system. Enabling notification allows the worklist to be configured to notify you when new tasks have been automatically added to your personal worklist.

Notification of new tasks can be enabled or disabled. If enabled, the maximum frequency with which notification messages are displayed can be set. For example, you might not want notification more than every five minutes, so as to not disturb your work.

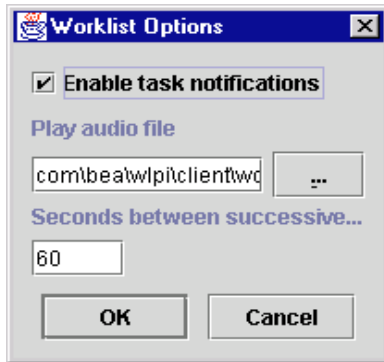
When notification is turned on and a new task is assigned to you, the following type of notification dialog box appears:

Figure 5-4 New Task Notification



Choose the Options command to display the Worklist Options dialog box.

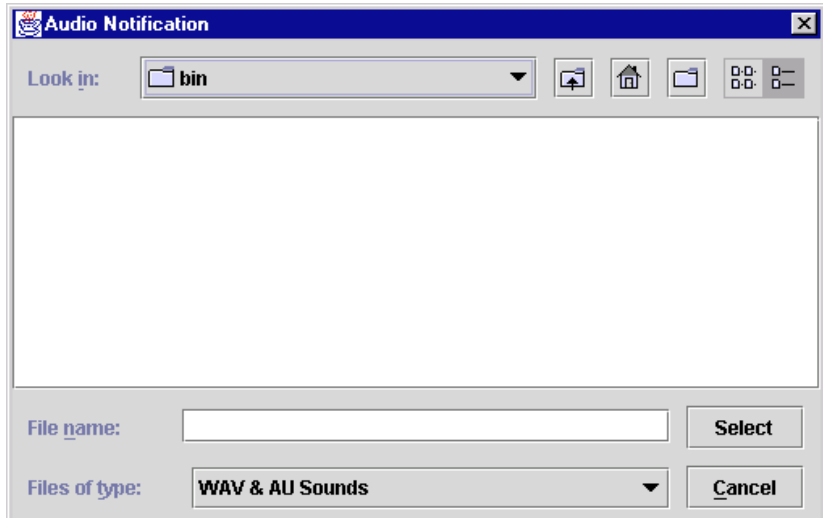
Figure 5-5 Worklist Options Dialog Box



The Worklist Options dialog box contains the following:

- Enable task notifications — If selected, task notifications will be sent.
- Play audio file — You can assign a WAV or AU audio file to the notification tool so that when you receive a notification, this audio file will play. Click the button to the right of this field to display the Audio Notification dialog box.

Figure 5-6 Audio Notification Dialog Box



- Seconds between successive notifications — Enter the interval time (in seconds) between notifications.

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