Using Process Express

Process Express is a web-based mechanism for routing forms from one person to another in order to complete a business process. A *process* is a series of *work items*, or tasks. These tasks are defined in a process map using Process Builder software. Each person who has a role to play in completing a process uses Process Express to organize, view, accept, search for, and delegate their individual work items. Some Process Express users can also initiate new processes.

In iPlanet Process Manager 6.0, each process is completed through the use of a Process Manager *application* built to specifically handle the process.

Process Express has three main sections:

- The Work Item List - This list contains all the work items assigned to a Process Express user. It shows information about each work item and is the place from which the user can view, accept, and delegate work items.
- The New Process Wizard - This is a set of pages that take users through the steps in initiating new processes.
- The Search Form - This form allows users to search for information on work items and processes.

This document provides instruction for those people who use Process Express to complete their work items and processes.

The document includes these sections:

- Understanding Work Items and Processes
- Accessing Process Express
- The Work Item List
- The New Process Wizard
- The Search Form
- Important Terminology

Understanding Work Items and Processes

A *work item* is a specific task in a series of tasks and a *process* is a series of work items. For example, in the sample Time Off Request application, there are four tasks (or work items):

- the employee initiating the request
- getting their manager's approval
- the employee providing additional information for clarification
- getting HR's approval.

The process is the whole set of these tasks from beginning to end.

The following steps explain what happens in a typical process:

1. A Process Express user initiates a process.
2. A work item appears in the Work Item List of the first person to play a role in the process. If the work item can be completed by any member of a group, it appears in each member's list.
3. If the work item is assigned to a group, one member of that group accepts the work item. When a group member accepts a work item, he or she claims the responsibility for completing that item and the item disappears from the Work Item Lists of all other members of the group.
4. The person or group member completes the required action for that work item.
5. The work item appears in the Work Item List of the next person or group to play a role in the process.
6. Steps 3, 4, and 5 are repeated until the last person or group in the process has completed the required action.
7. The process is complete.

Note. Once a work item is assigned to you or to a *group* that you are a member of, it appears in your Work Item List. If it is assigned to only you, the item remains in your list until you complete the required action for that item or delegate the item to someone else. If the item is assigned to a group that you are a member of, and another member of that group accepts or delegates the item, the item is removed from your Work Item List and becomes assigned to the person who accepted it or to the person it was delegated to.

Accessing Process Express

Process Express is the web-based application that Process Manager end users use to view, accept, search for, delegate, and create processes and work items.

Each Process Express user has a customized Process Express client and a user ID and password for accessing it. Users access Process Express through a web browser.

To access Process Express:

1. In the location bar of your browser, type

   `http://`*`server_name`*`/Express.npm/`

   A dialog box appears.

2. Enter your Process Manager user ID and password.

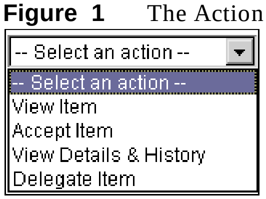
3. Click OK. Your Process Express client appears. Figure 2 shows a sample Process Express client.

Handling Work Items Assigned to You

Once a work item is assigned to you or to a group that you are a member of, it appears in your Work Item List. If it is assigned to only you, the item will remain in your list until you complete the required action for that item or until you delegate the item to another user. If the item is assigned to a group that you are a member of, and another member of that group accepts or delegates the item, the item is removed from your Work Item List and becomes assigned to the person who accepted it or to the person it was delegated to.

You will handle your work items from your Work Item List using the drop down list on the top right. Figure 1 shows the drop down list.

Figure 1 The Action Drop-down List



The items in the drop-down list are:

View Item. You may want to view a work item before you work on it. This feature may be particularly useful if a work item is assigned to a group that you are a member of. You can view the item in order to determine whether you will accept it. If a work item is assigned to a group, you cannot edit that work item's form until you have accepted the work item.

Accept Item. By accepting a work item, you are, in essence, claiming responsibility for completing it. Once you accept a work item, you can edit it. Work items that are only assigned to one person do not need to be accepted. They are automatically accepted by that person and the form for the work item is always editable.

View Details and History. You may want to view the history and details of a work item to better understand the process that the work item is part of. The history and details include information about who initiated the process, when it was initiated, and what other work items have been completed as a part of the process.

Delegate Item. You can only delegate a work item if the application was designed to permit you to do so. You delegate a work item when you want to assign it to someone else. When you do so, the work item disappears from your work list and appears on the other person's work list. To see if you are able to delegate a work item, view the item. A Delegate button will appear in the action bar on the work item's form.

The Work Item List

The Work Item List contains information about all work items assigned to you. You can access your Work Item List by clicking the Work Item List tab in Process Express. From this list, you can:

- Viewing a Work Item
- Accepting a Work Item
- Viewing the Details and History of a Work Item
- Delegating a Work Item(only if you have permission to do so)
- Specifying How Many Work Items Appear in the Work List

Figure 2 shows the Process Express client and Work Item List for a user named `admin`. Note that because this is the work item list for the Process Manager administrator, it includes an entry for a subprocess that would typically not appear on any other user's work item list.

Process Manager supports parallel processing and subprocesses.

Parallel processing allows the process to have multiple simultaneous work items. For example, in the Office Setup application, ordering a phone and getting a computer for the new employee can occur simultaneously. Thus, the work list in Figure 2 has two separate work items for process ID 492: Install network connection and order computer.

A subprocess is a work item that invokes a completely separate process instance that might have several work items of its own. The work item in the parent process does not get completed until all the tasks in the subprocess have finished and the subprocess process instance has exited through one of its own entry points.

Figure 2 The Work Item List

Summary: 1 items, 1 started, 0 overdue　　-- Select an action --　Apply

Select	Process	ID	Application	Required Action	Priority	Due Date
○	process	44	CreditHistory	Check Authorization	normal	none

Help

The Work Item List contains the following information for each work item listed:

Process. This is the name assigned to the specific work request or business process instance that the work item is a part of. For example, according to this work list, offices are being set up for these users: bogey, JohnSmith, and Howard Jones.

ID. This is the number that identifies the process instance.

Application. This is the application used to handle the process that this work item is a part of.

Required Action. This is the action that is required for this work item to be completed.

Priority. This is the level of importance assigned to this work item.

Due Date. This is the date by which the required action must be taken. Once the due date for a work item has passed, that item becomes expired. However, unless an administrator suspends it, the user can still accept and finish the required action for the expired work item.

There are also several icons used in the Work Item List:

	Signifies a work item that has been accepted.
	Signifies a work item that has not been accepted.
	Signifies a required action that is assigned to a group of people. Any member of this group can complete the action.
	Signifies a work item that is due today.
	In the Due Date column, next to the date. Signifies a work item that is past its due date. The due date of an overdue work item will be displayed in red.
	In the Process column, next to the process name. Signifies a work item that is a result of an exception.
	Signifies a work item that is a custom activity. The work item is available for viewing, but no action is taking place in the process because the work items have been passed to another program.

Viewing a Work Item

You may want to view the form for a work item if the work item is assigned to a group that you are a member of. You can view the item in order to determine whether you will accept it. For information about accepting a work item, see Accepting a Work Item. You can view a work item in two ways.

To view a work item:

1. In Process Express, select the Work Item List tab.
2. Select the radio button next to the work item you want to view.

3. From the drop-down list on the top right of the form, select View Item.

   The form for that work item will appear.

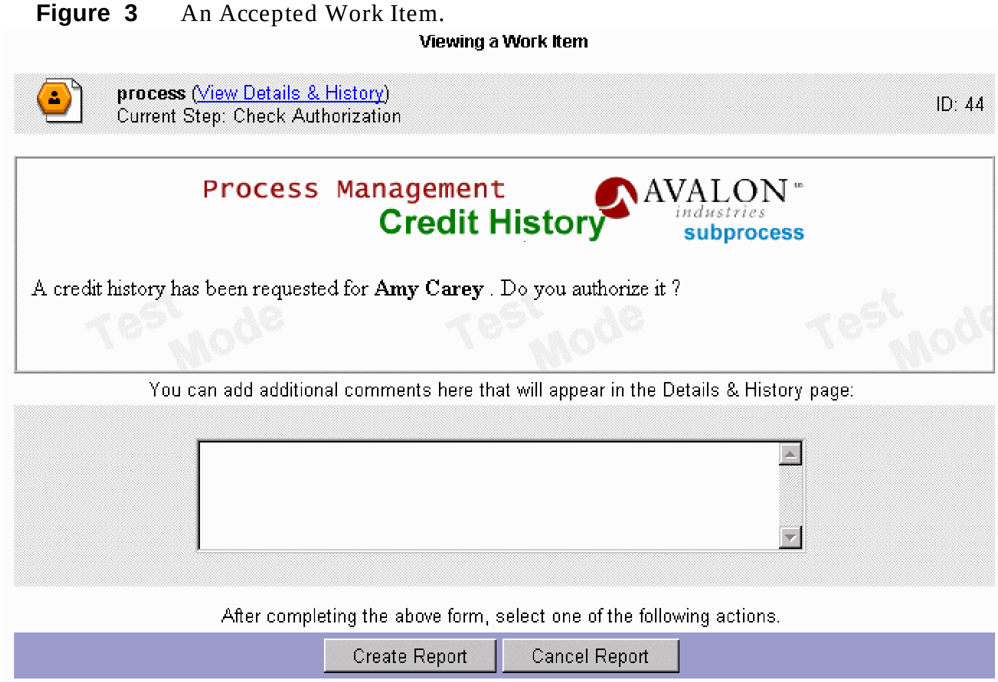
Or

1. In Process Express, select the Work Item List tab.
2. Click the name of the work item that you want to view. The form for that work item will appear.

The form that you view is different depending on whether or not you have accepted the work item. If the work item is assigned to a group that you are a member of, but you have not accepted the item, the form cannot be edited. The action bar will be at the top of the form and will contain at least an Accept button. For information about accepting a work item, see Accepting a Work Item.

The form for a work item that you have accepted will be editable. The action bar will be at the bottom of the form and will not contain an Accept button. Figure 3 shows the form for an accepted work item.

Figure 3 An Accepted Work Item.



Accepting a Work Item

Accepting a work item causes the work item to be active. In other words, you are able to edit the form for that work item. Before a work item is accepted, it is available, but not active.

If a work item is only assigned to you, the item is automatically considered accepted and the form is editable. Work items need to be manually accepted only if they are assigned to a group. In which case, one member of the group must accept the work item. When a work item is assigned to a group of users, and one of those users accepts the item, the work item disappears from the work item lists of all other members of the group. It is then only assigned to the member who accepted it.

There are two ways to accept a work item.

To accept a work item:

1. In Process Express, select the Work Item List tab.
2. Select the radio button next to the work item you want to accept.
3. From the drop-down list on the top right, select Accept Item.

   The editable form for that work item appears. The action bar is at the bottom of the form and does not contain an Accept button. Figure 3 shows the form for an accepted work item. For information about working on this work item, see Working on Your Accepted Work Item.

Or

1. In Process Express, select the Work Item List tab.
2. Select the radio button next to the work item you want to accept.
3. From the drop-down list on the top right, select View Item.

   The form for that work items appears. The form can not be edited. The action bar is at the top of the form and it contains an Accept button.

4. Click the Accept button. The editable form for that work item appears. The action bar will now be at the bottom of the form and does not contain an Accept button. For information about working on this work item, see

Working on Your Accepted Work Item

The form for an accepted work item is editable. You need to edit this form and select an action from the action bar at the bottom of the form in order to complete the work item and remove it from your Work Item List.

A work item’s form may also have a comments text box. The comments you enter into this text box are recorder to a history log. They do not appear in the form for the next work item in the process.

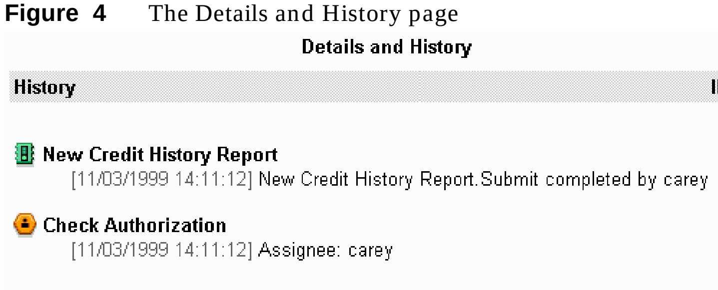
Important. You must click a button in the action bar before exiting an edited work item form. If you do not click one of these buttons, the changes you made to the form are not saved.

Note. By default, work items assigned to only one Process Express user are accepted by that user. The form for that work item is automatically editable.

Viewing the Details and History of a Work Item

The history of a work item can be helpful in understanding how a work item fits into a process. It can help you to understand your role and the roles of others in completing the process. It also shows you by whom and when the process was created.

Figure 4 The Details and History page



Details and history information includes:

- the name of the process that the work item belongs to
- the application
- the date the process was initiated
- the date the process was last modified
- the due date of the work item
- the status of the work item
- the history of the work item that shows the current step, the description of the work item, and the user to whom the work item is assigned

There are two ways to view the details and history of a work item. To view the details and history of a work item:

1. In Process Express, select the Work Item List tab.
2. Select the radio button next to the work item for which you want to view the details and history.
3. From the drop-down list on the top right of the form, select View Details and History.

   A history dialog box for that work item appears.

Or

1. In Process Express, select the Work Item List tab.
2. Select the radio button next to the work item for which you want to view the details and history.
3. From the drop-down list on the top right of the form, select either View Item or Accept Item.

   The form for that work item appears.

4. Click the "View Details and History" link at the top of the form. A history dialog box for that work item appears.

Saving a Work Item

The process designer can design an application so that you have permission to save a work item. If you do have permission to save the current work item, a Save button appears in the action bar on that work item's form. By saving a work item, you do not have to complete your task at that moment, but you can return at a later time to complete it.

Delegating a Work Item

The process designer can design an application so that you have permission to delegate a work item. If you do have permission to delegate the current work item, a Delegate button appears in the action bar on that work item's form. By delegating a work item, you assign it to another Process Express user. The work item then disappears from your work list and appears on the other person's list.

To delegate a work item:

1. In Process Express, select the Work Item List tab.
2. Select the radio button next to the work item you want to accept.
3. From the drop-down list on the top right of the form, select Delegate Item.
4. Click the Apply button. The Delegate This Work Item form appears
5. In the “Delegate work item to” field, enter the user ID or name of the user to whom you are delegating a work item.
6. Click the Find button. A list of found users appears.
7. Select a name from the list of found users.
8. Click the Delegate button.

Specifying How Many Work Items Appear in the Work List

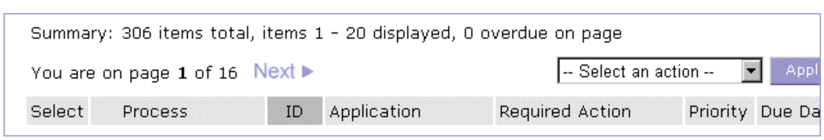
You can specify how many work items appear on a page in your work list and then you can page back and forth through the pages of your work list.

To use this feature, access the work list in Process Express by using a fully-qualified domain name, for example, `http://abc.mydomain.com/Express.npm`. (

Note: If you do not use the full domain name, for example you use `http://abc/Express.npm`, the paging feature might not work.

The top of the work listFigure 5 shows an example of the top of the work list.

Figure 5 The top of the work list

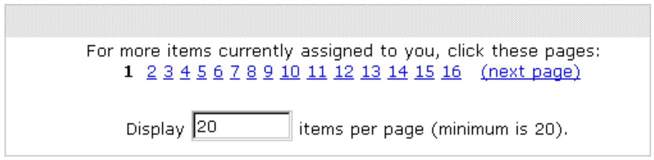


To specify how many work items are displayed on a page, enter the desired number in the Display field at the bottom of the work list and press Return or Enter. The change does not take effect until you press Return or Enter.

Use the navigation buttons at the bottom of the page to page through the work list.

Figure 6 illustrates the Display field and the navigation buttons at the bottom of the page:

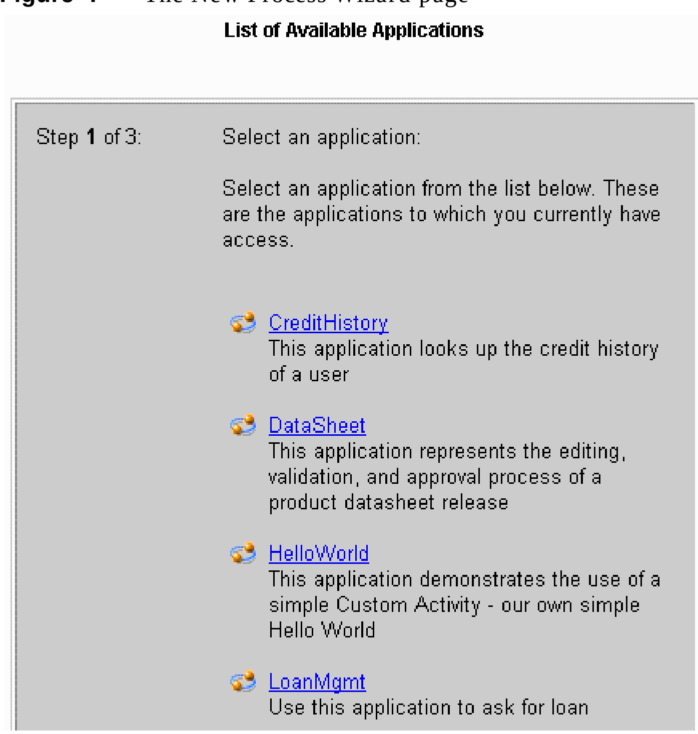
Figure 6 The Display field and the navigation buttons



The New Process Wizard

You may have been granted permissions to use the New Process Wizard. The New Process Wizard allows you to initiate new processes. It takes you through a series of forms that help you to initiate a process.

Figure 7 The New Process Wizard page



Initiating a New Process

A process is a series of tasks, or work items, that are completed by Process Express users for an application. The first task to initiate a new instance of the work request or business process. When initiating a process, you choose an application and create a new process instance of it.

To initiate a new process:

1. In Process Express, select the New Process tab. A list of the applications to which you have access appears.
2. Click the name of the application that handles the type of process you are creating. A list of the forms available for that applications appears.
3. Click the name of the form you want to use to create the new process. A form appears.
4. Complete the form.
5. From the action bar at the bottom of the form, click the button for the action you want to take.

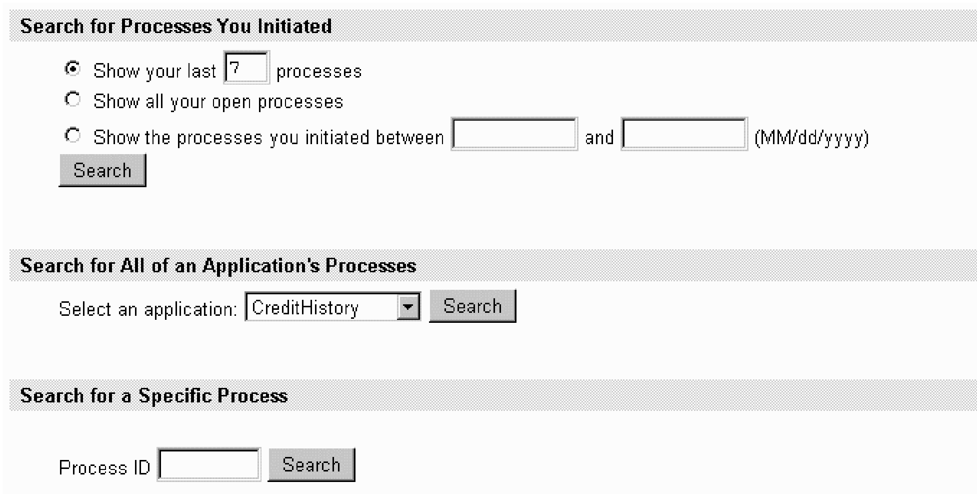
The Search Form

You may have been granted permission to use the Search form. The search form allows you to search for specific work items or processes. From this form, you can perform three types of searches:

- You can search for processes that you initiated.
- You can search for an application's open processes.
- You can search for a specific process.

Figure 8 shows the Search form.

Figure 8 The Search Form.



As shown in the above figure, the items on the Search form are:

Show Your Last *x* Processes. Use this radio button and field to search for the last *x* processes you created. *x* is a number.

Show All Your Open Processes. Use this radio button to search for all of the processes you have created that are not yet completed. The processes can be in state of available or suspended.

Show the Processes You Initiated Between *x* and *y*. Use this radio button and the corresponding fields to search for all of the processes you created during a certain time period. *x* and *y* are dates that you should enter using the *mm/dd/yyyy* format. For example, if you want to search for all of the processes you created between January 1st, 1999 and February 1st, 1999, you would enter 01/01/1999 in the first field and 02/01/1999 in the second field.

Select an Application. Use this drop-down list to search for the open processes for a specific process application.

Process ID. Use this field to enter the identification number of the specific work item for which you are searching.

Note . There are three Search buttons on the Search form; one for each type of search you can perform. Be sure to use the appropriate search button for the type of search you are performing.

Searching for Processes and Work Items

You may want to view the status of a process you created or view the open (not yet completed) processes for a certain application. You may want to look at the status of a particular work item. To find these processes or work items, you need to use the Search form. You can only use this form if the application designer has granted you access to it.

Note. You can only search for open processes. If a process is closed or terminated, it does not appear in your search results.

There are three ways to search:

- Search for processes that you initiated.
- Search for an application's open processes.
- Search for a specific process.

To search for processes you initiated:

1. In Process Express, select the Search tab. The Search form appears.
2. From the top section of the Search form, select a radio button to specify which processes you want to search for. You can choose to search for
   - The last *x* processes you initiated - where *x* is a number you specify
   - All of your open processes
   - The processes you initiated between *x* and *y* - where *x* is a beginning date and *y* is an end date.
3. Click the Search button. The Search Results page appears showing only those processes you searched for.

Figure 9 The Search Result page

Searching for Processes You Initiated

Search result — 1 process instance(s) found

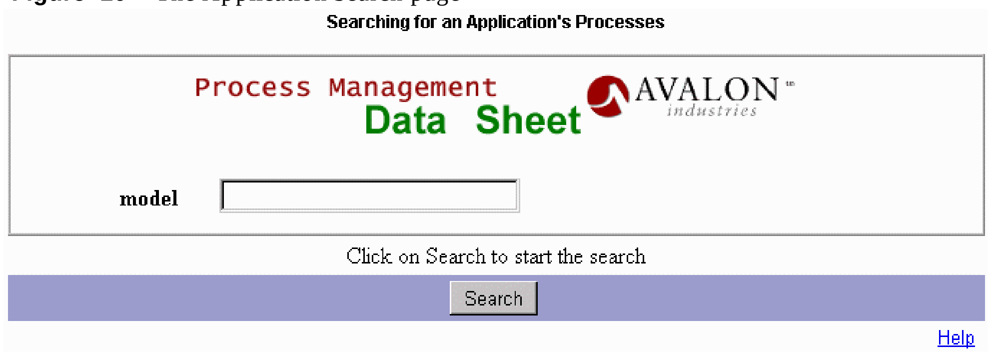
Process Instance	ID	Application	Priority	Current Work Items	Work Item Due Date
process	44	CreditHistory	3	Check Authorization	none

Help

To search for an application's processes:

1. In Process Express, select the Search tab. The Search form appears.
2. From the drop-down list in the middle section of the Search form, choose the name of the application for which you want to find all processes.
3. Click the Search button. The Application Search form appears.

Figure 10 The Application Search page

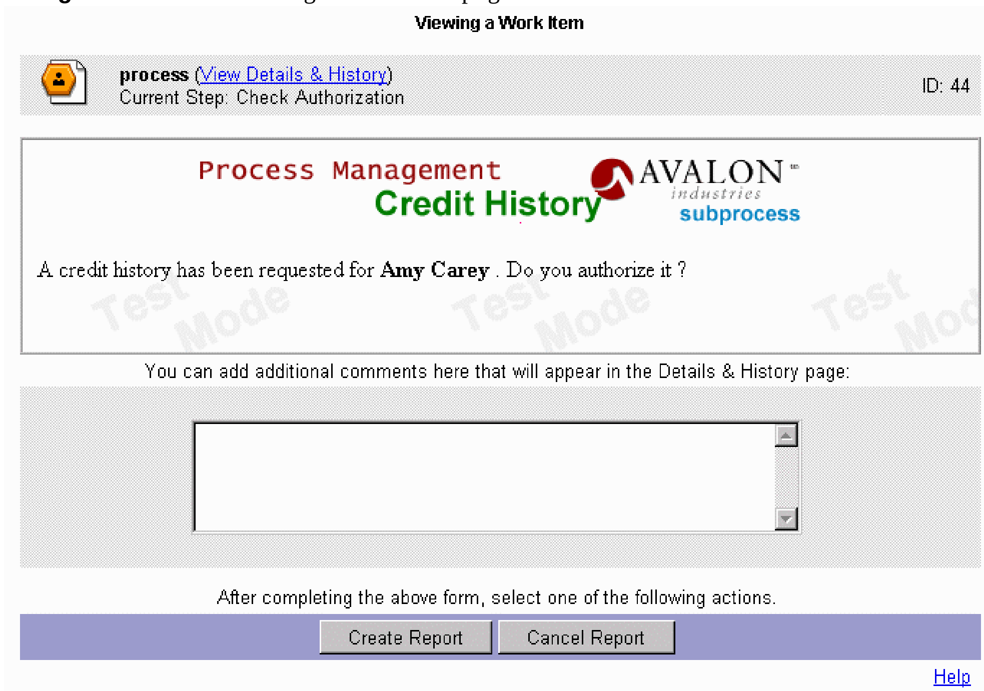


4. If the form has editable fields, enter the appropriate value into the fields. You may enter text into the fields to find an exact match, or you can use the % character as a wildcard for substring matches.
5. Click the Search button. An Application Search Results list appears that contains only those processes that you searched for.

To open a specific process:

1. In Process Express, select the Search tab. The Search form appears.
2. Enter the process identification number in the Process ID field at the bottom of the form.
3. Click the Search button. The form for that process appears.

Figure 11 The Viewing a Work Item page



Important Terminology

Application. A Process Manager application defines the tasks, routings, and assignments in a business process. Designers use Process Builder to create Process Manager applications.

Builder. The builder is the person who uses Process Builder to design the software, or applications, to handle processes.

Group. A group is a group of people with the ability to perform a certain role or activity. For instance, all members of the Art Department group have the ability to create the graphics for their company's documentation.

Parallel processing application. An application that branches between two or more branches so that two or more work items can execute in parallel.

Process. A process is a series of tasks, or work items, that can be completed by Process Express users through a process application.

Process Builder. Process Builder is the part of Process Manager used to design and build the Process Manager applications.

Subprocess. A fully functional process that is called from within another process. The process that calls the subprocess is the parent process and the subprocess is its child process.

Work Item. A work item is an individual task in a process.