

Working with webMethods Business Console

Version 10.5

October 2019

This document applies to Business Console Version 10.5 and to all subsequent releases.

Specifications contained herein are subject to change and these changes will be reported in subsequent release notes or new editions.

Copyright © 2014-2019 Software AG, Darmstadt, Germany and/or Software AG USA Inc., Reston, VA, USA, and/or its subsidiaries and/or its affiliates and/or their licensors.

The name Software AG and all Software AG product names are either trademarks or registered trademarks of Software AG and/or Software AG USA Inc. and/or its subsidiaries and/or its affiliates and/or their licensors. Other company and product names mentioned herein may be trademarks of their respective owners.

Detailed information on trademarks and patents owned by Software AG and/or its subsidiaries is located at <http://softwareag.com/licenses>.

Use of this software is subject to adherence to Software AG's licensing conditions and terms. These terms are part of the product documentation, located at <http://softwareag.com/licenses> and/or in the root installation directory of the licensed product(s).

This software may include portions of third-party products. For third-party copyright notices, license terms, additional rights or restrictions, please refer to "License Texts, Copyright Notices and Disclaimers of Third Party Products". For certain specific third-party license restrictions, please refer to section E of the Legal Notices available under "License Terms and Conditions for Use of Software AG Products / Copyright and Trademark Notices of Software AG Products". These documents are part of the product documentation, located at <http://softwareag.com/licenses> and/or in the root installation directory of the licensed product(s).

Use, reproduction, transfer, publication or disclosure is prohibited except as specifically provided for in your License Agreement with Software AG.

Table of Contents

| | |
|--|-----------|
| About this Guide | 7 |
| Document Conventions..... | 7 |
| Online Information and Support..... | 8 |
| Data Protection..... | 9 |
| Overview | 11 |
| About Business Console..... | 12 |
| Business Console Features..... | 12 |
| Getting Started | 15 |
| Pre-Requisites..... | 16 |
| Products Required for Enabling Business Console Capabilities..... | 16 |
| Users, Roles, and Groups..... | 18 |
| Assigning AgileApps Cloud Roles to Users..... | 18 |
| Viewing and Updating Your Profile..... | 19 |
| Opening the Business Console User Interface..... | 19 |
| Setting a Landing Page..... | 19 |
| Logging Out of Business Console..... | 22 |
| Administering Business Console | 23 |
| Configuring Servers for Business Console..... | 24 |
| Configuring Business Console with Twitter..... | 26 |
| Creating Twitter Account for Business Console..... | 26 |
| Configuring User Endorsement Rating..... | 27 |
| Configuring To-Do List Setting..... | 27 |
| Configuring Task Type Setting..... | 28 |
| Configuring Work Stream..... | 29 |
| Configuring AppSpace Settings..... | 29 |
| Resetting the Landing Page..... | 30 |
| Configuring the Analytical Engine for Business Console..... | 30 |
| Setting the Maximum Number of Columns in Work Stream..... | 31 |
| Setting the Maximum Number of Legends in a Chart..... | 31 |
| Setting the People Picker Preferences..... | 32 |
| Configuring HPSTRA Settings..... | 32 |
| Configuring the Session Timeout Settings..... | 32 |
| Configuring the REST Service Timeout Settings..... | 33 |
| Enabling Inbox Set Status Action..... | 33 |
| Managing Task Types Using My webMethods..... | 34 |
| Creating and Deploying a Task Type with the Task Business Data Gadget..... | 34 |
| Customizing Business Console..... | 34 |
| Customizing Business Console Using Gadgets..... | 37 |
| Creating Business Console AppSpaces Using Gadgets..... | 38 |

| | |
|--|-----------|
| Editing AppSpace Using Gadgets..... | 39 |
| Viewing an AppSpace in a Web Browser..... | 40 |
| Viewing Standalone AppSpaces..... | 41 |
| Exporting an AppSpace As a .cdp File..... | 41 |
| Exporting an AppSpace As an .xml File..... | 41 |
| Importing an AppSpace..... | 42 |
| Deploying an AppSpace using the File System..... | 42 |
| Deploying an AppSpace using the Install Option..... | 43 |
| Importing an AppSpace to My webMethods Server..... | 43 |
| Understanding Built-in Gadgets..... | 44 |
| Common Gadgets..... | 45 |
| MashZone NextGen Gadgets..... | 55 |
| Configuring Communication Among MashZone NextGen Gadgets..... | 55 |
| Case Related Gadgets..... | 56 |
| Process Related Gadgets..... | 62 |
| Task Related Gadgets..... | 67 |
| Code Samples..... | 79 |
| Managing AppSpace Groups..... | 81 |
| Customizing Process Details Using Gadgets..... | 81 |
| Customizing Start Task Page using Gadgets..... | 81 |
| Customizing Task Details Using Gadgets..... | 82 |
| Assigning Gadget Access Permissions..... | 82 |
| Assigning AppSpace and AppSpace Group Access Permissions..... | 82 |
| Installing Sample Gadgets..... | 83 |
| About Work Stream..... | 85 |
| About Work Stream..... | 86 |
| Operations You Can Perform in Work Stream..... | 86 |
| Showing and Hiding Projects in Work Stream..... | 87 |
| About Cases..... | 89 |
| Managing Cases..... | 90 |
| Configuring AgileApps as a Service Provider to Access Cases..... | 90 |
| Case List Operations..... | 91 |
| Case Instance Operations..... | 92 |
| Case Properties..... | 92 |
| Claiming Cases..... | 93 |
| Assigning Cases..... | 94 |
| Adding Activities to Case Instances..... | 94 |
| Actions in a Case Activity..... | 95 |
| Case Actions..... | 95 |
| Starting Cases..... | 95 |
| Customizing Case Keylinks..... | 96 |
| Searching for Case Instances..... | 96 |
| Collaborating Case Activities..... | 96 |

| | |
|--|------------|
| About Processes..... | 99 |
| Managing Processes..... | 100 |
| Process Instance Details..... | 100 |
| Viewing Business Rules Decision Entities..... | 101 |
| Customizing Task Instance Panel..... | 102 |
| Process Instance Statuses..... | 103 |
| About Tasks..... | 105 |
| Managing Tasks..... | 106 |
| Task List Operations..... | 106 |
| Task Instance Operations..... | 107 |
| Task Properties..... | 109 |
| Task Priority..... | 111 |
| Task Actions..... | 111 |
| Task Status..... | 112 |
| Scheduling Tasks..... | 113 |
| Rescheduling Tasks..... | 113 |
| My Calendar..... | 114 |
| Searching for Tasks using My Calendar..... | 115 |
| Scheduling Task Delegations..... | 115 |
| Starting Tasks..... | 116 |
| Using Instant Task Tab..... | 117 |
| Using Start Task Option..... | 117 |
| Start Task Properties..... | 118 |
| Customizing Task Keylinks..... | 118 |
| Searching for Task Instances..... | 118 |
| Using Saved Searches..... | 119 |
| Using To-Do Lists..... | 120 |
| Creating To-Do List Templates..... | 121 |
| Viewing, Updating, or Deleting To-Do List Templates..... | 122 |
| Creating To-Do Lists..... | 122 |
| Viewing and Updating To-Do Lists..... | 123 |
| To-Do List Attributes..... | 123 |
| Task Charting and Analyzing Task Activities..... | 124 |
| Editing Chart Settings..... | 125 |
| Collaborating Task Activities..... | 126 |
| Creating an Instant Task..... | 126 |
| New Instant Task..... | 127 |
| Managing Your Task Inbox..... | 127 |
| Using Social Guidance for Task Execution..... | 131 |
| Social Guidance in Business Console..... | 132 |
| Endorsement Methods..... | 132 |
| Endorsement Properties in My webMethods Server..... | 133 |
| Networking with Task Experts..... | 133 |

| | |
|--|------------|
| Viewing Trending Information on Social Media..... | 134 |
| Using Services for Business Process Guidance..... | 135 |
| Overview..... | 136 |
| Summary of Services Available for Business Process Guidance..... | 136 |
| Summary of Data Structures..... | 137 |
| Social Guidance Service URLs..... | 138 |
| Extracting the WSDL for Social Guidance Services..... | 138 |
| addKeyword..... | 139 |
| addKeywords..... | 139 |
| deleteKeyword..... | 139 |
| deleteKeywords..... | 140 |
| getKeyword..... | 140 |
| listKeywords..... | 140 |
| updateKeyword..... | 141 |
| updateKeywords..... | 141 |
| getTaskExpertList..... | 141 |
| listSkillsByUser..... | 142 |
| addTagsToTask..... | 142 |
| deleteTagsFromTask..... | 143 |
| listTagsByTask..... | 143 |
| updateTaskTags..... | 143 |
| endorseUser..... | 144 |
| deleteEndorsementForUser..... | 144 |
| endorseUserBasedOnTask..... | 144 |
| Keyword..... | 145 |
| Guidance..... | 145 |
| Endorsement..... | 145 |
| Admin User Reference..... | 147 |
| Non-Admin User Reference..... | 149 |
| Icon Reference..... | 157 |
| Permission Reference..... | 159 |

About this Guide

This guide is for users of webMethods Business Console, a web and tablet friendly user interface for administering, managing, and monitoring business processes.

Both user-oriented and administrator-oriented features are documented here; however, Business Console features are available to users based on the privileges of their role.

To use this guide effectively, you should be familiar with:

- Process model design and business process monitoring. For more information, see *Software AG Designer Online Help*, *webMethods Monitor User's Guide*, and *Working with Business Process Dashboards*.
- AgileApps Cloud case management. For more information, see AgileApps Cloud documentation.
- Working with tasks in the My webMethods environment. For more information about conceptual and procedural information, see the PDF publication *webMethods Task Engine User's Guide*.
- General terminology and usage of My webMethods. For more information, see the PDF publication *Administering My webMethods Server* and *Working with My webMethods*.

Important: If you have a lower fix level installed, some of the features described in this document might not be available to you. For a cumulative list of fixes and features, see the latest fix readme on the Empower website at "<https://empower.softwareag.com>".

Document Conventions

| Convention | Description |
|---------------|--|
| Bold | Identifies elements on a screen. |
| Narrowfont | Identifies service names and locations in the format <i>folder.subfolder.service</i> , APIs, Java classes, methods, properties. |
| <i>Italic</i> | Identifies: Variables for which you must supply values specific to your own situation or environment. New terms the first time they occur in the text. |

| Convention | Description |
|-------------------|--|
| | References to other documentation sources. |
| Monospace font | Identifies: Text you must type in. Messages displayed by the system. Program code. |
| { } | Indicates a set of choices from which you must choose one. Type only the information inside the curly braces. Do not type the { } symbols. |
| | Separates two mutually exclusive choices in a syntax line. Type one of these choices. Do not type the symbol. |
| [] | Indicates one or more options. Type only the information inside the square brackets. Do not type the [] symbols. |
| ... | Indicates that you can type multiple options of the same type. Type only the information. Do not type the ellipsis (...). |

Online Information and Support

Software AG Documentation Website

You can find documentation on the Software AG Documentation website at ["http://documentation.softwareag.com"](http://documentation.softwareag.com). The site requires credentials for Software AG's Product Support site Empower. If you do not have Empower credentials, you must use the TECHcommunity website.

Software AG Empower Product Support Website

If you do not yet have an account for Empower, send an email to ["empower@softwareag.com"](mailto:empower@softwareag.com) with your name, company, and company email address and request an account.

Once you have an account, you can open Support Incidents online via the eService section of Empower at ["https://empower.softwareag.com/"](https://empower.softwareag.com/).

You can find product information on the Software AG Empower Product Support website at ["https://empower.softwareag.com"](https://empower.softwareag.com/).

To submit feature/enhancement requests, get information about product availability, and download products, go to ["Products"](#).

To get information about fixes and to read early warnings, technical papers, and knowledge base articles, go to the [“Knowledge Center”](#).

If you have any questions, you can find a local or toll-free number for your country in our Global Support Contact Directory at [“https://empower.softwareag.com/public_directory.asp”](https://empower.softwareag.com/public_directory.asp) and give us a call.

Software AG TECHcommunity

You can find documentation and other technical information on the Software AG TECHcommunity website at [“http://techcommunity.softwareag.com”](http://techcommunity.softwareag.com). You can:

- Access product documentation, if you have TECHcommunity credentials. If you do not, you will need to register and specify "Documentation" as an area of interest.
- Access articles, code samples, demos, and tutorials.
- Use the online discussion forums, moderated by Software AG professionals, to ask questions, discuss best practices, and learn how other customers are using Software AG technology.
- Link to external websites that discuss open standards and web technology.

Data Protection

Software AG products provide functionality with respect to processing of personal data according to the EU General Data Protection Regulation (GDPR). Where applicable, appropriate steps are documented in the respective administration documentation.

1 Overview

- About Business Console 12
- Business Console Features 12

About Business Console

webMethods Business Console is a business window for complex business processing and analytical engines. Business Console uses the capabilities of business process management suite of products, and helps you manage your business processes and perform real-time analysis.

Business Console provides you consolidated and detailed views, AppSpaces, analytics, charting, social guidance, and collaboration environment for executing:

- Business processes and tasks configured in My webMethods Server
- Cases configured in AgileApps Cloud

Business Console is a web and tablet friendly responsive interface for viewing, monitoring, assigning, collaborating, analyzing, escalating, and executing business cases, processes, and tasks. It is a role-based monitoring and social guidance tool for managing business processes.

Business managers can:

- Monitor and analyze business cases, processes, and tasks using AppSpaces, drill-able process models, and charts.
- Manage team and task assignments.
- Escalate tasks, network with experts, endorse experts, and view trending information related to business processes on social media.

Business operators can:

- View, act, and collaborate on the assigned tasks.
- Take help from experts to complete tasks faster and more effectively.
- Execute webMethods processes and tasks.
- Monitor AgileApps Cloud cases.

Administrators can:

- Customize Business Console
- Assign role-based permissions

Business Console Features

Business Console provides you a rich, simple, scalable, and customizable user interface. You can use the customize options on the user interface or use the RESTful APIs to customize the user interface, which is launched using My webMethods Server.

The access and functional privileges assigned to you as a My webMethods Server user define the capabilities available to you in Business Console.

The table below lists the operations you can perform from tabs in Business Console.

| In Business Console... | You can... |
|---|--|
| Home > What's Happening Now | <ul style="list-style-type: none"> ■ Monitor process instances, task instances, and case instances in the Work Stream panel. ■ View task charting in the Task Activity panel. ■ View and collaborate task activities such as posting comments, adding attachments, creating child tasks, and configuring task actions in the Activity Stream panel. ■ Quickly identify tasks for a day in My Calendar. ■ Search social networking site for posts related to your tasks and view trending information in the Twitter Stream panel. ■ Use social guidance to identify user expertise, endorse users, and improve business processes in the Task Experts panel. |
| Home > Task Inbox | <ul style="list-style-type: none"> ■ Search, view, and execute tasks assigned to you either directly in your user account, or indirectly, through a role or group that you are a member of. |
| Home > AppSpace or AppSpace | <ul style="list-style-type: none"> ■ Create new customized AppSpaces using gadgets. ■ Group AppSpaces and enable role-based access. ■ Edit AppSpaces and configure the gadgets used in the AppSpace. ■ Delete AppSpaces and AppSpace groups. ■ Use an AppSpace as the default landing page instead of the What's Happening Now page. |
| Processes | <ul style="list-style-type: none"> ■ View process diagram with interactive step metrics. ■ View process instance details, step details, and rule violations. ■ View data comparison metrics. |
| <p>For more information, see <i>webMethods Optimize User's Guide</i>.</p> | |

In Business Console...**You can...**

Analytics

- View general runtime health of business processes on dashboard.
- View process metrics for a specified date range.
- Create escalation tasks and assign these tasks to appropriate individuals.
- Email tasks and escalation actions including contextual information about the task escalated or emailed.
- View process alarms.

For more information, see *Working with Business Process Dashboards*.

2 Getting Started

| | |
|---|----|
| ■ Pre-Requisites | 16 |
| ■ Users, Roles, and Groups | 18 |
| ■ Opening the Business Console User Interface | 19 |
| ■ Setting a Landing Page | 19 |
| ■ Logging Out of Business Console | 22 |

Pre-Requisites

Before you begin, you must:

1. Install and configure Business Console along with the required products. See [“Products Required for Enabling Business Console Capabilities” on page 16.](#)
2. Configure products to use the same user directory service.
3. Create user accounts in My webMethods Server. See the *Administering My webMethods Server* guide.
4. Configure permissions. See [“Users, Roles, and Groups” on page 18.](#)

Products Required for Enabling Business Console Capabilities

The table below lists the products required for enabling various capabilities in Business Console.

| For enabling... | Install and configure... |
|--|--|
| webMethods task management | <ul style="list-style-type: none"> ■ webMethods Task Engine ■ webMethods Integration Server ■ My webMethods Server ■ webMethods Database Component Configurator |
| webMethods process and task management | <ul style="list-style-type: none"> ■ webMethods Task Engine ■ webMethods Process Engine ■ webMethods Integration Server ■ My webMethods Server ■ webMethods Monitor ■ webMethods Database Component Configurator |
| AgileApps Cloud case management | <ul style="list-style-type: none"> ■ AgileApps Cloud ■ webMethods Integration Server ■ My webMethods Server |
| AgileApps Cloud case management along with webMethods process management | <ul style="list-style-type: none"> ■ AgileApps Cloud ■ webMethods Task Engine |

For enabling...

webMethods process management using **webMethods Optimize** in **Processes** tab

Business process analysis in **Analytics** tab

Install and configure...

- webMethods Process Engine
- webMethods Integration Server
- My webMethods Server
- webMethods Monitor
- webMethods Database Component Configurator

- Optimize
- webMethods Task Engine
- webMethods Process Engine
- webMethods Integration Server
- My webMethods Server
- webMethods Monitor
- webMethods Database Component Configurator

For more information, see *webMethods Optimize User's Guide*.

Note: You can use Business Console features except the **Processes** tab without installing and configuring Optimize.

- webMethods Task Engine
- webMethods Rules Engine
- Software AG MashZone
- webMethods Process Engine
- webMethods Integration Server
- My webMethods Server
- webMethods Monitor
- webMethods Database Component Configurator

For more information, see *Working with Business Process Dashboards*.

Note: You can use Business Console features except the **Analytics** tab without installing and configuring Software AG MashZone.

Users, Roles, and Groups

Business Console access control and management of user, group, and role are performed through My webMethods Server user interface. Business Console features are assigned based on your user account, or your membership in one or more groups or roles in My webMethods Server.

Two categories of Business Console users:

- Administrators
- Other users


Business Console users require functional privileges for Task Engine, and the ACL privileges for Integration Server and Monitor.

Assigning AgileApps Cloud Roles to Users

Only users with AgileApps Cloud role membership can work on cases in Business Console. For assigning AgileApps Cloud role to a user, My webMethods Server and AgileApps Cloud must use the same user directory service.

To assign AgileApps Cloud role to users

1. Login to My webMethods Server as administrator.
2. Create the AgileApps Cloud role.
 - a. Navigate to **Applications > Administration > System-Wide > User Management > Roles**.
 - b. Click **Add Role**.
 - c. In the **Role Name** field, type the AgileApps Cloud role name you want to assign to a user.

Make sure to provide the exact AgileApps Cloud role name. Role name is case-sensitive.
 - d. Move the role provider to the **Selected Items** box.
 - e. Click **Create Role**.
3. Assign the AgileApps Cloud role to My webMethods Server users.
 - a. Navigate to **Applications > Administration > System-Wide > User Management > Roles**.
 - b. Search for the AgileApps Cloud role to which you want to add users.
 - c. In the search results, click the role name or click the Edit icon .
 - d. On the **Members** tab, click **Edit Members**.

- e. In the **Keywords** field, type a keyword representing the users you want to search for, and click **Search**.
- f. Move one or more users to the **Selected** box.

Note: The selected users must have a valid first name, last name, and email address. For information about editing the information for a user, see the *Administering My webMethods Server* guide.

- g. Click **Apply**.

Viewing and Updating Your Profile

Business Console uses the user details, groups, and roles configured in My webMethods Server.

To view and update your profile

1. Use the **Update Profile** option in the administration menu.
2. To edit the profile, type the new values in the fields, and click **Save**.
3. To change the profile picture, click **Update Profile Picture**, and upload the new profile picture.

Opening the Business Console User Interface

Use the following procedure to open the Business Console user interface.

To open the Business Console user interface

1. In your browser, provide the following URL:

```
http://host:port/business.console
```

host The name or IP address of the machine on which My webMethods Server is running.



port The port used by My webMethods.

2. Enter your My webMethods Server user ID and password.

Setting a Landing Page

The Home page is the default landing page when you log on to Business Console. You can customize the landing page according to your preferences. Business Console uses an order of precedence to determine the landing page to display for a user.

The following table lists the options in Business Console to set a landing page, and the privileges that you must have to perform each task.

| <u>To</u> | <u>Privilege Required</u> | <u>Action</u> | <u>Order Of Precedence</u> |
|--|--|--|----------------------------|
| (Option 1) Set a landing page for yourself | Administration privileges for Business Console | Select Landing Page from the menu options on the Customize Business Console page. See “Customizing Business Console” on page 37 for more information. | First |
| (Option 2) Set an AppSpace as the landing page for yourself | | Click  and select Set as Landing Page . See “Editing AppSpace Using Gadgets” on page 39 for more information. | Second |
| (Option 3) Set an AppSpace as the landing page for specific Business Console users | Administration privileges for Business Console | Click  and select Set as Landing Page for | Third |

| <u>To</u> | <u>Privilege Required</u> | <u>Action</u> | <u>Order Of Precedence</u> |
|-----------|---------------------------|---|----------------------------|
| | | Specific Users. See “Editing AppSpace Using Gadgets” on page 39 for more information. | |

Order of Precedence

Business Console uses an order of precedence to determine a landing page to display.

The order of precedence for displaying a landing page is as follows:

- **Option 1.** Setting a landing page for yourself in Business Console is first in priority.
- **Option 2.** Setting an AppSpace as the landing page for yourself is second in priority.
- **Option 3.** Setting an AppSpace as the landing page for specific Business Console users is third in priority.

The following example describes the order of precedence:

Consider that John has both Administrative and user privileges. He is in the group BC1 and belongs to the role User. John uses option 1 to set a landing page MyPage. Additionally, John uses option 2 to set an AppSpace MyApp as his landing page. The Administrator also uses option 3 to set a specific AppSpace BC1App as John's landing page.

In this example, the landing page MyPage (set using option 1) is displayed in Business Console for John.

If option 1 is not configured, MyApp (set using option 2) is displayed as the landing page for John. If option 1 and option 2 are not configured, BC1App (set using option 3) is displayed as the landing page for John.

Moreover, the Administrator can use option 3 to set a default landing page for users, groups, and roles. For example, consider that the Administrator sets BC1 as the landing page for John's group, Role 1 as the landing page for John's User role, and J1 as the landing page for John. In this case, when John logs on, J1 is displayed as the default landing page. If J1 is not set, the landing page for John's User role Role1 is displayed. If both J1 and Role 1 are not set, the landing page for John's group BC1 is displayed.

Logging Out of Business Console

Use the following procedure to log out of Business Console.

To log out of Business Console

1. Navigate to the administration menu located on the Business Console title bar.
2. Click **Logout**.

3 Administering Business Console

| | |
|---|----|
| ■ Configuring Servers for Business Console | 24 |
| ■ Configuring Business Console with Twitter | 26 |
| ■ Configuring User Endorsement Rating | 27 |
| ■ Configuring To-Do List Setting | 27 |
| ■ Configuring Task Type Setting | 28 |
| ■ Configuring Work Stream | 29 |
| ■ Configuring AppSpace Settings | 29 |
| ■ Configuring the Analytical Engine for Business Console | 30 |
| ■ Setting the Maximum Number of Columns in Work Stream | 31 |
| ■ Setting the Maximum Number of Legends in a Chart | 31 |
| ■ Setting the People Picker Preferences | 32 |
| ■ Configuring HPSTRA Settings | 32 |
| ■ Configuring the Session Timeout Settings | 32 |
| ■ Configuring the REST Service Timeout Settings | 33 |
| ■ Enabling Inbox Set Status Action | 33 |
| ■ Managing Task Types Using My webMethods | 34 |
| ■ Creating and Deploying a Task Type with the Task Business Data Gadget | 34 |
| ■ Customizing Business Console | 34 |
| ■ Customizing Business Console Using Gadgets | 37 |

Configuring Servers for Business Console

Only users with administrator privileges can specify the servers for Business Console.

In the administration menu, select the **Administer Business Console** menu option, and specify the server settings for the following fields:

| Field | Specify... |
|------------------------|---|
| Integration Server URL | <p>URL of the Integration Server that Business Console must connect to. For example, <code>http://localhost:5555</code>.</p> <p>Make sure that Process Engine is configured in the Integration Server.</p> <p>Note: In the URL, if you specify a machine name or IP address, make sure you configure the remote My webMethods Server to allow access to Business Console. See the instructions in “Configure a Remote My webMethods Server to Allow Access to Business Console” on page 25.</p> |
| Task Engine URL | <p>Task Engine configuration for My webMethods Server:</p> <p>URL of the Task Engine that Business Console must connect to. For example, <code>http://localhost:8585</code>.</p> <p>If the Task Engine URL points to a load balancer, then the load balancer must be configured for sticky sessions.</p> <p>TE Server Type: MWS</p> <p>Make sure you have configured the following with Task Engine:</p> <ul style="list-style-type: none"> ■ My webMethods Server ■ Monitor <p>Note: In the URL, if you specify the machine name or IP address, make sure you configure the remote My webMethods Server to allow access to Business Console. See the instructions in “Configure a Remote My webMethods Server to Allow Access to Business Console” on page 25.</p> <p>Task Engine configuration for Integration Server:</p> |

| Field | Specify... |
|---------------------|---|
| | <p>URL of the Task Engine that Business Console must connect to. For example, <code>http://localhost:8585</code>.</p> <p>TE Server Type: IS</p> |
| AgileApps Cloud URL | <p>URL of the AgileApps Cloud sever that Business Console must connect to. Make sure you have configured AgileApps Cloud with My webMethods Server.</p> |

Configure a Remote My webMethods Server to Allow Access to Business Console

If you want to connect Business Console to a remote My webMethods Server, configure the remote My webMethods Server to allow access to Business Console as shown below:

1. In the remote My webMethods Server installation, open the `MWS\server\default\deploy\portal.war\WEB-INF\web.xml` file for edit. The Cross-origin filter contains:

```
<filter>
  <filter-name>cross-origin</filter-name>
  <filter-class>org.eclipse.jetty.servlets.CrossOriginFilter</filter-  class>
</filter>
<filter-mapping>
  <filter-name>cross-origin</filter-name>
  <url-pattern>/cometd/*</url-pattern>
</filter-mapping>
```

2. Change the Cross-origin filter to:

```
<filter>
  <filter-name>cross-origin</filter-name>
  <filter-class>org.eclipse.jetty.servlets.CrossOriginFilter</filter-class>
  <init-param>
    <param-name>allowedMethods</param-name>
    <param-value>GET, POST, HEAD, OPTIONS</param-value>
  </init-param>
  <init-param>
    <param-name>allowCredentials</param-name>
    <param-value>>true</param-value>
  </init-param>
  <init-param>
    <param-name>chainPreflight</param-name>
    <param-value>>false</param-value>
  </init-param>
</filter>
<filter-mapping>
  <filter-name>cross-origin</filter-name>
  <url-pattern>/cometd/*</url-pattern>
  <url-pattern>/rest/*</url-pattern>
</filter-mapping>
```

Configuring Business Console with Twitter

Before you configure and enable the Twitter settings, make sure you have created an account in Twitter. See [“Creating Twitter Account for Business Console” on page 26](#).

Provide the Twitter settings in the Administration page as specified in the table below.

| Fields | Description |
|---|--|
| Enable | Select this option to enable searching and viewing the task related posts on Twitter. |
| Consumer Key, Consumer Secret, Access Token, and Access Token Secret | Provide the corresponding values you obtained from the Twitter website. For registering your Business Console application in the Twitter website and obtaining values for the parameters, see “Creating Twitter Account for Business Console” on page 26 . |
| HTTP Proxy Host, HTTP Proxy Port, HTTP Proxy User, and HTTP Proxy Password | Provide values for these parameters, if you want to configure a proxy server for external network connection. |

Creating Twitter Account for Business Console

To enable Business Console to interact with Twitter, Business Console administrator must first create an account in Twitter, and then provide the Twitter settings in the Administration page as specified in [“Configuring Business Console with Twitter” on page 26](#).

To create an account in Twitter

1. Stop My webMethods Server, if it is running.
2. Access the Twitter website to create a new account.
3. Download the VeriSign Class 3 Public Primary Certification Authority - G3.pem certificate as mentioned in the Twitter website to a local directory.
4. Import the VeriSign Class 3 Public Primary Certification Authority - G3.pem certificate to My webMethods Server.
 - a. Open command prompt and change directory to *Software AG_directory \MWS \server\default\config\security*.
 - b. Use the JVM's keytool command to import the Verisign certificate to the *Software AG_directory \MWS\server\default\config\security* directory as shown

below. For information about importing certificates using the keytool command, see the *Administering My webMethods Server* guide.

```
keytool -import -keystore sagdemoca.jks -file
<path_to_the_downloaded_Verisign_certificate_file> -alias verisignClass3
```

- c. The command prompts you for the password for the certificate file. Type the password. By default, the password is changeit.
 - d. When command prompts: Trust this certificate? [no]:, type y.
5. Start My webMethods Server.

Configuring User Endorsement Rating

Only users with administrator privileges can use the **Administer Business Console** menu option in administration menu to enable endorsements and specify a value for the **Maximum User Endorsement Rating** field.



| Field | Specifies... |
|--|--|
| Maximum User Endorsement Rating | The maximum endorsement rating you can grant to another user. The default value is 1. |
| Do Not Show Endorsements | Whether the endorsements must be displayed in the Task Experts panel and the Task Detail page. |

Configuring To-Do List Setting

Only users with administrator privileges can use the **Administer Business Console** menu option to configure to-do lists.

Configure to-do lists using the settings listed in the table below. For information about creating to-do lists with or without templates, see [“Using To-Do Lists” on page 120](#).

| Field | Specifies... |
|---|--|
| Maximum number of rows per to-do list template | The maximum number of rows you can add to a to-do list template. Tip: If the number of child tasks that you want to add to a to-do list is more than the maximum number of rows allowed in the to-do list template, you can add the additional child tasks to the to-do list by using the same template and the same parent task |

| Field | Specifies... |
|-----------------------------------|--|
| | ID while performing another to-do list creation operation. |
| Allow tags for to-do list | <p>Whether or not you can use tags for to-do lists.</p> <p>Using tags, you can search the to-do lists or the parent task of to-do lists.</p> <p>You can view the tag of a to-do list in the task detail page of the to-do list task.</p> |
| Default tag for to-do list | The default tag for to-do lists. |
| Enable to-do list polling | <p>Whether or not to poll Task Engine for the status of to-do lists.</p> <p>If you have enabled to-do list polling, when you start a to-do list, Business Console polls the Task Engine in regular intervals and displays the updated status of the start operation in the To-Do List dialog. If you want to stop polling that has been going on for a long time, click  at the end of the polling progress bar.</p> <p>You can disable to-do list polling to avoid frequent polling of Task Engine. If you have disabled to-do list polling,  Refresh polling icon is available on the To-Do List dialog for starting manual polling.</p> |

Configuring Task Type Setting

Only users with administrator privileges can use **Administer Business Console** menu option to configure the task type display. The task type settings specifies whether to use the task ID, custom ID, or the task name as the identifier for task instances in Business Console.

Specify one of the following options for the **Display Name** field.

| Select... | To... |
|------------------|---|
| Custom ID | To use custom IDs as the identifier for task instances. The custom IDs are the IDs defined by you for the task instances. |

| Select... | To... |
|------------------|---|
| Task ID | To use the task ID as the identifier for task instances. The task IDs are auto-generated by Task Engine when you queue a task instance. |
| Task Name | To use the task name as the identifier for task instances. The task names are defined by you or the processes. |

Enable or disable the **Show gadgets for Business Data** option

| Select... | To... |
|---------------------------------------|--|
| Show gadgets for Business Data | when a gadget URL is defined while creating the task type in Designer, selecting this option replaces the existing open CAF portlet with the gadget. If the gadget URL is undefined, gadget will not appear on selecting this option. Only Task business Data and Task Summary gadgets would have this option. |

Configuring Work Stream

Only users with administrator privileges can use the **Administer Business Console** menu option to configure Work Stream. Specify the following fields:

| Field | Specifies... |
|----------------------------------|--|
| Show Case Project Name | Whether to display the project name along with the case type name on Work Stream. |
| Show Process Project Name | Whether to display the project name along with the process type name on Work Stream. |
| Show Task Project Name | Whether to display the project name along with the task type name on Work Stream. |

Configuring AppSpace Settings

Only users with administrator privileges can configure the AppSpace settings.

In the administration menu, select the **Administer Business Console** option, and specify the settings for the following fields:

| Field | Description |
|---|--|
| Maximum gadgets allowed per AppSpace | Specify a numeric value for the maximum number of gadgets allowed in an AppSpace. The default value is 15. |
| Landing Page | Reset the landing page of users, groups, and roles. For more information about resetting the landing page, see “Resetting the Landing Page” on page 30 . |
| Show the AppSpace menu on the masthead | Select to access the AppSpace options from the masthead. |

Resetting the Landing Page

Only users with administrator privileges can use the **Administer Business Console** menu option to reset the landing page of a user.

To reset the landing page

1. Select **Administer Business Console** menu option from the administration menu.
2. Click **Reset** button in the **Landing Page** field.
The Landing Page window appears.
3. Do one of the following:
 - Select **Users, Groups, or Roles** to view landing pages based on user names, groups, or roles.
 - Select **AppSpace Alias** to view landing pages based on AppSpace aliases.
4. Select the landing pages to reset.
5. Click **Apply**.

Configuring the Analytical Engine for Business Console

Only users with administrator privileges can configure the analytical engine settings. For more information about using analytics, see *Working with Business Process Dashboards*.

In the administration menu, select the **Administer Business Console** option, and specify the settings for the following fields:

| Field | Specify... |
|--|--|
| Analytical Engine URL | URL of the analytical engine that Business Console must connect to. Ensure that you have configured the analytical engine with My webMethods Server. |
| Analytical Engine Username | User name for accessing the analytical engine. |
| Analytical Engine User Password | Password for accessing the analytical engine. |

Setting the Maximum Number of Columns in Work Stream

Only users with administrator privileges can use the **Administer Business Console** menu option to set the maximum number of columns.

You can specify the maximum number of columns allowed for a case list, process list, and task list in **Work Stream**. Specify the following fields:

| Field | Specify... |
|--------------------------------|--|
| Maximum task columns | A numeric value for the maximum number of columns allowed in a task list. The minimum value is two, and the default value is six. |
| Maximum process columns | A numeric value for the maximum number of columns allowed in a process list. The minimum value is two, and the default value is six. |
| Maximum case columns | A numeric value for the maximum number of columns allowed in a case list. The minimum value is two, and the default value is six. |

You can use the **Configure Columns** setting to select columns for display in a case list, process list, or task list.

Setting the Maximum Number of Legends in a Chart

Only users with administrator privileges can use the **Administer Business Console** menu option to set the maximum number of legends in a chart.

Specify the maximum number of legends allowed for a **Chart**.

| Field | Specify... |
|-----------------------------|---|
| Maximum Legend Limit | A numeric value for the maximum number of legends allowed in a chart. If the number of legends is more than this numeric limit, none of legends appear on the chart. The minimum value is zero. There is no maximum limit. The default value is five. |

Setting the People Picker Preferences

Only users with administrator privileges can use the **Administer Business Console** menu option to set the preferences for the **People Picker** gadget.

Configure the preferences for **People Picker**. Specify a value for the following fields:

| Field | Specify... |
|---|---|
| Disable Classic View | Select to revert to the new UI layout. |
| No. of users to display per page | A numeric value that limits the maximum number of users listed on a page. |

Configuring HPSTRA Settings

Only users with administrator privileges can configure HPSTRA settings.

In the administration menu, select the **Administer Business Console** menu option, and select **Enable HPSTRA Search**.

| Field | Description |
|-----------------------------|---|
| Enable HPSTRA Search | Select to perform free text search in task list management, Task Inbox, and instance list management. |

Configuring the Session Timeout Settings

Only users with administrator privileges can configure the **Session Timeout** settings.

These settings are used for logging off an inactive user from Business Console. You can set a time duration to wait before Business Console automatically logs off an inactive user.

To set the time duration to wait

1. In the administration menu, select the **Administer Business Console** option, and select **Enable Session Timeout**.
2. Type the time duration to wait in the **Session Timeout** field.

We recommend you to set the same time duration in both Business Console and My webMethods Server so that the session timeout settings are synchronized.

3. Click **Save**.

Configuring the REST Service Timeout Settings

Only users with administrator privileges can configure the **REST Service Timeout** settings.

This setting is used to determine the timeout duration for a REST call.

To set the time duration to wait



1. In the administration menu, select the **Administer Business Console** option, and select **Enable REST Service Timeout**.
2. Type the time duration to wait in the **REST Service Timeout** field.

Ensure that the **Enable REST Service Timeout** value is less than the **Enable Session Timeout** value.

3. Click **Save**.

Enabling Inbox Set Status Action

Only users with administrator privileges can select **Enable Inbox Set Status Action**. By default, **Enable Inbox Set Status Action** is selected. For more information on **Set Status** action, see [“Task Actions” on page 111](#).

If you clear the **Enable Inbox Set Status Action** check box, then for a single task instance, the **Complete** option is available under **SetStatus** action from . Also, **SetStatus** action is not available from the **Actions** menu. For multiple task instances, only the **Complete** option is available under **SetStatus** action from .

Managing Task Types Using My webMethods


Only users with administrator privileges can use the **Administer Tasks** menu option in Business Console's administration menu to manage, modify, and delete task types using the Task Engine Administration page in My webMethods.

For information about administering task types, see *webMethods Task Engine User's Guide*.

Creating and Deploying a Task Type with the Task Business Data Gadget

To view the gadgets associated with the Task Business Data gadget you need to enable the **Show Gadgets with Business Data** option in the Task Business Data gadget. On enabling this option, the CAF gadget is replaced by the Task Business Data gadget. The Task Business Data and Task Summary gadgets have the capability to display the task business data.

To view the gadgets associated with the Task Business Data gadget

1. Login in to Business Console.
2. Navigate to the appropriate AppSpace.
3. Add the Task Business Data gadget into the AppSpace.
4. Click the  icon on the task business data gadget and click **Gadget Settings**.

The **Task Business Data Settings** dialog box appears.

5. In the **Task Business Data Settings** dialog box, enable the **Show gadgets for business data** option.

The Task Summary gadget also has the **Show gadgets for business data** option.

Enabling this option in the gadget displays the gadgets associated with the Task Summary gadget.

Customizing Business Console

You can customize the Business Console user interface as per your business requirement. Any Business Console user can customize the color theme, but only a user with administration privileges can customize logo, masthead, title, tab labels, landing page, task instance panels, gadgets, process details, and task details.

| To customize... | Perform these steps... |
|------------------|---|
| Logo | <ol style="list-style-type: none">1. Select the Customize Business Console menu option from the administration menu.2. Select Logo from the menu options on the Customize Business Console page.3. Click Select Logo to upload the logo. The size of the image must be 140 X 40 pixels and the image file can be in .JPG or .PNG format. The image you upload is displayed on the top left corner of the Business Console masthead.4. Click Reset to Default, if you want to retain the default logo. |
| Masthead Color | <ol style="list-style-type: none">1. Select the Customize Business Console menu option from the administration menu.2. Select Masthead Color from the menu options on the Customize Business Console page.3. Use the color pickers to select the colors for masthead elements.4. Click Preview to view the changes.5. Click Reset to Defaults, if you want to retain the default colors.6. Click Apply to apply the new colors to the masthead. |
| Title and Labels | <ol style="list-style-type: none">1. Select the Customize Business Console menu option from the administration menu.2. Select Title and Labels from the menu options on the Customize Business Console page.3. Edit the titles and labels as per your requirement. Type the new title in the text field. Maximum length of title and labels is 50 characters.4. Click Reset to Defaults, if you want to retain the default title.5. Click Apply to use the new title. |
| Color Theme | <ol style="list-style-type: none">1. Select the Customize Business Console menu option from the administration menu.2. Select Color Theme from the menu options on the Customize Business Console page. |

| To customize... | Perform these steps... |
|---------------------|---|
| | <ol style="list-style-type: none"> 3. Select a theme and click Apply to apply the new theme to the masthead. |
| Gadgets | <ol style="list-style-type: none"> 1. Select the Customize Business Console menu option from the administration menu. 2. Select Gadgets from the menu options on the Customize Business Console page. 3. Select the color for gadget elements. 4. Click Apply to apply the new colors to all the gadgets used in Business Console. |
| Landing page | <ol style="list-style-type: none"> 1. Select the Customize Business Console menu option from the administration menu. 2. Select Landing Page from the menu options on the Customize Business Console page. 3. In the Default Landing Page drop-down list, select the page you want to make as the landing page. When you first login to Business Console, the Home page is the default landing page. The URL in the Default Landing Page URL field is set to the landing page you specify. To reset the landing page to Home page, click Clear next to the Default Landing Page URL field. 4. Click Apply to save the changes specified for the landing page. |
| Analytics dashboard | <ol style="list-style-type: none"> 1. Select the Customize Business Console menu option from the administration menu. 2. Select Analytics from the menu options on the Customize Business Console page. 3. Select Enable Custom Dashboard if you want to view custom dashboard in addition to the default dashboard for processes in the Analytics tab. 4. Click Apply to save the changes. |

Customizing Business Console Using Gadgets

Gadgets are re-usable components for customizing your business monitoring views. You can customize AppSpaces, landing page, process details page, and task details page in Business Console by using:

- Built-in gadgets
- Customized gadgets created in Software AG Designer and deployed to My webMethods Server

Built-in gadgets retrieve data from the same servers configured with Business Console, whereas the user-created or customized gadgets created in Designer can be configured to use different servers. Both built-in gadgets and user-created gadgets can be customized further by configuring the settings of individual gadgets. For each gadget you need to use in Business Console, the access permission for that gadget must be set for you in My webMethods Server.

Note: When you design your own gadget using Designer, make sure the views and actions of the gadget function within a Business Console AppSpace.

| For... | See... |
|--|--|
| Creating new AppSpaces using gadgets | “Creating Business Console AppSpaces Using Gadgets” on page 38 |
| Editing AppSpaces | “Editing AppSpace Using Gadgets” on page 39 |
| Customizing gadgets | “Customizing Business Console” on page 34 |
| Managing AppSpace groups | “Managing AppSpace Groups” on page 81 |
| Customizing process details page using gadgets | “Customizing Process Details Using Gadgets” on page 81 |
| Customizing start task page using gadgets | “Customizing Start Task Page using Gadgets” on page 81 |
| Customizing task details page using gadgets | “Customizing Task Details Using Gadgets” on page 82 |

| For... | See... |
|---|---|
| Creating gadgets using Software AG Designer | <i>webMethods CAF and OpenUI Development Help</i> |
| Assigning gadget permissions | “Assigning Gadget Access Permissions” on page 82 |
| Assigning AppSpace permissions | “Assigning AppSpace and AppSpace Group Access Permissions” on page 82 |

Creating Business Console AppSpaces Using Gadgets


Use built-in gadgets or the gadgets created in Designer to create AppSpaces. You can group AppSpaces, and share an AppSpace group with other users.

By default, Business Console provides these example AppSpaces:


- My Inbox Demo - This AppSpace provides the same functionality of **My Inbox**.
- WHN Demo - This AppSpace provides the same functionality of the **What’s Happening Now** tab.

In the **AppSpace** tab, use the procedure below to create customized AppSpaces.

To create a new AppSpace

1. In the **AppSpace** tab, click .

The New AppSpace Configuration dialog appears.
2. Specify the **Title**, **Group Name**, **Internal type**, and **Alias** for the AppSpace.

To select a different language or locale and provide a title, click . Only administrators can view and use AppSpaces of internal type, and they do not appear in the **AppSpace** tab. Alias is used to view an AppSpace in a web browser. For more information about viewing an AppSpace in a web browser, see [“Viewing an AppSpace in a Web Browser” on page 40](#).
3. Select the type of view. The available options are **Desktop** and **Mobile**.
4. Specify the layout for the AppSpace. You can use any of the existing layouts or create a new layout. To create a new layout, do the following:
 - a. Click **Create Custom Layout**.


The Layout Designer dialog appears.
 - b. Click **Add Container** to add containers.

- c. Drag the containers to create a custom layout for the AppSpace. You can also resize the containers.
 - d. Click **Save and Apply**.
 - e. Specify a name for the custom layout, and then click **Save**.
5. Click **Save** in the AppSpace Configuration dialog.
 6. Click **Add Gadget** in each container and select the gadgets listed in the Add New Gadget dialog.
 7. Configure each gadget in the AppSpace, see [“Editing AppSpace Using Gadgets” on page 39](#).
 8. To modify the AppSpace, click **Configure**.
 9. Click **Save** to save the new AppSpace.


Editing AppSpace Using Gadgets

Use the procedure below to edit an existing AppSpace.

To edit an AppSpace

1. In the **AppSpace** tab, select the AppSpace you want to edit.
2. Click  and select **Edit AppSpace**.
3. Edit the AppSpace and configure the gadgets.
 - To add gadgets to the AppSpace, click **Add Gadget** in each container.







The Add New Gadget dialog displays the gadget categories on the left panel, and lists the gadgets of the selected category on the right panel. Additionally, information about a gadget appears on the dialog when you select the gadget.
 - Click **Expand/Collapse**, if you want to expand or collapse all gadgets in the AppSpace.

The names of all gadgets included in the AppSpace are displayed when gadgets are collapsed. This action enables you to view all gadgets in the AppSpace without having to scroll down to the end of the page.
 - To modify the AppSpace, click **Configure**.
 - To configure each gadget in the AppSpace, click  corresponding to the gadget.
 - Select **Gadget Settings** to specify the gadget settings.

For configuring a user-created gadget, the parameters available for configuration depends on the design of each gadget.
 - Select **Server Settings** to specify from which server the user-created gadget should retrieve data. A user-created gadget can be configured to connect to:

- My webMethods Server
- Integration Server
- AgileApps Cloud
- Other SAML 2.0 authenticated server

This option is not available for built-in gadgets. All built-in gadgets use the same server settings as configured for Business Console. You cannot change the server configuration for individual built-in gadgets.

- To remove a gadget, click  corresponding to the gadget.
4. Click  and select **Set as Landing Page**, if you want to set the AppSpace as the landing page for Business Console.
 5. Click  and select **Set as Landing Page for Specific Users**, if you want to set the AppSpace as the landing page for specific Business Console users.
 6. Click  and select **Delete AppSpace**, if you want to remove the AppSpace.
 7. Click  and select **Clone AppSpace**, if you want to clone the AppSpace. Cloning creates a new AppSpace with the same layout and gadgets as in the existing AppSpace.
 8. Click  and select **Export AppSpace**, if you want to export the AppSpace. For more information, see [“Exporting an AppSpace As an .xml File” on page 41](#).

Viewing an AppSpace in a Web Browser

You can directly view an AppSpace in a web browser if the AppSpace has an alias. You can specify an alias for an AppSpace when creating it. For more information about the alias, see [“Creating Business Console AppSpaces Using Gadgets” on page 38](#). You can view an AppSpace in a web browser to test the AppSpace after creating it.

To view an AppSpace in a web browser

1. Identify the alias of the appSpace that you want to view in the web browser.
2. Open an instance of a web browser and specify the URL in the following format:

```
http://host:port/business.console.gadgets#/appspace/AppSpaceAlias
```

where:

- *host* is the host name of My webMethods Server.
- *port* is the port number used by My webMethods Server.
- *AppSpaceAlias* is the alias name of the AppSpace.

Viewing Standalone AppSpaces

You can view the AppSpace tab in webMethods Business Console as an individual standalone application using the following URL:

```
http://localhost:8585/appspaces
```

Exporting an AppSpace As a .cdp File

You can export an AppSpace as a .cdp format file. After exporting, you can import an AppSpace to a My webMethods Server instance. Importing an AppSpace enables you to access the AppSpace from other Business Console applications. For information about importing an AppSpace, see [“Importing an AppSpace” on page 42](#).

To export an AppSpace

1. As system administrator, log on to My webMethods Server.
2. Navigate to **Folders > Administrative Folders > Administration Dashboard > Migration > Content Import/Export**.
3. In the **Migration Source Type** field, select **Single Object**.
4. In the **Migration Mode** field, select **Export**, and then click **Next**.
5. In the **Export Name** field, type a name for the export file.
6. In the **Item to export** field, click **Browse**.
The Browse dialog box appears.
7. Navigate to **Folders > Custom Applications > Business Console Dashboard Container**.
8. Select an AppSpace to export, and then click **Select**.
9. Select the following components to export:
 - **Create Auto Deployable Component**
 - **Export Access Control Lists**
 - **Export User Scoped Preferences**
10. Click **Next**.

A file download dialog appears for downloading the `wm_exportName.cdp` file, where `exportName` is the name specified in the **Export Name** field.


Exporting an AppSpace As an .xml File

Only users with administrator privileges can export an AppSpace.

You can export an AppSpace as an `.xml` format file. After exporting, you can import an AppSpace to a My webMethods Server instance. Importing an AppSpace enables you to access the AppSpace from other Business Console applications.

When you import an Appspace, the group associations of the Appspace are also imported.

To export an AppSpace

1. In the **Appspace** tab, select the AppSpace you want to export.
2. Click  and select **Export AppSpace**. An `.xml` file is generated and downloaded automatically.

Note: You can import an `.xml` file into Business Console by deploying the xml file on My webMethods Server. See *Administering My webMethods Server* for more information. The Appspace gets deployed on My webMethods Server and is available on Business Console. The same `.xml` file can be imported by deploying to My webMethods Server.

Importing an AppSpace

You can import an AppSpace to an instance of My webMethods Server. This action enables you to access AppSpaces from other Business Console applications. For information about exporting an AppSpace, see [“Exporting an AppSpace As a `.cdp` File” on page 41](#).

You can import an AppSpace in one of the following ways:

- Deploying an AppSpace using the File System. See [“Deploying an AppSpace using the File System” on page 42](#).
- Deploying an AppSpace using the Install Option. See [“Deploying an AppSpace using the Install Option” on page 43](#).
- Using the **Content Import/Export** option in My webMethods Server. See [“Importing an AppSpace to My webMethods Server ” on page 43](#).

Deploying an AppSpace using the File System

You can use the file system and deploy an AppSpace to an instance of My webMethods Server.

To deploy an AppSpace using the file system

1. Enable the Auto Deploy role for automatic deployment of portlets. For more information about the Auto Deploy role, see the *Administering My webMethods Server* guide.

2. Copy the .cdp file of the AppSpace to the *Software AG_directory \MWS\server \serverName \deploy* directory. For more information about how to export an AppSpace as a .cdp file, see [“Exporting an AppSpace As a .cdp File” on page 41](#).

Deploying an AppSpace using the Install Option

You can use the install option and deploy an AppSpace to an instance of My webMethods Server.

To deploy an AppSpace using the installation UI

1. As system administrator, log on to My webMethods Server.
2. Navigate to **Folders > Administrative Folders > Administration Dashboard > Configuration > Install Administration**.
3. Click **Install New Component**.
4. Click **Choose File** and select the .cdp file of the AppSpace.
For more information about how to export an AppSpace as a .cdp file, see [“Exporting an AppSpace As a .cdp File” on page 41](#).
5. Click **Next**, and then click **Install**.

Importing an AppSpace to My webMethods Server

You can import an AppSpace to an instance of My webMethods Server.

To import an AppSpace

1. As system administrator, log on to My webMethods Server.
2. Navigate to **Folders > Administrative Folders > Administration Dashboard > Migration > Content Import/Export**.
3. In the **Migration Source Type** field, select **Single Object**.
4. In the **Migration Mode** field, select **Import**, and then click **Next**.
5. In the **Install Destination** field, click **Browse**.
The Browse dialog box appears.
6. Navigate to **Folders > Custom Applications**.
7. Select **Business Console Dashboard Container**, and then click **Select**.
8. In the **Install Component** field, click **Choose File**, and then select the .cdp file of the AppSpace.
For more information about how to export an AppSpace as a .cdp file, see [“Exporting an AppSpace As a .cdp File” on page 41](#).
9. Click **Next**.

Understanding Built-in Gadgets

You can use built-in gadgets to customize AppSpaces in Business Console.

You can view built-in gadgets in the Add New Gadget dialog box. The Add New Gadget dialog box displays built-in gadgets in the following categories:

- **Business Console - Common.** These built-in gadgets are for all instance types such as processes, tasks, and cases.
 - Global Activity Stream
 - Attachments
 - Instance List Management
 - People Picker
 - Work Stream
 - MashZone NextGen

See [“Common Gadgets” on page 45](#).

- **Business Console - Case.** These built-in gadgets are for cases.
 - Case Activity
 - Case Business Data
 - Case Comments
 - Case Details Header
 - Case Lookup
 - Workflow and Activity Status
 - Case Summary
 - Case Task Business Data
 - Case Task Details Header
 - Case Task Summary
 - Case Workflows
 - Create Instance
 - Hours Logged
 - Workflow Diagram

See [“Case Related Gadgets” on page 56](#).

- **Business Console - Processes.** These built-in gadgets are for processes.
 - Callable Processes

- Process Comments
- Process Header
- Process Diagram
- Process Summary
- Process Tasks
- Process Timeline Diagram

See [“Process Related Gadgets”](#) on page 62.

- **Business Console - Tasks.** These built-in gadgets are for tasks.
 - Task Charts
 - Task Inbox
 - Task Audit
 - Task Business Data
 - Task Comments
 - Task Experts
 - Task Header
 - Task Summary
 - Task Calendar

See [“Task Related Gadgets ”](#) on page 67.

- **Gadget Samples.** To access gadget samples, the system administrator for My webMethods Server must install the gadget samples. For installation instructions, see [“Installing Sample Gadgets”](#) on page 83.

Important: Gadget samples are not certified and Software AG does not provide support for gadget samples.

You can use the gadget settings, server settings, and events to configure a built-in gadget. Certain gadgets produce one or more events as a result of a user action or a change. Additionally, a gadget can subscribe to events produced by other gadgets to trigger an action. For example code that demonstrates how to configure events, see [“Code Samples”](#) on page 79. For more information about gadgets, see the *Developing Gadgets for webMethods Business Console Guide*.

Common Gadgets

Global Activity Stream

Displays information related to activities such as adding attachments or comments received from users.


Produced Event

TASK_TYPE_PERMISSION_LOADED_FOR_TASK_ACTION

Following are the output parameters in the payload (payload.<parameter>):

| Parameter | Description |
|-------------|---|
| taskTypeId | Task type ID |
| taskId | Task ID |
| status | Task status |
| name | Task name |
| source | Gadget name |
| isDelegated | Task is delegated if the value is true. Otherwise, it is false. |

Description

Retrieves user permissions for task instances after clicking the  icon.

TASK_ASSIGN_TO_USER

Following is the output parameter in the payload (payload.<parameter>):

| Parameter | Description |
|-----------|-------------|
| taskId | Task ID |

Triggered when you perform the Assign To task action.

ACCEPT_TASK_SUCCESSFUL

Following is the output parameter in the payload (payload.<parameter>):

| Parameter | Description |
|-----------|-------------|
| taskId | Task ID |

Triggered when you perform the Accept task action.

Produced Event

ACCEPT_FOR_TASK_SUCCESSFUL

Following is the output parameter in the payload (payload.<parameter>):

| Parameter | Description |
|-----------|-------------|
| taskId | Task ID |

Description

Triggered when you perform the Accept For task action.

BASIC_DELEGATE_SUCCESSFUL

Following is the output parameter in the payload (payload.<parameter>):

| Parameter | Description |
|--------------|---------------------------------|
| taskId | Task ID |
| targetUserID | Delegated user IDs in a list |
| responseJSON | Success message from the server |

Triggered when you perform the Delegate task action.

TASK_REMOVE_DELEGATION_SUCCESSFUL

Following is the output parameter in the payload (payload.<parameter>):

| Parameter | Description |
|-----------|-------------|
| taskId | Task ID |

Triggered when you perform the Remove Delegations task action.

Subscribed Event

COLLABORATION_TASK_CREATED

Description

Updates the activity information after creating an instant task or a collaboration task.

Attachments

Displays attachments for an instance type based on the gadget setting. Additionally, you can download, upload, and delete attachments.

| Gadget Setting | Description |
|--------------------|---|
| Type | Type of instance. You can select one of the following instance types: <ul style="list-style-type: none"> ■ Activity ■ Process ■ Task ■ Case |
| Instance ID | The Instance ID of a process, task, or case. |
| Case Type | The case type associated with a case instance. This option appears only for case instances. |

| Subscribed Event | Description | | | | |
|---|---|-------------|------------|---------------------|--|
| PROCESS_DETAILS_DASHBOARD_LOADED Following is the input parameter in the payload (payload.<parameter>): <table border="1" data-bbox="230 1428 925 1575"> <thead> <tr> <th>Parameter</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>instanceId</td> <td>Process Instance ID</td> </tr> </tbody> </table> | Parameter | Description | instanceId | Process Instance ID | Retrieves the process for which attachments must be displayed. |
| Parameter | Description | | | | |
| instanceId | Process Instance ID | | | | |
| TASK_DETAILS_DASHBOARD_LOADED Following are the input parameters in the payload (payload.<parameter>): | Retrieves the task for which attachments must be displayed. | | | | |

| Subscribed Event | | Description |
|-----------------------------------|---|---|
| Parameter | Description | |
| instanceId | Task ID | |
| type | Set the value to <code>tlm</code> to display attachments associated with tasks. | |
| CASE_DETAILS_DASHBOARD_LOADED | | Retrieves the case for which attachments must be displayed. |
| ACTIVITY_DETAILS_DASHBOARD_LOADED | | Retrieves the activities for which attachments must be displayed. |

Instance List Management

Displays a process list, task list, or case list based on the gadget setting.

| Gadget Setting | Description |
|-----------------------|---|
| Type | Type of instance. Select one of the following instance types: <ul style="list-style-type: none"> ■ Process ■ Task ■ Case |
| Name | Name of the process type, task type, or case type. |
| Gadget label | The title of the gadget. |
| Show instance details | Displays process instances, task instances, or case instances. |

Gadget Setting**Description**

Following gadget settings are applicable only to tasks:

Custom task name

The custom title to use for the **Task Name** column.

Select a saved search

Select a saved search criteria for retrieving tasks.

Show only my tasks

Displays tasks that are associated with the current user.

Show completed tasks

Displays tasks that are complete.

Produced Event**Description**

UPDATE_INBOX_TASK_LIST

Following are the output parameters in the payload (payload.<parameter>):

Updates the task instances in the task inbox.

| Parameter | Description |
|------------|---|
| pageNumber | The updated page number in the task inbox |
| pageSize | The updated page size in the task inbox |

AA_OBJECT_RECORD_CHANGE

Following are the output parameters in the payload (payload.<parameter>):

Triggered when a case instance is selected.

| Parameter | Description |
|------------|--------------|
| AAObjectID | Case type ID |

Produced Event**Description**

| | |
|------------------|------------------|
| AAObjectRecordID | Case Instance ID |
|------------------|------------------|

SAVED_SEARCH_DELETE_CHART_REFRESH

Following is the output parameter in the payload (payload.<parameter>):

Triggered when a saved search query is deleted.

| Parameter | Description |
|---------------|-------------------|
| savedSearchID | Saved search name |

TASK_ASSIGN_TO_USER

Following is the output parameter in the payload (payload.<parameter>):

Triggered when you perform the Assign To task action.

| Parameter | Description |
|-----------|-------------|
| taskId | Task ID |

ACCEPT_TASK_SUCCESSFUL

Following is the output parameter in the payload (payload.<parameter>):

Triggered when you perform the Accept task action.

| Parameter | Description |
|-----------|-------------|
| taskId | Task ID |

ACCEPT_FOR_TASK_SUCCESSFUL

Following is the output parameter in the payload (payload.<parameter>):

Triggered when you perform the Accept For task action.

| Parameter | Description |
|-----------|-------------|
| taskId | Task ID |

Produced Event

BASIC_DELEGATE_SUCCESSFUL

Following is the output parameter in the payload (payload.<parameter>):

| Parameter | Description |
|--------------|---------------------------------|
| taskId | Task ID |
| targetUserID | Delegated user IDs in a list |
| responseJSON | Success message from the server |

Description

Triggered when you perform the Delegate task action.

TASK_REMOVE_DELEGATION_SUCCESSFUL

Following is the output parameter in the payload (payload.<parameter>):

| Parameter | Description |
|-----------|-------------|
| taskId | Task ID |

Triggered when you perform the Remove Delegations task action.

Subscribed Event

COLLABORATION_TASK_CREATED

Following is the input parameter in the payload (payload.<parameter>):

| Parameter | Description |
|-----------|----------------------------|
| taskId | Task ID of the parent task |

Description

Updates the list after creating an instant task or a collaboration task.

People Picker

Displays users listed in the active directory that is configured on My webMethods Server.

Gadget Setting

Maximum users to display per page**Description**

The maximum number of users to display on a page.

Work Stream

Displays a list of process types, task types, and case types. This gadget enables you to customize the following pages: Process Details, Task Details, and Case Details.

Subscribed Event

GLOBAL_PERMISSION_LOADED

Description

Updates the user interface based on user permissions.

REFRESH_PLM_GADGET_ON_CLOSE

Updates the process list.

Following is the input parameter in the payload (payload.<parameter>):

| Parameter | Description |
|-----------|--|
| pKey | Parameter to identify the process type. For example, the payload.pKey for the Hire (HR) process has the following format: HR/Hire |

MashZone NextGen

Displays the MashZone NextGen data on Business Console as a gadget. For more information, see [“MashZone NextGen Gadgets” on page 55](#).

Gadget Setting

Dashboard URL**Description**

The URL of the MashZone NextGen instance.

Gadget Setting**UI Settings**

Specify the following:

| Parameter | Description |
|--------------|---|
| Height in px | Height of the gadget frame. |
| Gadget Title | A unique title for the gadget. |
| Show Border | Select to display a border for the MashZone NextGen gadget. |

Data Mappings

Provide the following mapping details:

| Parameter | Description |
|------------------|--|
| Mapping ID | A unique string representing the common entity in two different data sets. |
| Widget ID | The Widget ID details of the MashZone NextGen data set that is obtained from the MashZone NextGen Dashboard instance. |
| Widget Parameter | The parameter that needs to be mapped between the two communicating MashZone NextGen gadgets. |

Description

Custom settings for the gadget on Business Console.

The settings to map the data set with another MashZone NextGen gadget having a different **Dashboard URL**.

| Gadget Setting | Description |
|----------------|--|
| Default Value | Assign a default parameter value through which the communication is visible on Business Console. |

MashZone NextGen Gadgets

One or more Business Console instances can recognize a MashZone NextGen instance as an authentic source of information. This two-way communication takes place using SAML authentication. A MashZone NextGen gadget that is created in Business Console renders the information from a MashZone NextGen instance.


Additionally, two or more MashZone NextGen gadgets can communicate with each other on Business Console provided they have a common entity in the data set. For example, if there are two disparate data sets such as (city, average age of people) and (city, average income of people) with one or more common entities such as the city name, then these two data sets can be mapped and configured to communicate with each other based on the city entity in both. The data mapping of a gadget is done by identifying the data mapping parameters in a MashZone NextGen chart. Although these data sets have different representations such as a pie chart or a data grid and so on in the MashZone NextGen instance, they can seamlessly communicate with each other on Business Console.

You need to configure the host and the port numbers of Business Console in the content security policy file in the MashZone NextGen installation. See the *MashZone NextGen User and Developer Guide* for steps to perform this configuration task.

Configuring Communication Among MashZone NextGen Gadgets



Two or more MashZone NextGen gadgets can communicate with each other in Business Console provided they have a common entity in their data sets.

To configure a MashZone NextGen gadget to communicate with another

1. Click  icon on the MashZone NextGen gadget.
The **MZNG Settings** dialog box appears.
2. In **MZNG Settings** dialog box, provide a **Dashboard URL** that corresponds to the MashZone NextGen instance that you want the gadget to communicate with.
3. Under **Data Mappings**, provide the following details:

| Field | Specify... |
|-------------------------|---|
| Mapping ID | Provide a unique name for the mapping task. |
| Widget ID | Provide the Widget ID value. |
| Widget Parameter | Provide the Widget Parameter value. |
| Default Value | Provide an optional default value from the data set that you want to highlight by default on loading the MashZone NextGen gadget in Business Console. The default value or the selection gets overridden based on selections on other MashZone NextGen gadgets. Therefore, the default value might not be applicable if two or more communication-enabled MashZone NextGen gadgets are placed on the same AppSpace. |

For instructions to identify the data mapping parameters, see the *MashZone NextGen User and Developer Guide*.

- You can add multiple data entities in a data set to filter specific sets of data from a large data set. Click   to add and delete a data mapping condition.

After configuring a MashZone NextGen gadget to communicate with another, you can select a data entity in one MashZone NextGen gadget to highlight the corresponding entity in the other.

Case Related Gadgets

Case Activity

Displays a list of activities associated with a case instance.

| Gadget Setting | Description |
|-------------------------|------------------------------|
| Case Type ID | The type of case. |
| Case Instance ID | The Instance ID of the case. |

Case Business Data

Displays the business data or summary or both for a case instance.

| Gadget Setting | Description |
|---------------------------|--|
| Case Type ID | The type of case. |
| Case Instance ID | The Instance ID of the case for which the information must be retrieved. |
| Show Business Data | Displays the business data of a case instance in the Business Data tab. |
| Show Case Summary | Displays the case details in the Summary tab. |

Case Comments

Displays comments for a case or an activity associated with a case.

| Gadget Setting | Description |
|-------------------------|--|
| Type | Specify whether you want to view comments for a case or activity. |
| Case Instance ID | The Instance ID of the case for which the information must be retrieved. |
| Activity ID | The ID of the activity associated with a case. The field appears when you select Activity in the Type field. |

| Subscribed Event | Description |
|-----------------------------------|-------------------------------------|
| ACTIVITY_DETAILS_DASHBOARD_LOADED | Loads the comments for an activity. |

Case Details Header

Displays the header of a case. The header contains the case ID, actions, status, and duration.

| Gadget Setting | Description |
|-----------------------|--------------------|
| Case Type ID | The type of case. |

| Gadget Setting | Description |
|----------------|-------------|
|----------------|-------------|

| | |
|------------------|------------------------------|
| Case Instance ID | The Instance ID of the case. |
|------------------|------------------------------|

| Produced Event | Description |
|----------------|-------------|
|----------------|-------------|

| | |
|-----------------------|--|
| CASE_INSTANCE_DELETED | |
|-----------------------|--|

Following are the input parameters in the payload (payload.<parameter>):

| |
|--|
| Triggered when a case instance is deleted. |
|--|

| Parameter | Description |
|----------------|-------------------|
| caseInstanceId | Case Instance ID. |

Case Lookup

Search for case related objects such as users, accounts, and other objects.

| Subscribed Event | Description |
|------------------|-------------|
|------------------|-------------|

| | |
|--------------------|--|
| LOOKUP_CASE_OBJECT | |
|--------------------|--|

Following are the input parameters in the payload (payload.<parameter>):

| |
|-----------------------------------|
| Used for searching a case object. |
|-----------------------------------|

| Parameter | Description |
|-------------|---|
| contactType | Type of object to search. For example, user, account, owner, or any other object. |
| fieldId | (optional) A unique ID of the field to update. |
| lookupText | (optional) The text or keyword to use for searching. |
| pageNumber | (optional) The page number to search. |

| Subscribed Event | Description |
|------------------|--|
| pageSize | (optional) The maximum number of search results. |

| Produced Event | Description |
|---|--|
| CASE_OBJECT_SELECTED | Triggered to send the details of the selected case object from the gadget. |
| Following are the output parameters in the payload (payload.<parameter>): | |

| Parameter | Description |
|-----------|-------------------------------------|
| name | The name of the selected object. |
| meta | Metadata about the selected object. |

Workflow and Activity Status

Displays the status of a case and its activities.

| Gadget Setting | Description |
|------------------|------------------------------|
| Case Type ID | The type of case. |
| Case Instance ID | The Instance ID of the case. |

Case Summary

Displays the summary of a case instance.

| Gadget Setting | Description |
|------------------|------------------------------|
| Type | The type of case. |
| Case Instance ID | The Instance ID of the case. |

Case Task Business Data

Displays the business data of an activity associated with a case.

| Gadget Setting | Description |
|-------------------------|---|
| Case Type ID | The type of case. |
| Case Instance ID | The Instance ID of the case. |
| Activity ID | The Instance ID of the activity associated with a case. |

| Subscribed Event | Description |
|-----------------------------------|--|
| ACTIVITY_DETAILS_DASHBOARD_LOADED | Loads the business data of an activity associated with a case. |

Case Task Details Header

Displays the header for an activity associated with a case. The header contains the Activity ID, actions, status, and priority.

| Gadget Setting | Description |
|-------------------------|---|
| Case Type ID | The type of case. |
| Case Instance ID | The Instance ID of the case. |
| Activity ID | The Instance ID of the activity associated with a case. |

| Produced Event | Description |
|-----------------------|--|
| CASE_INSTANCE_DELETED | Triggered when an activity is deleted. |

Following is the output parameter in the payload (payload.<parameter>):

| Produced Event | | Description |
|----------------|----------------------|-------------|
| Parameter | | Description |
| caseInstanceID | Activity Instance ID | |

| Subscribed Event | Description |
|-----------------------------------|---|
| ACTIVITY_DETAILS_DASHBOARD_LOADED | Loads the header of an activity associated with a case. |

Case Task Summary

Displays the summary of an activity associated with a case.

| Gadget Setting | Description |
|------------------|---|
| Case Type ID | The type of case. |
| Case Instance ID | The Instance ID of the case. |
| Activity ID | The Instance ID of the activity associated with a case. |

| Subscribed Event | Description |
|-----------------------------------|--|
| ACTIVITY_DETAILS_DASHBOARD_LOADED | Loads the business data of an activity associated with a case. |

Case Workflows

Displays a list of process instances associated with a case.

| Gadget Setting | Description |
|------------------|------------------------------|
| Case Type ID | The type of case. |
| Case Instance ID | The Instance ID of the case. |

Create Instance

Creates a new case or activity.

| Gadget Setting | Description |
|-------------------------|---|
| Type | Specify whether you want to create a new case or activity. |
| Case Type ID | The type of case. |
| Case Instance ID | The Instance ID of the case in which you can create the activity. The field appears when you select Activity in the Type field. |

Hours Logged

Displays the hours logged for a case.

| Gadget Setting | Description |
|-------------------------|------------------------------|
| Case Type ID | The type of case. |
| Case Instance ID | The Instance ID of the case. |

Workflow Diagram

Displays the process diagram that represents the status of a process associated with a case.

| Gadget Setting | Description |
|-----------------------|--------------------------------|
| Workflow ID | The Instance ID of a workflow. |

Process Related Gadgets**Callable Processes**

Displays all callable processes of a parent process.

Gadget Setting**Instance ID****Description**

The Instance ID of the parent process.

Callable Process Label

The title of the gadget.

Update gadget to display child processes

Displays child processes of a callable process in the gadget.

Subscribed Event

PROCESS_DETAILS_DASHBOARD_LOADED

Following are the input parameters in the payload (payload.<parameter>):

Description

Triggers after loading the process details page. The payload must contain the Instance ID of the parent process.

| Parameter | Description |
|--------------|--|
| instanceId | Process Instance ID |
| callableType | Set the value to process to display associated process instances |

Process Comments

Displays comments related to tasks associated with a process instance. Additionally, you can perform actions such as add comments to a single task or multiple tasks, delete comments, and send emails.

Gadget Setting**Instance ID****Description**

The Instance ID of the process.

Subscribed Event

PROCESS_DETAILS_DASHBOARD_LOADED

Description

Loads the Process Comments gadget.

Subscribed Event**Description**

Following is the input parameter in the payload (`payload.<parameter>`):

| Parameter | Description |
|-------------------------|---------------------|
| <code>instanceId</code> | Process Instance ID |

Process Header

Displays information such as process ID, status, and duration of the process in a header panel. Additionally, you can set the task priority.

Gadget Setting**Description****Instance ID**

The Instance ID of the process.

Subscribed Event**Description**

`PROCESS_DETAILS_DASHBOARD_LOADED`

Following is the input parameter in the payload (`payload.<parameter>`):

Retrieves the information to display for a process.

| Parameter | Description |
|-------------------------|---------------------|
| <code>instanceId</code> | Process Instance ID |

Process Diagram

Displays the process diagram that represents the status.

Gadget Setting**Description****Instance ID**

The Instance ID of the process.

Subscribed Event

PROCESS_DETAILS_DASHBOARD_LOADED

Following is the input parameter in the payload
(payload.<parameter>):

| Parameter | Description |
|------------|---------------------|
| instanceId | Process Instance ID |

Description

Retrieves the Instance ID for a process from the payload and displays the process diagram.

Process Summary

Displays the summary of a process.

Gadget Setting**Instance ID****Description**

The Instance ID of the process.

Summary Tab Label

The name to use for the **Summary** tab.

Diagram Tab Label

The name to use for the **Diagram** tab.

Subscribed Event

PROCESS_DETAILS_DASHBOARD_LOADED

Following is the input parameter in the payload
(payload.<parameter>):

| Parameter | Description |
|------------|---------------------|
| instanceId | Process Instance ID |

Description

Retrieves the Instance ID for a process from the payload and displays the process summary.

Process Tasks

Displays the task instances associated with a process.

Gadget Setting**Instance ID****Description**

The Instance ID of the process.

Tasks Label

The title of the gadget.

Subscribed Event

PROCESS_DETAILS_DASHBOARD_LOADED

Following are the input parameters in the payload (payload.<parameter>):

Description

Retrieves the task instances for a process.

| Parameter | Description |
|------------------|--|
| instanceId | Process Instance ID |
| taskInstanceType | Set the value to process to display task instances associated with the process |

Process Timeline Diagram

Displays the timeline diagram of a process.

Gadget Setting**Instance ID****Description**

The Instance ID of the process.

Subscribed Event

PROCESS_DETAILS_DASHBOARD_LOADED

Following is the input parameter in the payload (payload.<parameter>):

Description

Loads the Process Timeline Diagram gadget

| Subscribed Event | | Description |
|------------------|---------------------|-------------|
| Parameter | Description | |
| instanceId | Process Instance ID | |

Task Related Gadgets

Task Charts

Displays charts for tasks such as bar charts and pie charts.

| Gadget Setting | Description |
|----------------------|---|
| Maximum Legend Limit | Maximum number of legends allowed in a chart. |
| Saved Search | <p>The task filter for chart results. The public and private saved searches that you defined in My webMethods are available for selection.</p> <p>Default is All My Tasks (Standard Task Inbox).</p> |
| Chart Type | <p>The type of chart.</p> <p>The following chart types are available for selection:</p> <ul style="list-style-type: none"> ■ Bar chart ■ Pie chart ■ Donut chart ■ Bubble chart ■ Tree chart <p>Default is Bar chart.</p> |

| Gadget Setting | Description |
|--|---|
| <p>Task Parameter</p> | <p>The task data on which the task charting is based.</p> |
| <p>Group By Task Type</p> | <p>Whether the chart data is grouped by task type.</p> <p>The Group By Task Type option is not available for Pie chart and Donut chart. It is mandatory for Bubble chart and Tree chart.</p> |
| Produced Event | Description |
| <p>UPDATE_CHART_DEFAULT_SAVED_SEARCH</p> | <p>Triggered when running saved search queries.</p> |
| <p>LAUNCH_TASK_CHART_SETTINGS</p> | <p>Displays the Chart Settings dialog box.</p> |
| <p>Task Inbox</p> <p>Displays the task instances in an inbox.</p> | |
| Gadget Setting | Description |
| <p>Inbox</p> | <p>The task inbox. Select My Inbox to view the tasks assigned to you, or select one of the task types.</p> |
| <p>Select Saved Search</p> | <p>A saved search query for retrieving task instances.</p> |
| <p>Filter</p> | <p>Select a task filter. This option appears only when you select My Inbox in the Inbox field.</p> |
| <p>Custom Task Name</p> | <p>A custom title for the Task Name column.</p> |

Gadget Setting**Use Custom Task Name****Description**

Displays the custom title when selected.

Action Menu Orientation

Select a position to display the task actions menu in the gadget. You can either select the **Left** position or the **Right** position.

Subscribed Event

ACCEPT_TASK_SUCCESSFUL

Description

Refreshes the task inbox when a task is accepted.

Task Audit

Displays the audit information for a task.

Gadget Setting**Instance ID****Description**

The Instance ID of the task.

Subscribed Event

TASK_DETAILS_DASHBOARD_LOADED

Following is the input parameter in the payload (payload.<parameter>):

Description

Triggered when the audit information for a task instance is retrieved on the task details page.

| Parameter | Description |
|------------|------------------|
| instanceId | Task Instance ID |

Task Business Data

Displays the business data for a task instance.

| Gadget Setting | Description |
|---------------------------------------|---|
| Instance ID | The Instance ID of the task. |
| Task type name | Name of the task type. |
| Task application name | Name of the application which contains the task. |
| Finish URL (Optional) | URL to return after completing the task. This is an optional field. |
| Show Gadgets for Business Data | Replaces the existing CAF/OpenUI portlet with a gadget. A gadget URL must be defined while creating a task type in Software AG Designer to replace the existing CAF/OpenUI portlet. |

| Subscribed Event | Description | | | | |
|---|---|--------------------|------------|------------------|--|
| TASK_DETAILS_DASHBOARD_LOADED | Triggered when the business data for a task instance is retrieved and displayed on the task details page. | | | | |
| Following is the input parameter in the payload (payload.<parameter>): | | | | | |
| <table border="1"> <thead> <tr> <th>Parameter</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>instanceId</td> <td>Task Instance ID</td> </tr> </tbody> </table> | Parameter | Description | instanceId | Task Instance ID | |
| Parameter | Description | | | | |
| instanceId | Task Instance ID | | | | |

Task Comments

Displays the comments for a task instance.

| Gadget Setting | Description |
|-----------------------|------------------------------|
| Instance ID | The Instance ID of the task. |

Subscribed Event

TASK_DETAILS_DASHBOARD_LOADED

Following is the input parameter in the payload
(payload.<parameter>):

| Parameter | Description |
|------------|------------------|
| instanceId | Task Instance ID |

Description

Triggered when comments for a task instance is retrieved and displayed on the task details page.

Task Experts

Displays a list of task experts based on task tags. Endorsement ratings are used for determining task experts.

Gadget Setting**Tags****Description**

Task tags for which the task experts must be retrieved.

Collapsible

Makes the Task Experts panel collapsible.

Subscribed Event

TASK_DETAILS_DASHBOARD_LOADED

Following is the input parameter in the payload
(payload.<parameter>):

| Parameter | Description |
|------------|------------------|
| instanceId | Task Instance ID |

Description

Displays data for a task instance.

TASK_ENDORSE_SUCCESSFUL

Following is the input parameter in the payload
(payload.<parameter>):

Refreshes the gadget after a user endorses a task expert.

| Subscribed Event | | Description |
|-----------------------------------|--------------------|---|
| Parameter | Description | |
| taskId | Task ID | |
| LOAD_EXPERTSPANEL | | Refreshes the Task Experts panel after an update. |
| Following is the input parameter: | | |
| Parameter | Description | |
| taskTypeName | Task type name | |

Task Header

Displays the header for a task. The header contains the parent task ID, priority, status, duration, and actions.

| Gadget Setting | Description |
|---|---|
| Instance ID | The Instance ID of the task. |
| Produced Event | Description |
| TASK_DETAILS_UPDATED | Triggered after updating the task priority. |
| LOAD_TASK_HEADER_DETAILS | Displays the header for a task instance. |
| TASK_ASSIGN_TO_USER | Triggered when you perform the Assign To task action. |
| Following is the output parameter in the payload (payload.<parameter>): | |
| Parameter | Description |
| taskId | Task ID |

Produced Event

ACCEPT_TASK_SUCCESSFUL

Following is the output parameter in the payload (payload.<parameter>):

| Parameter | Description |
|-----------|-------------|
| taskId | Task ID |

Description

Triggered when you perform the Accept task action.

ACCEPT_FOR_TASK_SUCCESSFUL

Following is the output parameter in the payload (payload.<parameter>):

| Parameter | Description |
|-----------|-------------|
| taskId | Task ID |

Triggered when you perform the Accept For task action.

BASIC_DELEGATE_SUCCESSFUL

Following is the output parameter in the payload (payload.<parameter>):

| Parameter | Description |
|--------------|---------------------------------|
| taskId | Task ID |
| targetUserID | Delegated user IDs in a list |
| responseJSON | Success message from the server |

Triggered when you perform the Delegate task action.

TASK_REMOVE_DELEGATION_SUCCESSFUL

Following is the output parameter in the payload (payload.<parameter>):

Triggered when you perform the Remove Delegations task action.

| Produced Event | | Description |
|----------------|-------------|-------------|
| Parameter | Description | |
| taskId | Task ID | |

| Subscribed Event | Description |
|--|--|
| LOAD_TASK_HEADER_DETAILS | Displays the header for a task instance. |
| TASK_DETAILS_DASHBOARD_LOADED | Displays data for a task instance. |
| Following is the input parameter in the payload (payload.<parameter>): | |

| Parameter | Description |
|------------|------------------|
| instanceId | Task Instance ID |

Task Summary

Displays the summary of a task instance.

| Gadget Setting | Description |
|--------------------------------|--|
| Instance ID | The Instance ID of the task. |
| Summary Tab Label | The title to use for the Summary tab. |
| Business Data Tab Label | The title to use for the Business Data tab. |
| Show Gadgets for Business Data | Replaces the existing CAF/OpenUI portlet with a gadget. A gadget URL must be defined while creating a task type in Software AG Designer for the gadget |

Gadget Setting**Description**

to replace the existing CAF/OpenUI portlet.

Produced Event**Description**

TASK_ENDORSE_SUCCESSFUL

Following is the output parameter in the payload (payload.<parameter>):

Triggered when a user endorses a task expert.

| Parameter | Description |
|-----------|-------------|
| taskId | Task ID |

Subscribed Event**Description**

TASK_DETAILS_DASHBOARD_LOADED

Following are the input parameters in the payload (payload.<parameter>):

Displays the data for the task instance.

| Parameter | Description |
|------------|------------------|
| instanceId | Task Instance ID |

GET_TASK_CHILDREN_STATUS

Following is the input parameter in the payload (payload.<parameter>):

Displays the status of the child tasks.

| Parameter | Description |
|---------------|----------------|
| parentTaskIds | Parent task ID |

UPDATE_TASK_DETAILS_TODO

Updates the to-do list of the task instance.

Following events are related to task actions:

Subscribed Event

TASK_ASSIGN_TO_USER

Following is the input parameter in the payload (payload.<parameter>):

| Parameter | Description |
|-----------|-------------|
| taskId | Task ID |

Description

Triggered when the task instance is assigned to a user.

ACCEPT_TASK_SUCCESSFUL

Following is the input parameter in the payload (payload.<parameter>):

| Parameter | Description |
|-----------|-------------|
| taskId | Task ID |

Triggered when the current user accepts the task instance.

ACCEPT_FOR_TASK_SUCCESSFUL

Following is the input parameter in the payload (payload.<parameter>):

| Parameter | Description |
|-----------|-------------|
| taskId | Task ID |

Triggered when the current user accepts the task instance on behalf of one or more users or roles.

BASIC_DELEGATE_SUCCESSFUL

Following is the input parameter in the payload (payload.<parameter>):

| Parameter | Description |
|-----------|-------------|
| taskId | Task ID |

Triggered when the current user delegates a task instance to another user.

TASK_REMOVE_DELEGATION_SUCCESSFUL

Following is the input parameter in the payload (payload.<parameter>):

Triggered when the current user removes task delegations.

| Subscribed Event | | Description |
|------------------|-------------|-------------|
| Parameter | Description | |
| taskId | Task ID | |

Task Calendar

Displays a calendar to identify the days when you have scheduled tasks and to search for tasks based on their date property. See [“My Calendar” on page 114](#).

| Gadget Setting | Description |
|--------------------|--|
| Task Type | The type of the task instance to search. |
| Saved Search | A saved search query for searching task instances. |
| Filter Fields | A date property for searching task instances. |
| Show Only My Tasks | View task instances that are assigned to the current user. |

| Produced Event | Description |
|------------------------------------|-----------------------|
| REGISTER_SCHEDULED_CALENDER_EVENTS | Updates the calendar. |

Task Child Details

Displays the child tasks of a parent task.

| Gadget Setting | Description |
|----------------|---|
| Parent Task ID | The ID of the parent task for which you want to view the child tasks. |

Subscribed Event

LOAD_CHILD_TASKS

Following is the input parameter in the payload
(payload.<parameter>):

| Parameter | Description |
|-----------|----------------------------|
| taskId | Task ID of the parent task |

Description

Loads the child tasks of a parent task.

TASK_TYPE_PERMISSION_LOADED

Following is the input parameter in the payload
(payload.<parameter>):

| Parameter | Description |
|-----------|----------------------------|
| taskId | Task ID of the parent task |

Loads the current user permissions for the parent task type.

TASK_ASSIGN_TO_USER

Following is the input parameter in the payload
(payload.<parameter>):

| Parameter | Description |
|-----------|----------------------------|
| taskId | Task ID of the parent task |

Triggered when you perform the Assign To task action, and it updates the tasks in the gadget.

ACCEPT_TASK_SUCCESSFUL

Following is the input parameter in the payload
(payload.<parameter>):

| Parameter | Description |
|-----------|-------------|
| taskId | Task ID |

Triggered when the current user accepts the task instance, and it updates the tasks in the gadget.

Subscribed Event

ACCEPT_FOR_TASK_SUCCESSFUL

Following is the input parameter in the payload (payload.<parameter>):

| Parameter | Description |
|-----------|-------------|
| taskId | Task ID |

Description

Triggered when the current user accepts the task instance on behalf of one or more users or roles, and it updates the tasks in the gadget.

Code Samples

Following code samples demonstrate how you can configure events in your gadgets:

Triggering an Event With Payload to Load a Process Diagram

The following code sample is for loading a process diagram using the Process Diagram gadget.

```
//Payload creation
var payload = new Object();
//Following is an example process Instance ID; Use a valid process Instance ID.
payload["instanceId"] = "9ef9a0d0-ac8a-18e7-8e09-ffffffdc4ca";
//Triggering an event to load the process diagram
_this.$scope.eventBus.fireEvent(EventConstants.PROCESS_DETAILS_DASHBOARD_LOADED,
payload);
```

You must define a function inside the `defineScope` element of the gadget controller file (controller.js) and add an argument that takes the process Instance ID as an input parameter. For more information about the gadget controller file, see the *Developing Gadgets for webMethods Business Console Guide*.

```
_this.$scope.loadProcessDiagram = function(processInstanceId) {
  //Your custom code, if any
  var payload = new Object();
  payload["instanceId"] = processInstanceId;
  //For example, "9ef9a0d0-ac8a-18e7-8e09-ffffffdc4ca";
  //Triggering an event to load the process diagram
  _this.$scope.eventBus.fireEvent(EventConstants.PROCESS_DETAILS_DASHBOARD_LOADED,
  payload);
  //Your custom code, if any
};
```

Additionally, call the function from the gadget view file (view.xhtml) and pass the process Instance ID as a parameter. For more information about the gadget view file, see the *Developing Gadgets for webMethods Business Console Guide*.

```
//Call the function using a button.
<button data-ng-click="loadProcessDiagram('9ef9a0d0-ac8a-18e7-8e09-ffffffdc4ca')">
  Load Process Diagram
</button>
```

You must add the Process Diagram gadget and your gadget to the same AppSpace.

Triggering an Event Without Payload to Refresh the Task Header

The following code sample is for refreshing the task header using the Task Header gadget.

```
//Triggering an event to refresh or reload
//task header in the "Task Header" gadget
_this.$scope.eventBus.fireEvent(EventConstants.LOAD_TASK_HEADER_DETAILS);
```

You must define a function inside the `defineScope` element of the gadget controller file.

```
_this.$scope.refreshTaskInformation = function(){
  //Your custom code, if any
  //Triggering an event to refresh or reload
  _this.$scope.eventBus.fireEvent(EventConstants.LOAD_TASK_HEADER_DETAILS);
  //Your custom code, if any
};
```

Additionally, call the function from the gadget view file.

```
//Calling the function from a button.
<button data-ng-click="refreshTaskInformation()">
  Reload Task Information
</button>
```

You must add the Task Header gadget and your gadget to the same AppSpace. The Task Header gadget must be configured with a valid task ID.

Triggering an Event with Custom Data to Load Experts

The following code sample is to load a list of experts for a task type using the Task Experts gadget.

```
//Define custom data or direct payload
//Task type is the name of the task type for
//which user endorsements have to be loaded
var taskTypeName = "DefaultTask";
//Triggering an event to load a list of task
//experts with taskTypeName as custom data
_this.$scope.eventBus.fireEvent(EventConstants.LOAD_EXPERTSPANEL,
taskTypeName);
```

You must define a function inside the `defineScope` element of the gadget controller file and add an argument that takes the task type as an input parameter.

```
_this.$scope.loadTaskExperts = function(taskTypeName){
  //Your custom code, if any
  //Triggering an event to load a list of task experts with
  //taskTypeName as custom data
  _this.$scope.eventBus.fireEvent(EventConstants.LOAD_EXPERTSPANEL, taskTypeName);
  //Your custom code, if any
};
```

Additionally, call the function from the gadget view file and pass the task type as a parameter..

```
//Calling the function from a button.
<button data-ng-click="loadTaskExperts('DefaultTask')">
  Load Task Experts
</button>
```

You must add the Task Experts gadget and your gadget to the same AppSpace.

For more information about developing gadgets, see the *Developing Gadgets for webMethods Business Console Guide*.

Managing AppSpace Groups

You can group AppSpaces. AppSpace groups are listed in the **AppSpace** tab.

You can do the following:

- Group AppSpaces by specifying a group while configuring the AppSpace. See [“Editing AppSpace Using Gadgets” on page 39](#).
- Move an AppSpace from one group to another by using the **Configure** option, and changing the group name for the AppSpace.
- Remove group association from an AppSpace by using the **Configure** option, and removing the group name for the AppSpace.
- Delete an AppSpace group. Deleting an AppSpace group also deletes the AppSpaces that are in the AppSpace group.

You cannot rename an AppSpace group.

Customizing Process Details Using Gadgets

If you have created a customized work stream by using the Work Stream built-in gadget, you can use gadgets to customize the process details page.

To customize process details page using gadgets

1. In the **AppSpace** tab, select the customized work stream AppSpace.
2. Select the **Customize Process Details Page** option on the process type bar.
3. Click **Edit Process Details**.
4. Use gadgets to customize the process details page. See [“Editing AppSpace Using Gadgets” on page 39](#).
5. Click **Save** to save the changes to the customized process details page.

Customizing Start Task Page using Gadgets

If you have created a customized work stream by using the Work Stream built-in gadget, you can use gadgets to customize the start task page.

To customize start task page using gadgets

1. In the **AppSpace** tab, select the customized work stream AppSpace.
2. Select the **Customize the Start Task Page** option on the task type bar.
3. Click **Edit Task Details**.

4. Use gadgets to customize the task details page. See [“Editing AppSpace Using Gadgets” on page 39](#).
5. Click **Save** to save the changes to the customized task details page.

Customizing Task Details Using Gadgets

If you have created a customized work stream by using the Work Stream built-in gadget, you can use gadgets to customize the task details page.

To customize task details page using gadgets

1. In the **AppSpace** tab, select the customized work stream AppSpace.
2. Select the **Customize Task Details Page** option on the task type bar.
3. Click **Edit Task Details**.
4. Use gadgets to customize the task details page. See [“Editing AppSpace Using Gadgets” on page 39](#).
5. Click **Save** to save the changes to the customized task details page.

Assigning Gadget Access Permissions

For each gadget you need to use in Business Console, administrator must set the access permission in My webMethods Server.

To assign gadget permissions

1. Log in as Administrator to My webMethods Server.
2. In My webMethods, navigate to **Applications > Administration > System-Wide > Permissions Management**.
3. Select **Business Console Gadgets** from the **Resource Type** list.
4. Click **Search**.
5. Move the required gadgets to the **Selected** list, and click **Next**.
6. Click **Edit** corresponding to the user, group, or role. If the user is not listed, click **Add** to add a user, group, or role.
7. Select **Grant** for **Gadget > Basic > View Object**.
8. Click **Ok**.

Assigning AppSpace and AppSpace Group Access Permissions

For users to view, modify, and delete AppSpaces and groups, the administrator must set the access permission in My webMethods Server.

Note: By default, My webMethods Server users have the view permission for AppSpaces. The administrator can remove the view permission if necessary.

To assign permissions

1. Log in as Administrator to My webMethods Server.
2. Navigate to **Applications > Administration > System-Wide > Permissions Management**.
3. Select one of the following from the **Resource Type** list.
 - To select an AppSpace, select **Business Console AppSpaces**.
 - To select an AppSpace group, select **Business Console AppSpace Group**.
4. Click **Search**.
5. Move the required AppSpaces or AppSpace Groups to the **Selected** list, and click **Next**.

The list of users, groups, and roles appears.

6. Click **Edit** corresponding to the user, group, or role. If the user is not listed, click **Add** to add a user, group, or role. For more information about user management, see the *Administering My webMethods Server* guide.
7. Select **Grant** for each permission that you want to assign.
8. Click **OK**.
9. Click **Apply**.

Installing Sample Gadgets

Install sample Business Console gadgets using the Install Administration page on My webMethods.

To install sample gadgets

1. Log in to My webMethods Server as sysadmin.
2. Click **Administration Dashboard > Configuration > Install Administration**.
3. Expand **MWS Component Directory > Samples > Business Console > Gadgets**.
4. Select Wm_bc_gadgets_samples.war.
5. Click **Install Selected** and click **Install**.

4 About Work Stream

| | |
|--|----|
| ■ About Work Stream | 86 |
| ■ Operations You Can Perform in Work Stream | 86 |
| ■ Showing and Hiding Projects in Work Stream | 87 |

About Work Stream

Work Stream organizes projects related to:

- AgileApps Cloud cases
- webMethods processes having task steps
- webMethods tasks

You can drill-down on a project and view real-time information of cases, processes, and tasks belonging to that project. For more information, see [“Operations You Can Perform in Work Stream” on page 86](#).

Operations You Can Perform in Work Stream

Work Stream is a categorized drill-down list. You can perform the following operations based on the permissions assigned to you.


| Category | Operations |
|-----------|--|
| Cases | <ul style="list-style-type: none"> ■ View, filter, and search case types ■ View and search case instances in case list ■ Start a case instance ■ Drill-down and view case instance details ■ Perform actions on case instances in case list ■ Customize case keylinks ■ Configure columns in a case list ■ Hide case type ■ Pin case type |
| Processes | <ul style="list-style-type: none"> ■ View, filter, and search process types ■ View and search process instances and callable processes in process list ■ Drill-down and view process instance details ■ Perform actions on process instances in process list ■ Configure columns in a process list ■ Customize process badges |

| Category | Operations |
|----------|---|
| | <ul style="list-style-type: none"> ■ Hide process type ■ Pin process type |
| Tasks | <ul style="list-style-type: none"> ■ View, filter, and search task types ■ Schedule the delegation of tasks associated with a particular task type ■ View and search task instances and to-do lists in task list ■ Start a task instance ■ Create a to-do list ■ Drill-down and view task instance details ■ Perform actions on task instances in task list ■ Configure columns in a task list ■ Customize keylinks ■ Hide task type ■ Pin task type |

Showing and Hiding Projects in Work Stream

You can show and hide projects in **Work Stream**. This action allows you to view only projects that you want in **Work Stream**.

To show or hide projects

1. Select **Show/Hide Project Types** from the  Settings menu.
The Show/Hide Project Types dialog appears.
2. Do one of the following:
 - To show projects, select the check boxes corresponding to the projects.
 - To hide projects, clear the check boxes corresponding to the projects.
3. Click **Apply**.

5 About Cases

| | |
|------------------------|----|
| ■ Managing Cases | 90 |
|------------------------|----|

Managing Cases

Case types are listed in **Work Stream**. The case list for each case type displays cases based on your roles and privileges.

Note: Case types are defined in AgileApps Cloud. For more information, see the AgileApps Cloud documentation.

Only users with AgileApps Cloud role membership can work on cases in Business Console. For more information, see [“Assigning AgileApps Cloud Roles to Users” on page 18](#). Alternatively, to view and manage cases in Business Console, you can configure AgileApps Cloud as a Service Provider in My webMethods Server. For more information, see [“Configuring AgileApps as a Service Provider to Access Cases” on page 90](#).

You can filter cases in the case list using case keylinks on the case type bar. For more information on customizing case keylinks, see [“Customizing Case Keylinks” on page 96](#). You can also use the search field to search for cases in the case list. For more information, see [“Searching for Case Instances” on page 96](#).

You can perform actions on a case in the case list or in the case details page. For more information, see [“Case Actions” on page 95](#).

To perform actions on a case using:

- Case list. See [“Case List Operations” on page 91](#).
- Case details page. See [“Case Instance Operations” on page 92](#).

Configuring AgileApps as a Service Provider to Access Cases

You can configure AgileApps Cloud as a Service Provider in My webMethods Server to access cases in Business Console.

To configure AgileApps Cloud as a Service Provider

1. Open the `custom_wrapper.conf` file in a text editor.

You can find the file at the following location:

Software AG_directory\profiles\MWS_serverName \configuration

2. Add the following property to the file.

```
wrapper.java.additional.604=-Dcasemanagement.samlso.useSAMLResponse=true
```

3. Restart My webMethods Server.
4. Register AgileApps Cloud as a Service Provider in My webMethods Server. Perform the following:

- a. As system administrator, navigate to **Folders > Administrative Folders > Administration Dashboard > Configuration > SAML SP Registration**.
 - b. Click **Register New SP**, specify the registration details, and then click **Submit**.
5. Register My webMethods Server as a third-party identity provider (IDP) in AgileApps Cloud.
 To know details for registering My webMethods Server, navigate to **Folders > Administrative Folders > Administration Dashboard > Configuration > SAML IDP Configuration**. For more information about registering an IDP, see the AgileApps Cloud documentation.
6. Specify the AgileApps Cloud URL in the Administration page of Business Console.
 Ensure that the same URL is specified at the following locations:
 - **SAML Issuer Identifier** field in the Service Provider registration page of My webMethods Server.
 - **SAML Request Issuer URL** field in the Single Sign-On (SSO) settings page of AgileApps Cloud.

Case List Operations

Case lists display cases for case types in **Work Stream**. You can view information about cases such as case number, case status, and case priority in case lists. The following table lists the operations you can perform using a case list.

| <u>Operation</u> | <u>Description</u> |
|--|--|
| Perform case actions such as Assign to User and Delete | See “Case Actions” on page 95 . |
| Search for case instances | See “Searching for Case Instances” on page 96 . |
| Create a case instance | See “Starting Cases” on page 95 . |
| Configure case list columns | Use the Configure Columns settings. |
| Claim cases | See “Claiming Cases” on page 93 . |
| Assign cases | See “Assigning Cases” on page 94 . |
| View case instance details | Click the case number corresponding to the case instance in the case list. |

| Operation | Description |
|-----------|--|
| | See “Case Instance Operations” on page 92. |



Case Instance Operations

From the case list on **Work Stream**, you can navigate to a case details page and perform the following operations:

| Operation | Description |
|---|--|
| View the case type | Name of the case type for the case instance. |
| View the case properties such as case number, description, priority, and status | See “Case Properties” on page 92. |
| View activities, workflows, comments, attachments, and hours logged for the case. | Use the toggle switches on the left side vertical bar of the case details page to show/hide Activities, Workflows, Activity Stream, Attachments, and Hours Logged panels of the case instance. |
| Add activities | See “Adding Activities to Case Instances” on page 94. |
| Perform case actions such as Assign to User and Delete | See “Case Actions” on page 95. |
| View the business data of the case instance | Business data of the case is displayed in the Business Data tab. |
| Change the priority of a case | Select a priority for the case from the Priority list. Case priorities are defined in AgileApps. For more information, see the AgileApps documentation. |

Case Properties


You can view these case properties in the case details page.

| Property | Description |
|------------------|--|
| <i>Case Type</i> | The case type of the case instance. |
| Priority | Priority of the case. |
| Status | Status of the case. |
| Duration | Length of time since the case is active. |
| Case Number | Case number assigned to the case in AgileApps Cloud. |
| Description | Description for the case. |
| Subject | Subject of the case. |
| Activities | List of activities associated with the case instance. You can add new activities to the case instance. See “Adding Activities to Case Instances” on page 94. |
| Workflows | List of workflows associated with the case instance. These workflows are defined in AgileApps Cloud for the case. You can click  or  to start/stop each workflow. |
| Activity Stream | Comments provided for the case. Click the toggle switch on the left side vertical bar of the case details page to show/hide the Activity Stream panel. |
| Attachments | Attachments added to the case. Click the toggle switch on the left side vertical bar of the case details page to show/hide the Attachments panel. |
| Hours Logged | Displays the hours logged for the case in AgileApps Cloud. |

Claiming Cases

When you claim cases, the cases are assigned to you. You can claim one or more cases in the case list.


To claim cases

1. Locate the case type in **Work Stream**.
2. Click on the case type bar.
3. Select the cases that you want to claim in the case list. To select more than one case, press CTRL.
4. Select **Claim** from  Settings menu.
5. Click **Yes** in the confirmation dialog.

Assigning Cases

You can assign one or more cases in the case list to other users.


To assign cases

1. Locate the case type in **Work Stream**.
2. Click on the case type bar.
3. Select the cases that you want to assign in the case list. To select more than one case, press CTRL.
4. Select **Assign To** from  Settings menu.
5. Select the user to whom you want to assign the cases.
6. Click **OK**.

Adding Activities to Case Instances

The Activities panel in the case details page allows you to add activities to a case. For information about how to perform actions on an activity associated with a case, see “[Actions in a Case Activity](#)” on page 95.

To add activities to a case

1. Locate the case type in **Work Stream**.
2. Click on the case type bar.
3. Click the case number corresponding to the case instance in the case list.
The case details page appears.
4. Click the toggle switch on the left side vertical bar to show the Activities panel.
5. Click  to add a new activity.
The Add New Activity dialog appears.
6. Select one of the following:

- **Single Step.** This option allows you to create the new activity with minimum details.
 - **Activity Form.** This option allows you to specify more details for the new activity.
7. Enter values in the fields for the activity.
 8. Click **Save**.

Actions in a Case Activity

You can perform actions on an activity associated with a case in the case details page.

To perform an action on an activity

1. In the case details page, click the **Activity ID** for the activity in the Activities panel.
2. Select one of the following actions depending on the current status of the activity.

| Action | Use this action to.. |
|----------------|---|
| Assign to User | Assign the activity to a user. |
| Delete | Delete the activity. |
| Complete | Change the activity status to Complete. |

Case Actions

Depending on your access privileges and the current status of the case instance, you can perform these actions:

| Action | Use this action to.. |
|-----------------------|----------------------------|
| Assign to User | Assign the case to a user. |
| Delete | Delete the case. |

Starting Cases

You can use the **Start Case** option on a case type bar in **Work Stream** to create and start a case.

To create and start a case

1. Locate the case type in **Work Stream**.

2. Select **Start Case** from the menu on the case type bar.

The Create Case Instance dialog appears.

3. Enter values in the fields for the case. Make sure to specify the **Subject** and **Description** for the case.
4. Click **Create**.

Customizing Case Keylinks

In the Customize Case Keylinks dialog, for each keylink:

| To... | Do... |
|-------------------------|---|
| Change the saved search | Select the saved search from the Keylink Name list. The saved searches available in the list are defined in AgileApps Cloud. |
| Change the icon | Select an icon from the Icon list. |
| Save changes | Click Save . |

Searching for Case Instances

Use the search field in case lists to search for case instances of a case type. In the search field, you can:






- Provide a case number and search for a specific case instance.
- Use saved searches to search for case instances.

To use a saved search

1. Click ▼ in the search field of a case list.
2. Click the **Saved Searches** tab.
3. Select a saved search from the list. The saved searches available in the list are defined in AgileApps Cloud.
4. Click **Go**.

Collaborating Case Activities

In **Activity Stream**, users can share comments, and view activities related to a case type or case instance. **Activity Stream** displays the activities related to the case type selected in **Work Stream**. The table below lists the operations you can perform in **Activity Stream**.

| Click... | To... |
|---|---|
|  | Refresh content in Activity Stream to view the latest changes. |
|  | Post a global comment or case-specific comment. |
|  | Show older posts in Activity Stream. |
|  | Reply to a comment made for a case type. |
|  | Draft an email in the E-mail dialog box and send an email to the user, who wrote the comment. |

6 About Processes

| | |
|----------------------------------|-----|
| ■ Managing Processes | 100 |
| ■ Process Instance Details | 100 |

Managing Processes

Work Stream lists process types with task steps. The process list for each process type displays processes that you have privileges to view. You can use the search field to search for processes in the process list.

Manage tasks using:

- Process lists.
- Process detail page. See [“Process Instance Details” on page 100](#).

Process Instance Details

When you navigate to a process detail page by using the process list on **Work Stream**, you can view the process instance details in the **Summary** tab and the process model diagram in the **Diagram** tab.

Use the toggle switches on the left side vertical bar of the process detail page to hide/show the consolidated task list, callable processes, activity stream, and attachments of the process instance.

The following information is available on the process detail page. For more information about the process details, see the descriptions in the tables below.

- Properties of the process instance in the **Summary** tab.
- List of task instances belonging to the process instance in the **Task Instances** panel. For customizing the task instances panel, see [“Customizing Task Instance Panel” on page 102](#).
- Process diagram in the **Diagram** tab.
- Process activities (consolidated list of activities related to all the tasks belonging to the process instance) in the **Activities Stream** panel.
- Process attachments (all the attachments of the tasks belonging to the process instance) in the **Attachments** panel.

| Field | Description |
|----------------------------|---|
| <i>Process type name</i> | Name of the process type or process model of the process instance. |
| <i>Process instance ID</i> | ID of the process instance. |
| Status | Status of the process instance. For more information, see “Process Instance Statuses” on page 103 . |

| Field | Description |
|----------|--|
| Duration | Length of time since a process instance is active. |

Summary Tab

| Field | Description |
|--------------------|--|
| Instance ID | Unique identifier for the process instance. |
| Custom ID | Meaningful identifier you have provided for the process instance. |
| Process Name | Name of the process type or process model of the process instance. |
| Model Version | Name of the model version used for the process instance. |
| Start Date / Time | Date and time the process instance started. |
| Last Updated | Last date and time that information was logged for the process instance. |
| Model Type | Name of the model type used for the process instance. |
| Instance Iteration | Number of times the process instance has been submitted. |
| Tags | Tags specified for the process instance. |


Diagram Tab

In the **Diagram** tab, you can view an image of the process model as designed in Designer, if an image is available for the process model. You also have an option to view the process instance information available on My webMethods.

Viewing Business Rules Decision Entities

To view decision entities, you need a My webMethods user account with permissions to read application pages. You must also ensure that the Business Rules user interface is installed on My webMethods Server. For more information about Business Rules and My webMethods Server permissions, see *webMethods BPM Rules Development Help* and *Working with Business Rules in My webMethods*.

To view decision entities

1. Click  on the process details page.

The **Business Rules** panel displays the name of the rule project, the name of the decision entity, and the type of the decision entity.

2. Click the decision entity that you want to view.

You can view the information in the **Decision Table** panel.

In addition, you can see the processing mode and description of the decision entity.

To show or hide this information, click .

To open the decision entity in the Business Rules user interface on My webMethods Server, click .

3. To view the change history of the decision entity:

- a. Click  to expand the **Change History** panel and view the events.

- b. (Optional) To view more information about an event, click .




- c. (Optional) To view events in a specific time period, select a time period in the **Time Period** list, and click **Done**.

The events for the selected time period are displayed in the **Change History** panel.

Note: The events in the **Change History** panel pertain to a particular date and time, but the **Decision Table** panel always displays the current information. So, the information displayed in the **Change History** panel might differ from the **Decision Table** panel.

Customizing Task Instance Panel

To customize the task instance panel

1. Click  on the task instance panel.
2. For each task type you want to customize in the task instance panel on the process details page, select the columns. Perform these steps:
 - a. Select the task type name.
 - b. On the column header, select the check boxes corresponding to the columns to be displayed.
 - c. Select the fields to be displayed in each of the column selected for display.
3. Click  or  to add or remove a task type specification.
4. Click **Apply** to apply the new settings for the task instance panel on the process details page.

5. Click **Reset** to display the task ID, task type name, and status of the task instances in the task instance panel on the process details page.

Process Instance Statuses

| <u>Process Status</u> | <u>Determines</u> |
|-----------------------|--|
| Running | Process instance is started, running, or revised. |
| Failed | Process instance has failed. |
| Completed | Process instance has completed or stopped. |
| Other Status | Process instance status is other than the ones mentioned above such as: <ul style="list-style-type: none">■ Failed (Escalated)■ Suspended■ Resumed■ Submitted |

7 About Tasks

| | |
|---|-----|
| ■ Managing Tasks | 106 |
| ■ Searching for Task Instances | 118 |
| ■ Using To-Do Lists | 120 |
| ■ Task Charting and Analyzing Task Activities | 124 |
| ■ Collaborating Task Activities | 126 |

Managing Tasks

Work Stream lists the task types of both stand-alone tasks and tasks used in processes. The task list in **Work Stream** displays all tasks of a task type that you have privileges to view, regardless of the task assignment. Tasks displayed on the task list are filtered based on the task keylink selected on the task type bar. For information on customizing task keylinks, see [“Customizing Task Keylinks” on page 118](#).

Use the search field to search for tasks and view the results in the task list. The completed tasks are not listed by default in a task list, but you can search for the completed tasks. For more information, see [“Searching for Task Instances” on page 118](#).

A task can have child tasks and to-do lists. The child tasks can be mandatory or non-mandatory. If a child task is specified as mandatory, the parent task cannot be marked as completed unless the status of the mandatory child task is Completed, Error, Canceled, or Expired. For more information see, [“Creating an Instant Task” on page 126](#) and [“Using To-Do Lists” on page 120](#).

You can apply task management actions to the tasks listed in task list or in the task instance details page. To apply various task management actions to the tasks in the task list, the task status must be Active, Error, or Suspended. You cannot apply task list management actions to tasks with canceled, Completed, or Expired status. For more information, see [“Task Actions” on page 111](#).

You can schedule the delegation of tasks associated with a particular task type. For more information, see [“Scheduling Task Delegations” on page 115](#).

Manage tasks using:

- Task lists. See [“Task List Operations” on page 106](#).
- Task detail page. See [“Task Instance Operations” on page 107](#).

Task List Operations

Task lists display tasks, child tasks, and to-do lists grouped by task type. The following table lists the operations you can perform using a task list in **Work Stream**.

| Operation | Description |
|---|---|
| View task ID, task name, task status and priority of task instances | See “Task Status” on page 112 and “Task Priority” on page 111 . |
| Schedule a task | See “Scheduling Tasks” on page 113 . |

| Operation | Description |
|--|--|
| Schedule task delegation | See “Scheduling Task Delegations” on page 115. |
| Start a task | See “Starting Tasks” on page 116. |
| Search for task instances | See “Searching for Task Instances” on page 118. |
| Perform task actions such as Resume, Suspend, Assign To, Accept For, and Resubmit. | See “Task Actions” on page 111. |
| Configure task list columns | Use the Configure Columns settings. |
| View business data of task instances | Use the Configure Columns settings to view business data in a task list. |
| Create an instant task | See “Creating an Instant Task” on page 126. |
| Use to-do lists | See “Using To-Do Lists” on page 120. |
| View task instance details | Click the task ID corresponding to the task instance in the task list. See “Task Instance Operations” on page 107. |

Task Instance Operations

When you navigate to a task detail page by using the task list on **Work Stream**, you can view details of a task instance, and perform the following operations:

| Operation | Description |
|---|--|
| View the task type | Name of the task type of the task instance. |
| View the task properties such as task ID, custom ID, task name, description, status, priority, and duration in the Summary tab | See “Task Properties” on page 109. |

| Operation | Description |
|---|---|
| View to-do tasks, attachments, comments, experts, and audit information of the task | Use the toggle switches on the left side vertical bar of the process instance page to show/hide Comments, Task Experts, Attachments, and Audit panels of the task instance. |
| Perform task actions such as Resume, Suspend, Assign To, Accept For, and Resubmit. | See “Task Actions” on page 111. |
| Change the schedule of a task | See “Rescheduling Tasks” on page 113. |
| Create or view child tasks | See “Creating an Instant Task” on page 126. |
| Create or view to-do lists | See “Using To-Do Lists” on page 120. |
| View the business data of the task instance in the Business Data tab | Business data required by the task is passed from the process. Make sure you do not specify page refresh action for business data. |
| Perform actions on a task | Select an action from the Actions list. See “Task Actions” on page 111. |
| Change the priority of a task | Select the priority for the task (None, Low, Medium, High, Critical) from the Priority list. |
| Endorse users for the task | Click Endorse in the Summary tab, and provide the endorsement rating for the users. This option is available only if you have enabled endorsements. See “Configuring User Endorsement Rating” on page 27. |
| View or post task comments | View or post comments in the Comments panel. |
| View or post task attachments | View or post attachments in the Attachments panel. |

| Operation | Description |
|---|---|
| View task experts, email tasks experts, or assign a task to a task expert | Select the expert from the Task experts panel, and perform the required action. |
| Add tags for a task | Type new tags in the Tags field in the Summary tab. |
| Set the expiry date for a task | Set the expiry date for the task in the Expiry Date field. |

Task Properties

You can view the task properties in the task detail page.

| Property | Description |
|-----------------------------|--|
| Process Instance | Process instance information if the task instance is associated to a process. |
| <i>Task Type</i> | The task type name of the task instance. |
| Task ID/Custom ID/Task Name | <p>One of the following appears based on the selected property in the Display Name field in the Administration page.</p> <ul style="list-style-type: none"> ■ The task identification number assigned to the task by the Task Engine. ■ Custom ID defined by you for the task instances. ■ Name of the task provided by you or defined by a process. |
| Priority | Priority defined for the task. See “Task Priority” on page 111 . |
| Status | Status of the task. See “Task Status” on page 112 . |
| Duration | Length of time since the task is active. |
| Created by and date | By whom and when the task was created. |
| Last accepted by and date | By whom and when was the task last accepted. |

| Property | Description |
|---------------------------|--|
| Last modified by and date | By whom and when was the task last modified. |
| Name | Name of the task. |
| Description | Description provided for the task or defined by the process. |
| Expiry date | Expiration date for the task. |
| Assigned to | Name of users, groups, or roles to whom the task is assigned. |
| Delegation | Shows from whom and to whom the task has been delegated. |
| Contributors | Persons contributing to the task. Note: If auto-accept is set to true for a task during design time, the list of contributors for the task is not updated if the task is opened, changed, or closed from Business Console. |
| Tags | Tags specified for the task. |
| Mandatory | This option for child tasks specifies if the task is mandatory. If a task is specified as mandatory, the parent task cannot be marked as completed unless the mandatory child task is in Completed, Error, Canceled, or Expired status. |
| To-Do tasks | List of to-do tasks, if any. |
| Task Experts | Experts endorsed for the task. Click the toggle switch on the left side vertical bar of the process instance page to show/hide the Task Experts panel. |
| Comments | Comments provided for the task. Click the toggle switch on the left side vertical bar of the process instance page to show/hide the Comments panel |

| Property | Description |
|-------------|---|
| Attachments | Attachments added to the task. Click the toggle switch on the left side vertical bar of the process instance page to show/hide the Attachments panel. |
| Audit | Displays the audit information of the task. |

Task Priority

You can escalate or change the priority of task instances to any of the following values based on your business requirement:

- None
- 1-Critical
- 2-High
- 3-Medium
- 4-Low

Task Actions

Depending on the access privileges and the current status of the task instance, you can perform these actions on tasks:

| Action | Use this action to... |
|-------------------|--|
| Resume | Resume a suspended task. |
| Suspend | Suspend an active (running) task. |
| Assign To | Assign a task to one or more users, groups, or roles. The task appears on the user's My Inbox. |
| Accept For | Accept a task on behalf of one or more users or roles. The task appears in each individual user's task inbox as an accepted task. You cannot accept a scheduled task on behalf of other users. |
| Accept | Accept a task. |
| Resubmit | Resubmit an active task. This forces the task data to be re-evaluated regardless of whether or not any of the data has |

| Action | Use this action to... |
|----------------------------|--|
| | been modified. Note that resubmitting a task can have an effect on task assignments. |
| Set Status | Change the status of the task. Available settings are Active, Completed, Error, Canceled, Expired, and Suspended. You cannot set the status of a scheduled task. |
| Delete | Delete a task from the current process list. |
| Delegate | Delegate a task to another user. |
| Remove Delegations | Remove all delegations applied to the task. |
| Create Instant Task | Opens the New Instant Task dialog box. |
| To-Do List | Create a list of to-do tasks. This option is not available in Task Inbox. |

For more information about applying task actions on tasks, see *webMethods Task Engine User's Guide*.

Task Status

The task status can be set manually by a user, or automatically by the Task Engine as a result of processing rules.


Task statuses:

| Task Status | Description |
|------------------|--|
| New | The task is in New status only if the queued task is not scheduled or specified for immediate start. Immediately after a task starts, the status transitions from New to Active . |
| Scheduled | Task is scheduled to start at the specified date and time. At the scheduled time, the status of the task changes from Scheduled to Active . |
| Active | The task is running normally and is available for user interaction. |
| Completed | The task is complete. No further work can be done on a task that is completed, other than deleting it. |

| Task Status | Description |
|------------------|---|
| Error | The task has transitioned to an error condition. No further work can be done on a task that is in Error status, other than deleting it. |
| Canceled | The task is canceled. No further work can be done on a task that is canceled, other than deleting it. |
| Suspended | The task is suspended. A suspended task can be resumed or placed back into Active status by a manual user action or as the result of a task event evaluation. |
| Expired | The task has expired as a result of a manual action by a user or as a result of a task event evaluation. |

Scheduling Tasks

When you create a new task instance, you can specify the date and time to start the new task. Task instances scheduled to start at a later time are in Scheduled state. You can reschedule tasks anytime before the start time. At the specified start time, the task starts, and the state of the task changes from Scheduled to Active. You cannot manually change the status of a scheduled task or accept scheduled tasks.

My Calendar on the What's Happening Now tab,  scheduled task icon on the task list, and the status property of the task help you identify the scheduled tasks. For information about My Calendar, see [“My Calendar” on page 114](#).

Use one of the following to schedule or reschedule task instances:

- Business Console user interface. For information about scheduling a task, see [“Starting Tasks” on page 116](#). For information about rescheduling a task, see [“Rescheduling Tasks” on page 113](#).

Important: You cannot schedule task instances of task types that were created prior to version 9.10.

- Task Engine WmTaskClient services. For information about using `queueTask` and `updateTask` Task Client services, see *webMethods Task Engine API and Service Reference*.
- My webMethods Server RESTful services. For information about using RESTful services, see *webMethods Task Engine API and Service Reference*.

Rescheduling Tasks

You can reschedule tasks that are in Scheduled state. You cannot re-schedule a task to start earlier than the current date and time or after the expiry date.

To reschedule tasks


1. In the task list, select the scheduled task you want to edit.
2. In the task detail page, edit the **Task Schedule Date** field to specify the new date and time when the task should start.
3. Click **Save**.



My Calendar

My Calendar displays your scheduled tasks. Additionally, you can search for tasks based on their date property such as creation date, last updated date, accepted date, and expiry date.

My calendar displays the current month by default. However, you can navigate to other months if needed. **My Calendar** indicates the current date in gray color, and your scheduled tasks and task search results are indicated in blue color.

The following table lists the operations you can perform in **My calendar**:


| To... | Do... |
|---|--|
| Refresh the calendar to display the latest changes | Click  Refresh. |
| Search for tasks | For more information about searching tasks, see “Searching for Tasks using My Calendar” on page 115 . |
| Identify the dates you have scheduled tasks | Look for dates colored blue. Dates marked with darker shades of blue indicate that multiple tasks are scheduled for those dates. |
| View which tasks are scheduled to start on a date | Click the date marked for scheduled tasks and view the scheduled task list. |
| View details, reschedule, or edit details of a scheduled task | <ol style="list-style-type: none"> 1. Click the date marked for the scheduled task. 2. Click on the task ID of the task to view the task details page. For information about task details, see “Task Properties” on page 109 . |
| View the current month if you have scrolled to other months | Click Today . |

| To... | Do... |
|--------------------------------|---|
| Navigate to the next month | Click  . |
| Navigate to the previous month | Click  . |



Searching for Tasks using My Calendar

You can use **My Calendar** to search for tasks based on their date property.

To search tasks

1. Click  on **My Calendar**.
The Calendar Settings dialog box appears.
2. Specify the following fields:

| Field | Specify... |
|----------------------|---|
| Task Type | A task type for the tasks. |
| Saved Search | A search criteria for searching tasks. For example, all tasks or critical tasks in the selected task type. |
| Filter Fields | A date property for searching tasks. For example, creation date, last updated date, accepted date, or expiry date of tasks. |



3. To view tasks that are assigned only to you in the search results, select the **Show Only My Tasks** check box.
4. To add more task types to search, click  .
You can click  to remove task types.
5. Click **Submit**.



Depending on the searched tasks, dates appear in blue color on **My Calendar**. You can click the date to view related tasks and send task reminders.

Scheduling Task Delegations

You can schedule the delegation of tasks associated with a particular task type.

To schedule the delegation

- Do one of the following to open the Schedule Delegation dialog box:
 - Locate the task type in Work Stream and select **Schedule Delegation** from the menu on the task type bar.
 - On My Inbox, click  and select **Schedule Delegation**.
 - On Task Inbox, select one of the task types, then click  and select **Schedule Delegation**.
- Specify the fields listed in the following table:

| Field | Description |
|----------------|---|
| Task | <p>Select the task type.</p> <p>Note: This field does not appear on the Schedule Delegation dialog box when you open it from the Work Stream or after selecting a task type in Task Inbox.</p> |
| Delegated From | <p>Click the  icon and select a user from whom the task type must be delegated to another user.</p> <p>Note: You cannot select a user in this field when you open the Schedule Delegation dialog box from My Inbox. In this case, your user name is used for scheduling the delegation.</p> |
| Delegated To | <p>Click the  icon and select a user to whom the task type must be delegated.</p> |
| Date | <p>Select the start date, start time, end date, and end time for the delegation.</p> |

- Click **Add**.

You can click the **View Schedule Delegation** tab to view scheduled delegations. In addition, you can delete scheduled delegations.

Starting Tasks

You can use one of these options to create and start a task immediately, or to schedule a task:

- **Instant Task** tab available on the left margin of Business Console. See [“Using Instant Task Tab” on page 117](#).
- **Start Task** option on a task type bar on **Work Stream**. See [“Using Start Task Option” on page 117](#).

Using Instant Task Tab

To instantly create and start a task instance

1. Click the **Instant Task** vertical tab on the left margin.
2. Select the task type for the task instance from the drop-down list.
3. Click **Go**.
4. Input the properties for the new task in the Start Task dialog. See [“Start Task Properties” on page 118](#).

Start Task dialog displays the properties only if the interface for start task (or queue task) is defined for the task type.

Important: A newly created task is in scheduled state if you have specified a schedule for starting the task. At the scheduled time, the status of the task changes from scheduled to active.

5. Click **Start Task**.
You get a confirmation message and the task ID of the new task.
6. Click **Close**.

Using Start Task Option

To start a task of a task type

1. Locate the task type in **Work Stream**.
2. Select **Start Task** from the menu on the task type bar.
3. Input properties for the new task in the Start Task dialog. See [“Start Task Properties” on page 118](#).

Start Task dialog displays the properties only if the interface for start task (or queue task) is defined for the task type.

Important: A newly created task is in scheduled state if you have specified a schedule for starting the task. At the scheduled time, the status of the task changes from scheduled to active.

4. Click **Start Task**.
You get a confirmation message and the task ID of the new task.

Start Task Properties

In the Start Task dialog, specify the following properties for the new task.

| Property | Specify... |
|---------------------------|---|
| Name | Name for the task instance. |
| Description | Description for the task instance. |
| Priority | Priority for the task instance. |
| Custom Task ID | Custom identification for the task instance. |
| Task Schedule Date | Date when the task instance should start. |
| Time | Time when the task instance should start on the date specified in Task Schedule Date . |

Customizing Task Keylinks

In the Customize Keylinks dialog, for each keylink:

| To... | Do... |
|-------------------------|--|
| Change the saved search | Select the saved search from the Keylink Name list. |
| Change the icon | Select an icon from the Icon list. |
| Save changes | Click Save . |

Searching for Task Instances

Use the search field in the task lists to search for task instances of a task type. In the search field, you can:

- Provide a task ID and search for a specific task instance.

- Create a search criteria for searching task instances.
- Save and reuse search criteria for searching task instances. For more information, see [“Using Saved Searches” on page 119](#).

Using Saved Searches

You can save a search criteria for tasks and reuse the saved searches in Business Console or My webMethods.

In Business Console, the functionality to create, modify, delete, and reuse public and private task searches is available in the task lists viewed through Work Stream, My Inbox, or a custom inbox.

A private saved search is available only to the user who created the saved search. Public saved searches are available to all Task Engine users. A saved search can be made available in the task list of a specific task type or in all task lists.

Saved searches can be used for customizing task keylinks and for charting.

| Action | Perform these steps... |
|---------------------------|---|
| Create a new saved search | <ol style="list-style-type: none"> 1. Click ▼ in the search field of a task list. 2. Click the Create New Search tab. 3. Select the fields and criteria for the search. Click + to add more criteria for the search. Click - to remove a search criteria. 4. Click Save Search. 5. Provide a name and description for the search criteria. 6. Select whether you want the new search to be available to all users (Public), or to you only (Private). By default, the saved searches are private, and available only to user who created the saved search. 7. Select whether the new search should be available in all task lists or only to the current task type. 8. Click Save. |
| Use a saved search | <ol style="list-style-type: none"> 1. Click ▼ in the search field of a task list. 2. Click the Saved Searches tab. 3. Select a saved search from the list. Click Show Details to view the search criteria of a saved search. |

| Action | Perform these steps... |
|-----------------------|--|
| Modify a saved search | <ol style="list-style-type: none"> 4. Click Go. <ol style="list-style-type: none"> 1. Click ▼ in the search field of a task list. 2. Click the Saved Searches tab. 3. Select the saved search that you want to modify. Click Show Details to view the search criteria of the saved search. 4. Select the fields and criteria for the search. Click + to add more criteria for the search. Click - to remove a search criteria. 5. Click Update Saved Search. |
| Delete a saved search | <ol style="list-style-type: none"> 1. Click ▼ in the search field of a task list. 2. Click the Saved Searches tab. 3. Select a saved search that you want to delete. Click Show Details to view the search criteria of the saved search. 4. Click Delete. |
| Clear a custom search | Remove "Custom search applied" from the search field. |

Using To-Do Lists

A to-do list is a defined set of tasks. A to-do list has a parent task and a set of child tasks belonging to one or more task types. You can have both mandatory and non-mandatory tasks in a to-do list. Each child task can be assigned to one or more users. For example, you might want to create a to-do list task for grouping the sub-tasks of a hiring or procurement process.

You can create a to-do list by using a new to-do list template or by re-using an existing to-do list template. For information about configuring to-do lists, see ["Configuring To-Do List Setting" on page 27](#).



The table below lists the to-do list operations that you can perform and the privileges that you must have for performing the operations.

| To... | You need this functional privilege... | See... |
|---|---------------------------------------|--|
| Create, update, or delete a to-do list template | Create To-do List Template | <ul style="list-style-type: none"> ■ “Creating To-Do List Templates” on page 121 ■ “Viewing, Updating, or Deleting To-Do List Templates” on page 122 |
| Create a to-do list | Create To-do List | <ul style="list-style-type: none"> ■ “Creating To-Do Lists” on page 122 ■ “Viewing and Updating To-Do Lists” on page 123 |
| View to-do list template | Use Public To-do List Template | “Viewing, Updating, or Deleting To-Do List Templates” on page 122 |

Creating To-Do List Templates

To-do list templates are useful for creating to-do lists. You can specify the child tasks and the attributes for each child task either when you create the to-do list template or when you later update the template.

To create a to-do list template

1. Select the **To-Do List** menu option on the task type bar or from the **Actions** menu of a task in the task list.
2. Provide a name for the to-do list.
3. Provide the attribute values for the child tasks. If required, you can change the attribute values of the child tasks after creating the to-do list. For information about the attributes, see [“To-Do List Attributes” on page 123](#).
 - Click  to add a child task.
 - Click  to remove a child task.
 - If you want to remove all the child task definitions in the to-do list, click **Clear Entries**.
4. Click **Save To-Do List Template**.

5. Type the unique name for the to-do list template and select whether you want the template to be private or public.



A private to-do list template is available only to the user who created it. Public to-do list templates are available for all users.

Viewing, Updating, or Deleting To-Do List Templates

After you create a to-do list, you can view the template, and edit the template as required.

Except for the to-do list template name and the access right (public or private), you can update the values of other attributes of the to-do list template.

To view and update a to-do list template

1. Select the **To-Do List** menu option on the task type bar or from the **Actions** menu of a task in the task list.
2. Select the template you want to use from the **Saved To-Do List Template**.
3. To change the attribute values of the child tasks, edit the attribute values. If required, you can change the attribute values of the child tasks after creating the to-do list. For information about the attributes, see [“To-Do List Attributes” on page 123](#).
 - Click  to add a child task.
 - Click  to remove a child task.
4. Click **Update To-Do List Template** to save the changes.
5. Click **Delete to-Do List Template** to remove the template.

Creating To-Do Lists

You can create a to-do list with or without using a to-do list template. When you create a to-do list, you create instances of all the tasks defined in the to-do list template.



To create a to-do list

1. Select the **To-Do List** menu option on the task type bar or from the **Actions** menu of a task in the task list.

If you select the **To-Do List** menu option from the **Actions** menu in a task list, the task ID of the parent task type is specified by default in the **Associated To** field.
2. Provide a name for the to-do list.
3. If you want to create a to-do list by using a saved to-do list template, click the **Saved To-Do List Template** tab and perform the following steps:
 - a. Select the template you want to use from the **Saved To-Do List Template**.

- b. If required, provide values for all the child task attributes. See [“To-Do List Attributes” on page 123](#).

After creating a to-do list, you can change the attribute values of the child tasks in the task detail page.

- c. If you want to remove a child task, click  corresponding to the child task.
 - d. If you want to add a child task, click .
 - e. If you have made any changes to the template, click **Update To-Do List Template** to save the changes to the template.
 - f. Click **Start To-Do List** to create and start the to-do list.
4. If you want to create a to-do list without using a saved to-do list template, click the **Create To-Do List Template** tab and provide values for the child task attributes. If required, you can change the attribute values of the child tasks after creating the to-do list. See [“To-Do List Attributes” on page 123](#).
 5. Click **Start To-Do List**.

Icon displayed in each child task row helps you identify which child task instances were successfully created.

Viewing and Updating To-Do Lists

In the task list, the child tasks are grouped under the parent task of the to-do list.

To view and update to-do lists

1. In the task list of the to-do list’s parent task, expand the parent task to view the child tasks of the to-do list.
2. Click on the task ID of the parent task to view the list of child tasks in the To-do Tasks panel in the task detail page.
3. Click the task ID of a child task in the To-do Tasks panel to view the task details or edit a child task. For information about what operations you can perform on a task, see [“Task Instance Operations” on page 107](#).

To-Do List Attributes

The attributes of the child tasks of a to-do list define the to-do list tasks.


Parent Task Attributes

| Attribute | Specifies... |
|----------------|---|
| Parent Task ID | ID of the parent task to which the to-do list is associated to. |

Child Task Attributes

| Attribute | Specifies... |
|-----------------------|---|
| <i>Task Type Name</i> | Task type name of the child task. |
| Name | Name of the child task. |
| Description | Description of the child task. |
| Custom Task ID | Custom ID of the child task instance. |
| Priority | Priority of the child task. |
| Expiry Date | Expiry date of the child task. |
| Assigned To | Name of the user to whom the child task is assigned. |
| Tags | Tags of the child task. |
| Mandatory | Whether the child task is mandatory. If a child task is specified as mandatory, the parent task cannot be marked as completed unless the mandatory child task status is Completed, Error, Canceled, or Expired. |

Task Charting and Analyzing Task Activities

webMethods Business Console provides task charting in the Task Activity panel of the **What's Happening Now** tab. The settings specified in the **Chart Settings** dialog box define the chart results for analyzing the task activities. Click  on the charts panel to specify the chart settings.










Editing Chart Settings

Define the chart settings in the Chart Settings dialog box.

| Chart Setting | Specifies... |
|---------------------------|--|
| Saved Search | <p>The task filter for chart results. The public and private saved searches that you defined in My webMethods are available for selection.</p> <p>Default is All My Tasks (Standard Task Inbox).</p> |
| Chart Type | <p>The type of chart.</p> <p>The following chart types are available for selection:</p> <ul style="list-style-type: none"> ■ Bar chart ■ Pie chart ■ Donut chart ■ Bubble chart ■ Tree chart <p>Default is Bar chart.</p> <p>When you point the mouse to a status on a chart, a tooltip appears indicating the number of tasks in the status.</p> <p>Note: The tooltip is not displayed for Tree charts.</p> <p>When you click on a status, a dialog box appears indicating the task IDs. You can click a task ID in the dialog box to view the task details page.</p> <p>Note: You cannot click a status on a Bubble chart and Tree chart to view the task IDs.</p> |
| Task Parameter | <p>The task data on which the task charting is based.</p> |
| Group By Task Type | <p>Whether the chart data is grouped by task type.</p> <p>The Group By Task Type option is not available for Pie chart and Donut chart. It is mandatory for Bubble chart and Tree chart.</p> |

Collaborating Task Activities

In **Activity Stream**, users can share comments, post attachment, view activities related to a task type or task instance. **Activity Stream** displays the activities related to the task type selected in **Work Stream**. The table below lists the operations you can perform in **Activity Stream**.

| Click... | To... |
|---|--|
|  | Refresh content in Activity Stream to view the latest changes. |
|  | Post a global comment or task-specific comment. |
|  | Create an instant task. |
|  | Attach one or more files to the task. You can attach up to three files to a task. The size of each file attachment must be less than 20MB. |
|  | Apply task management actions to the selected task. For more information, see “Task Actions” on page 111 . |
|  | Show older posts in Activity Stream. |
|  | Reply to a comment made for a task type. |
|  | Draft an email in the E-mail dialog box and send an email to the user, who wrote the comment. |
|  | Remove a comment from a task. |

Creating an Instant Task

Instant tasks are collaboration tasks that enable sharing of comments and attachments.

To create an instant task

1. Make sure the parent task for which you want to create a child task is enabled for collaboration.
2. In the task list or activity stream, select the parent task.

3. Select **Create Instant Task** action.
4. In the New Instant Task dialog box, specify the field values for the new task. See the field descriptions in [“New Instant Task” on page 127](#).
5. Click **Create New**.






New Instant Task

| Field | Description |
|-------------------------------|--|
| Instant Task Type | Select a task type for the instant task. |
| Name | Type a name for the task. |
| Description | Type a description for the task. |
| Priority | Select the priority for the task. |
| Expiry Date | Select the expiry date for the task. |
| Assign To | Select the user to whom you want to assign the task. |
| Queue Task Immediately | Select this option if you want the task to start immediately after creation. Otherwise, the task is deferred to start later. The task status is New if the task is not specified to start immediately. Immediately after the task starts, the task status transitions from New to Active . |
| Mandatory | Select this option if this is a mandatory task. If a task is specified as mandatory, the parent task cannot be marked as completed unless the mandatory child task status is Completed, Error, Canceled, or Expired. |

Managing Your Task Inbox

In the **Task Inbox** tab on Business Console title bar, you can view the tasks grouped by task type.

Operations you can perform in task inbox:

| Operation | Perform these steps... |
|--|---|
| View tasks grouped by task type | From the Task Inbox drop down menu, select My Inbox to view the tasks assigned to you, or select one of the saved searches to view the tasks for which you have permission to view. |
| Filter tasks | Select a task filter from the left panel. |
| Search for tasks instances of a task type | Provide the task ID on the task search field or use saved searches. For more information, see “Searching for Task Instances” on page 118 . |
| View task detail and perform actions | Click the task ID corresponding to the task instance in the task list. See “Task Instance Operations” on page 107 . |
| View the unaccepted tasks | Click  on the Business Console title bar. |
| View the tasks expiring today | Click  on the title bar. |
| Configure the task list columns | Select Configure Columns from the  Settings menu. You can configure to view the business data too. |
| Schedule task delegation | Select Schedule Delegation from the  Settings menu. |
| Set a task list as the default landing page | Select Set This As Landing Page from the  Settings menu. |
| Accept tasks | Click Accept corresponding to the task in the task list. |
| Perform these actions on a task: | See “Task Actions” on page 111 . |
| <ul style="list-style-type: none"> ■ Resume ■ Suspend ■ Assign To | |

Operation

Perform these steps...

- Accept For
- Resubmit
- Set Status
- Delete
- Delegate
- Remove Delegation
- Create Instant Task

8 Using Social Guidance for Task Execution

- Social Guidance in Business Console 132
- Endorsement Methods 132
- Endorsement Properties in My webMethods Server 133
- Networking with Task Experts 133
- Viewing Trending Information on Social Media 134

Social Guidance in Business Console

The social guidance feature in Business Console enables you to:

- **View experts** for a task type. You can view the list of experts for a task type in the Task Experts panel in **What's Happening Now** tab, task detail page, and process detail page.
- **Network with task experts** and improve task execution. You can email task experts or assign task instances to task experts. For more information, see [“Networking with Task Experts” on page 133](#).
- **Endorse users** based on their task expertise. When a user is endorsed for a task, the endorsement rating that the user gets is added to all the tags associated with the task of the user. For information about how user endorsements can be done, see [“Endorsement Methods” on page 132](#).

The social endorsement feature in Business Console is governed by the social guidance properties of the Task Engine available in My webMethods Server. See [“Endorsement Properties in My webMethods Server ” on page 133](#).

Use the **Do Not Show Endorsements** option in the Administration page to display or hide endorsements in the task detail pages and the Task Experts panel. For more information, see [“Configuring User Endorsement Rating” on page 27](#).

Endorsement Methods

Business Console identifies and tracks tasks experts of a task type based on the points a user receives for task instances.

User endorsements are possible through any of the following methods only if the `task.socialbpm.enabled` system property of the Task Engine is set to 1. For information about property setting, see [“Endorsement Properties in My webMethods Server ” on page 133](#).

- **Automatic user endorsement.** Task Engine endorses users automatically when a user completes a task.

Use `task.socialbpm.default.systemendorse.enabled` and `task.socialbpm.endorsement.rating` properties to enable automatic user endorsement.

- **Manual user endorsement.** Other users endorse task experts using the **Endorse** option in the **Summary** tab of the task detail page in Business Console.
 - Use the `task.socialbpm.enabled` property to enable user endorsement.
 - Use the **Maximum User Endorsement Rating** parameter in Business Console to define the maximum endorsement rating a user can grant to another user.

For example, if a user gets four stars, and **Maximum User Endorsement Rating** is set to five, the rating for the user can be calculated as $(4/5)*5$ (that is, $no_of_stars_received / max_endorsement_rating * max_endorsement_rating$). See [“Configuring User Endorsement Rating” on page 27](#).

- **Customized user endorsement.** Users are endorsed by using the web services.

Use the `task.socialbpm.customendorse.enabled` property to enable the usage of web services for user endorsements. For information about web services, see [“Using Services for Business Process Guidance” on page 135](#).

Endorsement Properties in My webMethods Server

Configure these social guidance properties of Task Engine available in My webMethods Server. Edit the properties in the `Software AG_directory\profiles\MWS_serverName\configuration\custom_wrapper.conf` file.

| Property | Description |
|---|---|
| <code>task.socialbpm.customendorse.enabled</code> | Specify 0 to disable endorsements through web services. Default value is 1 (enabled). |
| <code>task.socialbpm.enabled</code> | Specify 0 to disable all endorsement methods. That is, disable endorsement by other users, Task Engine, and web services. Default value is 1 (enabled). |
| <code>task.socialbpm.default.systemendorse.enabled</code> | Specify 0 to disable automatic endorsement by Task Engine. Default value is 1 (enabled). |
| <code>task.socialbpm.endorsement.rating</code> | Specify a value that Task Engine adds to a task tag rating when automatic endorsement is enabled. Default value is 1. |

Networking with Task Experts

The Task Experts panel on the **What’s Happening Now** tab provides you the capability to network with the task experts for the task type selected in Process Stream.

Operations you can perform:

- View profile of an expert

- Send email to an expert

For information about how experts are identified, see [“Using Social Guidance for Task Execution” on page 131](#).

For information about configuring the email server, see *Administering My webMethods Server*.

Viewing Trending Information on Social Media

Twitter Stream on the **What's Happening Now** tab provides the functionality to search the social networking site. You must enable the Twitter settings on the Administration page to view Twitter Stream. See [“Configuring Business Console with Twitter” on page 26](#).

By default, this panel does not display anything. If you select a task type in **Process Stream**, you can view the tweets pertaining to the selected task type name.

In Twitter Stream, you can view only 50 recent tweets pertaining to the keyword you searched, and make only 180 searches in an interval of 15 minutes. The "Rate limit exceeded" exception appears if you make frequent search requests.

9 Using Services for Business Process Guidance

| | |
|---|-----|
| ■ Overview | 136 |
| ■ Summary of Services Available for Business Process Guidance | 136 |
| ■ Summary of Data Structures | 137 |
| ■ Social Guidance Service URLs | 138 |
| ■ Extracting the WSDL for Social Guidance Services | 138 |
| ■ addKeyword | 139 |
| ■ addKeywords | 139 |
| ■ deleteKeyword | 139 |
| ■ deleteKeywords | 140 |
| ■ getKeyword | 140 |
| ■ listKeywords | 140 |
| ■ updateKeyword | 141 |
| ■ updateKeywords | 141 |
| ■ getTaskExpertList | 141 |
| ■ listSkillsByUser | 142 |
| ■ addTagsToTask | 142 |
| ■ deleteTagsFromTask | 143 |
| ■ listTagsByTask | 143 |
| ■ updateTaskTags | 143 |
| ■ endorseUser | 144 |
| ■ deleteEndorsementForUser | 144 |
| ■ endorseUserBasedOnTask | 144 |
| ■ Keyword | 145 |
| ■ Guidance | 145 |
| ■ Endorsement | 145 |

Overview

Services are available for enabling the following social guidance features for business processes:

- Endorse users based on task tags.
- Endorse user for a task.
- Remove all the endorsements from users.
- Retrieve a list of experts for a task.
- Retrieve the endorsements of a user.
- Create, update, and delete task tags.

Summary of Services Available for Business Process Guidance

The following services are available:

Keyword Management

| Service | Description |
|--------------------------------|---|
| addKeyword | Adds a new Keyword object to the database. |
| addKeywords | Adds new Keyword objects to the database. |
| deleteKeyword | Removes a Keyword object from the database. |
| deleteKeywords | Removes Keyword objects from the database. |
| getKeyword | Returns a Keyword object matching the input criteria. |
| listKeywords | Returns the Keyword objects matching the input criteria. |
| updateKeyword | Updates the name and type of a Keyword object. |
| updateKeywords | Updates the name and type of one or more Keyword objects. |

Task Guidance

| <u>Service</u> | <u>Description</u> |
|-----------------------------------|---|
| getTaskExpertList | Returns a list of recommended task experts identified by the specified tags, with the most recommended expert at the top of the list. |
| listSkillsByUser | Returns all the endorsements of a specified user. |

Task Tagging

| <u>Service</u> | <u>Description</u> |
|------------------------------------|--|
| addTagsToTask | Adds one or more tags to the specified task. |
| deleteTagsFromTask | Deletes all the tags of a specified task. |
| listTagsByTask | Lists all the tags of a specified task. |
| updateTaskTags | Updates the tags of a specified task. |

User Endorsement

| <u>Service</u> | <u>Description</u> |
|--|---|
| endorseUser | Endorses user for the specified task tags. |
| endorseUserBasedOnTask | Endorses user for task expertise. |
| deleteEndorsementForUser | Removes all the endorsements from a specified user. |

Summary of Data Structures

| <u>Element</u> | <u>Description</u> |
|-------------------------|---|
| Keyword | An object containing information about the ID, name, and type of a keyword. |

| Element | Description |
|-------------|--|
| Guidance | An object containing information about the name, rating, and user ID of an expert. |
| Endorsement | An object containing information about who endorsed the user, rating provided to the user, and the task tag ID for which the user is being endorsed. |

Social Guidance Service URLs

The social guidance services are hosted at the following endpoints on the machine where the Task Engine is installed.

```
http://hostName:port/services/bizPolicy/bizPolicyName
```

Where:

- *hostName* specifies the machine where My webMethods Server and the Task Engine are running.
- *port* specifies the port on which My webMethods Server listens for http requests. The default port is 8585, however, this port assignment is configurable. If you do not know which port your server uses, contact your My webMethods Server administrator.
- *bizPolicyName* specifies the name of the folder where the service is stored.
 - *socialendorsementbizpolicy* folder contains the *endorseUser*, *endorseUserBasedOnTask*, and *deleteEndorsementForUser* services.
 - *socialguidancebizpolicy* folder contains the *getTaskExpertList*, and *listSkillsByUser* services.

Extracting the WSDL for Social Guidance Services

To obtain the WSDL, log on to My webMethods Server as administrator and navigate to following URL:

```
http://hostName:port/services/bizPolicy/bizPolicyName?wsdl
```

Example

```
http://server:8585/services/bizPolicy/socialappendorsementbizpolicy?wsdl
http://server:8585/services/bizPolicy/socialendorsementbizpolicy?wsdl
http://server:8585/services/bizPolicy/socialguidancebizpolicy?wsdl
http://server:8585/services/bizPolicy/socialkeywordsbizpolicy?wsdl
```

addKeyword

Adds a new Keyword object to the database.

Input Parameters

keyword **Keyword** New Keyword object to be added.

Output Parameters

keywordID **Integer** Keyword ID of the newly added Keyword. Returns null if the new Keyword cannot be added.

addKeywords

Adds new Keyword objects to the database.

Input Parameters

keywords **Keyword[]** Array of new Keyword objects to be added.

Output Parameters

None.

deleteKeyword

Removes a Keyword object from the database.

Input Parameters

keyword **Keyword** Keyword object to be deleted.

Output Parameters

None.

deleteKeywords

Removes Keyword objects from the database.

Input Parameters

keywords **Keyword[]** An array of Keyword objects to be deleted.

Output Parameters

None.

getKeyword

Returns a Keyword object matching the input criteria.

Input Parameters

keyword **Keyword** The Keyword object containing:

- keyword ID

Or

- keyword name and keyword type

Output Parameters

Keyword **Keyword** The Keyword object matching the input criteria.

listKeywords

Returns the Keyword objects matching the input criteria.

Input Parameters

keywordType **String** Specify tag or skill.

Output Parameters

keyword **Keyword[]** An array of Keywords matching the input criteria.

updateKeyword

Updates the name and type of a Keyword object.

Input Parameters

keyword **Keyword** The Keyword object containing new values for keyword name and/or keyword type. The keyword ID cannot be changed.

Output Parameters

keywordID **Integer** The keyword ID of the Keyword object updated.

updateKeywords

Updates the name and type of one or more Keyword objects.

Input Parameters

keywords **Keyword[]** An array of Keyword objects containing new values for keyword name and/or keyword type. The keyword ID cannot be changed.

Output Parameters

None.

getTaskExpertList

Returns a list of recommended task experts identified by the specified tags, with the most recommended expert at the top of the list.

Input Parameters

tags **String** Comma-separated list of tags.

Output Parameters

guidance **Guidance[]** An array of Guidance objects representing the names, ratings, and user IDs of the experts of a specific task.

listSkillsByUser

Returns all the endorsements of the specified user.

Input Parameters

userId **String** User ID of the My webMethods Server user.

Output Parameters

endorsement **Endorsement[]** An array of Endorsement objects representing who endorsed the user, rating provided for the user, and the task tag ID for which the user is endorsed.

addTagsToTask

Adds one or more tags to the specified task.

Input Parameters

taskID **String** The unique identifier that the Task Engine assigns to the task.

tags **String** Comma-separated list of text to be used to define tags. No character limit enforced. Alphanumeric characters, spaces, underscores, and dashes are allowed.

Output Parameters

None.

deleteTagsFromTask

Deletes all the tags of a specified task.

Input Parameters

taskID **String** The unique identifier that Task Engine assigns to the task.

Output Parameters

None.

listTagsByTask

Lists all the tags of a specified task.

Input Parameters

taskID **String** The unique identifier that Task Engine assigns to the task.

Output Parameters

Tags **String[]** List of tags associated with the *taskID* .

updateTaskTags

Updates the tags of a specified task.

Input Parameters

taskID **String** The unique identifier that Task Engine assigns to the task.

tags **String** Comma-separated list of new tags for the task. No character limit enforced. Alphanumeric characters, spaces, underscores, and dashes are allowed.

Output Parameters

None.

endorseUser

Endorses user for the specified task tags. If you want to endorse an expert for a specific skill/tag, you need to first add the skill/tag using addKeyword.

Input Parameters

endorsedBy **String** ID of the user performing the endorsement. In case of system endorsement, 'SYSTEM' is stored in this parameter.

keywordNames **String List** List of task tags.

userID **String** ID of the My webMethods Server user being endorsed.

rating **Double** Rating for the expert user.

Output Parameters

None.

deleteEndorsementForUser

Removes all the endorsements from a specified user.

Input Parameters

userID **String** ID of the My webMethods Server user from whom all the endorsements must be removed.

Output Parameters

None.

endorseUserBasedOnTask

Endorses user for task expertise.

Input Parameters

| | |
|---------------|--|
| <i>rating</i> | Double Numeric rating for endorsing the user for all the tags associated with the task. |
| <i>taskID</i> | String ID of the task for which the user is being endorsed. |

Output Parameters

None.

Keyword

An object containing information about the ID, name, and type of a keyword.

| Element | Description |
|--------------------|---|
| <i>keywordID</i> | Integer Unique keyword ID. |
| <i>keywordName</i> | String Keyword name. |
| <i>keywordType</i> | String Keyword type. Keyword type can be either <code>skill</code> or <code>tag</code> . |

Guidance

An object containing information about the name, rating, and user ID of an expert.

| Element | Description |
|--------------------|---|
| <i>displayName</i> | String Expert user name. |
| <i>rating</i> | Double Expert user rating. |
| <i>userId</i> | String User ID of the expert user on My webMethods Server. |

Endorsement

An object containing information about who endorsed the user, rating provided to the user, and the task tag ID for which the user is being endorsed.

| Element | Description |
|---------------------|---|
| <i>endorsedBy</i> | String Who endorsed the user. Contains the user ID of the person who endorsed or 'SYSTEM' if endorsed by the system. |
| <i>endorseCount</i> | Double Rating provided to the user for the task tag. |
| <i>keywordId</i> | Integer Task tag ID for which the user is being endorsed. |

A Admin User Reference





Only users with administrator privileges can perform the Business Console configuration tasks by using the Administration menu on the masthead.






| <u>To...</u> | <u>Use this menu item...</u> | <u>Do...</u> |
|---|------------------------------------|---|
| Configure the Integration Server, Task Engine, and AgileApps Cloud to which Business Console must connect | Administer Business Console | See “Configuring Servers for Business Console” on page 24. |
| Configure a Twitter account for Business Console | Administer Business Console | See “Configuring Business Console with Twitter” on page 26. |
| Configure user endorsement | Administer Business Console | See “Configuring User Endorsement Rating” on page 27. |
| Configure to-do lists | Administer Business Console | See “Configuring To-Do List Setting” on page 27. |
| Configure task type display | Administer Business Console | See “Configuring Task Type Setting” on page 28. |
| Configure Work Stream | Administer Business Console | See “Configuring Work Stream” on page 29. |
| Configure AppSpace Settings | Administer Business Console | See “Configuring AppSpace Settings” on page 29 |
| Configure the Analytical Engine for Business Console | Administer Business Console | See “Configuring the Analytical Engine for Business Console” on page 30 |
| Configure Column Settings in Work Stream | Administer Business Console | See “Setting the Maximum Number of Columns in Work Stream” on page 31 |



| <u>To...</u> | <u>Use this menu item...</u> | <u>Do...</u> |
|---------------------------------------|-----------------------------------|--|
| Manage task types using My webMethods | Administer Tasks | See “Managing Task Types Using My webMethods” on page 34. |
| Customize the user interface | Customize Business Console | See “Customizing Business Console” on page 34. |
| Program user endorsement | | Use the web services available for business process guidance. See “Configuring User Endorsement Rating” on page 27 and “Using Services for Business Process Guidance” on page 135. |




B Non-Admin User Reference

The operations you can perform in Business Console depends on the access and the functional privileges assigned to you.

| To... | Navigate to... | Do... |
|--|---|---|
| View the unaccepted tasks | Masthead | Click  . |
| View the tasks expiring today | Masthead | Click  . |
| View case types, process types, and task types | What's Happening Now > Work Stream | See "About Work Stream" on page 85. |
| View case instances grouped by case type | What's Happening Now > Work Stream | Click on the case type bar. |
| View case instances grouped by saved search (keylinks) | What's Happening Now > Work Stream | Click  on the case type bar to view the customized keylinks. |
| Customize case keylinks (using saved searches) | What's Happening Now > Work Stream | Select the Customize Keylinks option on the case type bar and configure the keylinks. See "Customizing Case Keylinks" on page 96. |
| Search for cases in case list | What's Happening Now > Work Stream | <ol style="list-style-type: none"> 1. Expand the case type bar. 2. Use the search field to search cases. See "Searching for Case Instances" on page 96. |
| Configure case instances | What's Happening Now > Work Stream > Case List | Click  Settings . |

| To... | Navigate to... | Do... |
|--|--|--|
| View case instance details such as attachments and comments. | What's Happening Now > Work Stream > Case List | Click the case number of the case instance and select the Summary tab. |
| View business data of case instance | What's Happening Now > Work Stream > Case List | Click the case number of the case instance and select the Business Data tab. |
| Add comments to a case | What's Happening Now > Work Stream > Case List > Summary or What's Happening Now > Activity Stream | <ol style="list-style-type: none"> 1. Type the comment for the case. 2. Click Post. |
| View/hide attachments of a case | Work Stream > Case List > Case Detail | Click  on the vertical side on the case details page. |
| View/hide task instances belonging to a case | Work Stream > Case List > Case Detail | Click  on the vertical side on the case details page. |
| View/hide the activities of a case | Work Stream > Case List > Case Detail | Click  on the vertical side on the case details page. |
| View/hide process instances belonging to a case | Work Stream > Case List > Case Detail | Click  on the vertical side on the case details page. |
| View/hide hours logged for a case | Work Stream > Case List > Case Detail | Click  on the vertical side on the case details page. |
| View process instances grouped by status (Keylinks) | What's Happening Now > Work Stream | <ol style="list-style-type: none"> 1. Click on the process bar to view the keylinks 2. Click on the keylink pertaining to the status |

| To... | Navigate to... | Do... |
|---|--|--|
| Filter process instances | What's Happening Now > Work Stream | <p>of process instances you want to view.</p> <ol style="list-style-type: none"> 1. Click on the process bar to view the keylinks. 2. Click on the keylink pertaining to the status of process instances you want to view. 3. Search and view the process instances in the process list. |
| View process instance details | What's Happening Now > Work Stream | <ol style="list-style-type: none"> 1. Click on the process bar to view the keylinks. 2. Click on the keylink pertaining to the status of process instances you want to view. 3. Search and view the process instances. 4. Click on the custom ID link corresponding to the process instance, and view the process instance details in the process detail page. |
| View process diagram | Work Stream > Process List > Process Detail | Click the Diagram tab on the process detail page. |
| View/hide task instances belonging to a process | Work Stream > Process List > Process Detail | Click  on the vertical side on the process detail page. |
| View/hide the activities of a process | Work Stream > Process List > Process Detail | Click  on the vertical side on the process detail page. |

| To... | Navigate to... | Do... |
|--|---|--|
| View/hide attachments of a process | Work Stream > Process List > Process Detail | Click  on the vertical side on the process detail page. |
| View task instances grouped by task type | What's Happening Now > Work Stream | Click on the task type bar. |
| Create and start a task instantly | Instant Task tab on the left margin | See "Starting Tasks" on page 116. |
| Schedule task | Instant Task tab on the left margin or What's Happening Now > Work Stream | See "Scheduling Tasks" on page 113. |
| Schedule task delegation | What's Happening Now > Work Stream > Task List or Settings on My Inbox. | See "Scheduling Task Delegations" on page 115. |
| View task instances grouped by saved search (Keylinks) | What's Happening Now > Work Stream | Click  on the task bar to view the customized keylinks. |
| Customize task keylinks (using saved searches) | What's Happening Now > Work Stream | Select the Customize Keylinks option on the task type bar and configure the keylinks. See "Customizing Task Keylinks" on page 118. |
| Search for tasks in task list | What's Happening Now > Work Stream | <ol style="list-style-type: none"> 1. Expand the task type bar. 2. Use the search field to search tasks. See "Searching for Task Instances" on page 118. |
| Create and use to-do lists | What's Happening Now > Work Stream | See "Using To-Do Lists" on page 120. |
| Configure task instances | What's Happening Now > Work Stream > Task List | Click  Settings . |

| To... | Navigate to... | Do... |
|--|--|--|
| View mandatory child tasks | What's Happening Now > Work Stream > Task List | Use Configure Columns settings to display the Is Mandatory column details in the task list. |
| View task instance details such as tags, attachments, comments, experts, and audit information of a task | What's Happening Now > Work Stream > Task List | Click the task ID link of the task instance and select the Summary tab. |
| View business data of task instance | What's Happening Now > Work Stream > Task List | Click the task ID link of the task instance and select the Business Data tab. |
| Change task priority | What's Happening Now > Work Stream > Task List > Summary | Select the priority from the drop-down list. |
| Tag tasks | What's Happening Now > Work Stream > Task List > Summary | Type the new tag in the Tags field. |
| Create an instant task | What's Happening Now > Work Stream > Task List or What's Happening Now > Activity Stream | Click Create Instant Task option. |
| Add comments to a task | What's Happening Now > Work Stream > Task List > Summary or What's Happening Now > Activity Stream | <ol style="list-style-type: none"> 1. Type the comment for the task. 2. Click Post. |
| Add attachments to a task | What's Happening Now > Work Stream > Task List > Summary or What's Happening Now > Activity Stream | <ol style="list-style-type: none"> 1. Select the task instance in task list, and type your comment for the task. 2. Click  Add Attachments. 3. Click Attach. |

| To... | Navigate to... | Do... |
|---|---|---|
| Reply to a comment, email the user who commented for a task, or delete a comment | What's Happening Now > Activity Stream | See “Collaborating Task Activities” on page 126. |
| Endorse users for a task | What's Happening Now > Work Stream > Task List > Summary | See “Configuring User Endorsement Rating” on page 27 and “Using Services for Business Process Guidance” on page 135. |
| Visualize task data and analyze task activity | What's Happening Now > Task Activity | See “Task Charting and Analyzing Task Activities” on page 124. |
| View user profile, roles, and group memberships | Update Profile option in the administration menu | See “Viewing and Updating Your Profile” on page 19. |
| Edit user profile | Update Profile option in the administration menu | See “Viewing and Updating Your Profile” on page 19. |
| View and filter trending information related to tasks on social media | What's Happening Now > Twitter Stream | See “Viewing Trending Information on Social Media” on page 134. |
| Network with task experts | What's Happening Now > Task Experts | See “Networking with Task Experts” on page 133. |
| Filter and view tasks, accept tasks, delegate tasks, or remove delegation from tasks in your task inbox | Task Inbox tab | See “Managing Your Task Inbox” on page 127. |
| Customize task list in Work Stream and Task Inbox | What's Happening Now > Work Stream > Task List or Task Inbox > Task List | Click  Settings and use the Configure Columns option and select the columns to be displayed. |


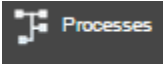
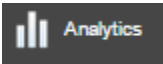








To...




Navigate to...

Do...

You can also include the business data fields to Task List.

C Icon Reference

| Icon/Image | Click to... |
|---|--|
|  | Collaborate and manage business processes in the What's Happening Now tab (Home). |
|  | View dashboards for process overview, step instances, and process instances. |
|  | View process metrics, identify problems, and take corrective actions. For more information, see <i>Working with Business Process Dashboards</i> . |
|  | View the unaccepted tasks. |
|  | View the tasks that are expiring today. |
|  | View/hide the case type information in Work Stream. |
|  | View/hide the process type information in Work Stream. |
|  | View/hide the task type information in work Stream. |
|  | View/hide the keylinks of a case type or task type in Work Stream. |
|  | <ul style="list-style-type: none"> ■ View/hide task instances in case details and process details page. ■ Create instant task in Activity Stream. |
|  | <ul style="list-style-type: none"> ■ View/hide Activity Stream panel in case details and process details page. ■ View/hide Comments panel in task detail page. |

| Icon/Image | Click to... |
|---|--|
|  | <ul style="list-style-type: none">■ View/hide Attachments panel.■ Add attachments. |
|  | <ul style="list-style-type: none">■ Configure setting or perform actions in:<ul style="list-style-type: none">■ Case list■ Process list■ Task list■ Charts■ Task Inbox |
|  | Refresh content to display the real time changes. |

D Permission Reference

Business Console users require access and functional privileges for Task Engine, and the Access Control List (ACL) privileges for Integration Server and Monitor.

Important: A user must be a member of the My webMethods Users role to log into Business Console.

Users in the My webMethods administrator role can grant or deny access privileges and functional privileges for users, groups, or roles. User permissions for a resource type are set in the **Navigate > Applications > Administration > System-Wide > Permissions Management** page in My webMethods.

Use:

- Resource type permissions to define which resource type a user, group, or role can manage.
- Access privileges to define what a user, group, or role can view.
- Functional privileges to define what a user, group, or role can modify. Without the appropriate access privileges, the functional privileges are of no use.

Note: You must re-login to Business Console, if any permission is changed.

The sections below list the access privileges, functional privileges, and resource type permissions a user requires for Task Engine to perform operations in Business Console. For more information about setting ACLs and user permissions, see *webMethods Integration Server Administrator's Guide*, *webMethods Task Engine User's Guide*, and *webMethods Monitor User's Guide*.

Basic Permissions

This section lists the minimum access privileges and task type permissions you need to view process types, task types, task lists, task details, business data, audit information, charts, task activities, unassigned tasks, tasks expiring today, task inbox, and task experts.

Access Privilege Required

- Access Privileges > Monitoring > Business > Tasks > Task List Management
- Access Privileges > Monitoring > Business > Tasks > Task Charts

Task Type Permissions Required

- Tasks Administration > Task Administration
- Task Management
- Task Application Root Page

Access Privilege Required

- Access Privileges > Monitoring > Business > Tasks > My Inbox

Task Type Permissions Required**Permissions For Task Management**

This section lists the task type permissions and access privileges you need in addition to the basic permissions to perform task management operations.

Task Management Operation**Permissions Required**

Perform task actions

Task Type Permission

Task Management > *Specific permissions for task actions*

Access Privilege

Business Console > Access Privileges > Tasks > *Specific permissions such as Task List Actions and Task Details Actions*

Start a task

Task Type Permission

Tasks Administration > Task Administration > Queue New Task Instance

Tasks Administration > Queue New Task Instance

Filter and view tasks, accept tasks, view assigned tasks, delegate tasks, or remove delegation from tasks in the **Task Inbox** tab

Task Type Permission

Task Application Root Page > Task Inbox Page

Access Privilege

Business Console > Access Privileges > Tasks > Task Inbox

Business Console > Access Privileges > Tasks > Inbox Filters

Permissions For Task Collaboration

This section lists the permissions you need in addition to the basic permissions to perform task collaboration operations.

| Task Management Operation | Privileges Required | Task Type Permissions Required |
|---|---|--|
| Perform collaborative task actions such as creating instant tasks, endorsing users, and networking with users | | Task Collaboration > <i>Specific permissions</i> |
| Create to-do lists | Functional Privilege Business Console > Functional Privileges > To-Do Lists > Create To-Do List | Task Collaboration > <i>Specific permissions</i> |
| Reply to a comment or delete a task comment | | Task Comments > <i>Specific permissions</i> |
| Use email option in Activity Stream | Access Privilege Access Privileges > Administration > Business > Tasks > Task Email Listener Administration | |

Permissions For Process Management

You need the following privileges in addition to the basic permissions to view process lists, process instance details, and diagrams of processes with task steps:

- Access Privileges > Monitoring > Business > Process Instances
- Access Privileges > Administration > Business > Business Processes
- Functional Privileges > Business Monitoring > Processes > *Specific permissions*
- Business Console > Access Privileges > Processes > *Specific permissions*

Permissions For Customizing Business Console

You need the following functional privilege in addition to the basic permissions to customize title and tab labels:

- Business Console > Functional Privileges > Business Console Customization > Allow Business Console Customization

Permissions For Using Business Console Gadgets

You need the following access permissions in addition to the basic permissions to use a Business Console gadget for customizing Business Console AppSpaces:

- Gadget > Basic > View object

For assigning gadget permissions to users, groups, or roles, see [“Assigning Gadget Access Permissions” on page 82](#).

Permissions For Using AppSpaces and AppSpace Groups

You need the following access permissions in addition to the basic permissions:

- AppSpace > Basic > View Object
- AppSpace Container > Basic > View Object

For assigning AppSpace permissions to users, groups, or roles, see [“Assigning AppSpace and AppSpace Group Access Permissions” on page 82](#).

Additionally, you need the following access privilege:

- Business Console > Access Privileges > AppSpaces > AppSpace

Permissions For AgileApps Cloud Case Management

Cases types are defined in AgileApps Cloud. For more information about accessing cases in Business Console, see [“Managing Cases” on page 90](#).

You need the following access privilege to access cases in Business Console:

- Business Console > Access Privileges > Cases

Additionally, you need the following access privileges to perform case management operations:

- Business Console > Access Privileges > Cases > Summary
- Business Console > Access Privileges > Cases > Case List Actions
- Business Console > Access Privileges > Cases > Case Details Actions

Permissions For Accessing Analytics, Processes, and What's Happening Now Tabs

You need the following access privileges to access tabs in Business Console:

- Business Console > Access Privileges > General > *Specific permissions to access tabs*