Working with webMethods Business Console

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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 case management. For more information, see AgileApps 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 storage locations for services on webMethods Integration Server, using the convention *folder.subfolder:service* .
UPPERCASE	Identifies keyboard keys. Keys you must press simultaneously are joined with a plus sign (+).

Convention	Description
Italic	Identifies variables for which you must supply values specific to your own situation or environment. Identifies new terms the first time they occur in the text.
`Monospace font`	Identifies text you must type or messages displayed by the system.
{ }	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 (...).

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- 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.

1 Overview

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

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 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. The web-based interface launched using My webMethods Server can be customized by using the options provided on the user interface or by using the REST APIs.

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 on selection of a tab in Business Console.

In Business Console...	You can...
Home > What's Happening Now	■ 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	■ Search, view, and execute tasks assigned to you either directly to your user account, or indirectly, through a role or group that you are a member of.
Home > AppSpace	■ Create new customized AppSpaces using gadgets. ■ Group AppSpaces and enable role-based access. ■ Edit AppSpaces and configure the gadgets used in the AppSpace. ■ Use a customized AppSpace instead of the default What's Happening Now page.
Processes	■ View process diagram with interactive step metrics. ■ View process instance details, step details, and rule violations. ■ View data comparison metrics. For more information, see *webMethods Optimize User's Guide*.

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

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 17.

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	■ webMethods Task Engine ■ webMethods Integration Server ■ My webMethods Server ■ webMethods Database Component Configurator
webMethods process and task management	■ webMethods Task Engine ■ webMethods Process Engine ■ webMethods Integration Server ■ My webMethods Server ■ webMethods Monitor ■ webMethods Database Component Configurator
AgileApps case management	■ AgileApps ■ webMethods Integration Server ■ My webMethods Server
AgileApps case management along with webMethods process management	■ AgileApps ■ webMethods Task Engine

For enabling...	Install and configure...
	■ webMethods Process Engine ■ webMethods Integration Server ■ My webMethods Server ■ webMethods Monitor ■ webMethods Database Component Configurator
webMethods process management using **webMethods Optimize** in **Processes** tab	■ 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*.
Business process analysis in **Analytics** tab	■ 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*.

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 Roles to Users

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

To assign AgileApps role to users

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

      Make sure to provide the exact AgileApps 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 role to My webMethods Server users.
   a. Navigate to **Applications > Administration > System-Wide > User Management > Roles**.
   b. Search for the AgileApps 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.

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

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	URL of the Integration Server that Business Console must connect to. For example, `http://localhost:5555`. Make sure that Process Engine is configured in the Integration Server. **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 23.
Task Engine URL	URL of the Task Engine that Business Console must connect to. For example, `http://localhost:8585`. Make sure you have configured the following with Task Engine: ■ My webMethods Server ■ My webMethods ■ Monitor **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 23.
AgileApps URL	URL of the AgileApps sever that Business Console must connect to. Make sure you have configured AgileApps with My webMethods Server.

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 24.

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.

Fields	Description
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 24.
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 23.

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 81.

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 ID while performing another to-do list creation operation.
Allow tags for to-do list	Whether or not you can use tags for to-do lists. Using tags, you can search the to-do lists or the parent task of to-do lists. You can view the tag of a to-do list in the task detail page of the to-do list task.

Field	Specifies...
Default tag for to-do list	The default tag for to-do lists.
Enable to-do list polling	Whether or not to poll Task Engine for the status of to-do lists. 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. 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.

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.
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	Specify...
Maximum gadgets allowed per AppSpace	A numeric value for the maximum number of gadgets allowed in an AppSpace. The default value is 15.
Select your default landing page	An AppSpace to set as the landing page.

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.

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.

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.

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*.

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	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.

To customize...	Perform these steps...
	4. Click **Reset to Default**, if you want to retain the default logo.
Masthead Color	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	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	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. 3. Select a theme and click **Apply** to apply the new theme to the masthead.
Gadgets	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.

To customize...	Perform these steps...
Landing page	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	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 33
Editing AppSpaces	"Editing AppSpace Using Gadgets" on page 34
Customizing gadgets	"Customizing Business Console" on page 30
Managing AppSpace groups	"Managing AppSpace Groups" on page 44
Customizing process details page using gadgets	"Customizing Process Details Using Gadgets" on page 44
Customizing task details page using gadgets	"Customizing Task Details Using Gadgets" on page 45
Creating gadgets using Software AG Designer	*webMethods CAF and OpenCAF Development Help*
Assigning gadget permissions	"Assigning Gadget Access Permissions" on page 45
Assigning AppSpace permissions	"Assigning AppSpace and AppSpace Group Access Permissions" on page 46

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 AppSpace Configuration dialog appears.

2. Specify the title, group (optional), type (internal), and alias (optional) for the AppSpace.

   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 36.

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. For information about the built-in gadgets, see "Understanding Built-in Gadgets" on page 39.

7. Configure each gadget in the AppSpace, see "Editing AppSpace Using Gadgets" on page 34.

8. To change the title, group, type (internal), and layout of 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. For information about built-in gadgets, see "Understanding Built-in Gadgets" on page 39.
   - 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 change the title, group, type (internal), or the layout of the AppSpace, click **Configure**.
   - To configure each gadget in the AppSpace, click corresponding to the gadget.
     - Select **Gadget Settings** to specify the gadget setting.

       For configuring a built-in gadget, see "Understanding Built-in Gadgets" on page 39. 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
       - 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.

Viewing an AppSpace in a Web Browser

You can directly view an AppSpace in a web browser. Typically, you should only perform this action to test an AppSpace after creating it.

To view an AppSpace in a web browser

1. As system administrator, log on to My webMethods Server.
2. Navigate to **Folders > Custom Applications > Business Console Dashboard Container**.
3. Select an AppSpace.
4. In the **Aliases** field, click **Add**, and then specify an alias name for the AppSpace.
5. Open an instance of a web browser and specify the URL of the AppSpace in the following format:

   `http://`*`host`*`:`*`port`*`/business.console.gadgets#/bcdashboard/`*`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 37.

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

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 36.

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 38.
- Deploying an AppSpace using the Install Option. See "Deploying an AppSpace using the Install Option" on page 38.
- Using the **Content Import/Export** option in My webMethods Server. See "Importing an AppSpace to My webMethods Server " on page 39.

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 36.

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 36.
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 36.
9. Click **Next**.

Understanding Built-in Gadgets

This section describes the built-in gadgets available for customizing Business Console AppSpaces. The Add New Gadget dialog lists the built-in gadgets under the following categories:

- Business Console - Processes. For a description of the process related built-in gadgets, see " Process Related Gadgets" on page 40.
- Business Console - Tasks. For a description of the task related built-in gadgets, see "Task Related Gadgets" on page 41.
- Business Console - Common. For a description of the common built-in gadgets, see "Common Gadgets" on page 43.
- Gadget Samples. This option is available only if the system administrator for My webMethods Server has installed the gadget samples. For instructions to install sample gadgets, see "Installing Sample Gadgets" on page 46.

  Important: Sample gadgets are not certified and supported by Software AG.

Process Related Gadgets

Built-in Gadget	Description	Gadget Setting
Process Comments	Displays the comments related to the specified process instance.	**Instance ID** of the process for which the comments must be retrieved.
Callable Processes	Displays the callable processes of the specified parent process.	■ **Instance ID** of the parent process for which the callable processes must be retrieved. ■ **Callable Process Label** specifies the title to use for the gadget.
Process Header	Displays the header panel containing details such as the process ID, actions, status, and duration of the specified process.	**Instance ID** of the process for which the process header details must be retrieved.
Process Diagram	Displays the process diagram of the specified process.	**Instance ID** of the process for which the process diagram must be retrieved.
Process Summary	Displays the summary details of the specified process.	■ **Instance ID** of the process for which the process details must be retrieved. ■ **Summary Tab Label** specifies the name to use for the **Summary** tab. ■ **Diagram Tab Label** specifies the name to use for the **Diagram** tab.
Process Tasks	Displays the task instances of the specified process.	■ **Instance ID** of the process for which the task instances must be retrieved. ■ **Tasks Label** specifies the title to use for the gadget.
Process Timeline Diagram	Displays the timeline diagram of the specified process.	**Instance ID** of the process for which the timeline diagram must be retrieved.

Task Related Gadgets

Built-in Gadget	Description	Gadget Setting
Task Charts	Displays the task charts.	■ **Maximum Legends Count** to specify the number of legends chart can use to depict its entities. See "Editing Chart Settings" on page 85 for more information to edit chart settings.
Task Inbox	Displays the specified task inbox.	■ **Inbox** to view. Select **My Inbox** to view the tasks assigned to you, or select one of the task types. ■ **Select Saved Search** to select a saved search for viewing the tasks.
Task Audit	Displays the audit information of the specified task.	**Instance ID** of the task to be audited.
Task Business Data	Displays business data of the specified task.	■ **Instance ID** to specify the task for which the business data must be retrieved. ■ **Task type name** of the task. ■ **Task application name** of the task application which contains the task. ■ **Finish URL** (Optional) URL to which the task application must return to after the task is completed. This information must be handled by the task application. ■ **Show Gadgets for Business Data** Select to replace the existing CAF/OpenCAF portlet with the gadget. A gadget URL must be defined while creating a task type in Software AG Designer

Built-in Gadget	Description	Gadget Setting
		for the gadget to replace the existing CAF/OpenCAF portlet.
Task Comments	Displays the comments provided to the specified task.	**Instance ID** of the task for which the comments must be retrieved.
Task Experts	Displays the list of task experts recommended for the specified task tags.	■ **Tags** specifies the task tags for retrieving a list of recommended task experts. ■ **Collapsable** specifies whether or not the list of task experts must be collapsable.
Task Header	Displays the task details header panel of the specified task. The gadget contains the parent task ID, priority, status, duration, and the task action options for the specified task.	**Instance ID** of the task for which the task header details must be retrieved.
Task Summary	Displays the fields in the task summary tab of the specified task.	■ **Instance ID** of the task for which the task summary must be retrieved. ■ **Summary Tab Label** specifies the name to use for the **Summary** tab. ■ **Business Data Tab Label** specifies the name to use for the **Business Data** tab. ■ **Show Gadgets for Business Data** Select to replace the existing CAF/OpenCAF portlet with the gadget. A gadget URL must be defined while creating a task type in Software AG Designer for the gadget to replace the existing CAF/OpenCAF portlet.
Task Calendar	Displays a calendar marked to identify the days when you have	None.

Built-in Gadget	Description	Gadget Setting
	scheduled tasks and to search for tasks based on their date property. See "My Calendar" on page 76.	

Common Gadgets

Following gadgets are common for processes and tasks.

Built-in Gadget	Description	Gadget Setting
Global Activity Stream	Displays the activities of all task types.	None.
Attachments	Displays the attachments of the specified process type or task type.	■ **Type** to select one of the following: ■ **Process** ■ **Task** ■ **Instance ID** of the process type or task type.
Instance List Management	Displays the process list or task list based on the gadget setting.	■ **Type** to select one of the following: ■ **Process** ■ **Task** ■ **Name** of the process type or task type. ■ **Gadget label** specifies the title to use for the gadget. ■ **Select a saved search** to select a saved search for viewing tasks. ■ **Show instance details** to click process instances or task instances and view details. ■ **Show only my tasks** to view tasks that are associated with you. ■ **Show completed tasks** to view tasks that are completed. By

Built-in Gadget	Description	Gadget Setting
		default, completed tasks are not shown.
People Picker	Displays the users listed in the active directories configured on My webMethods Server. The search is performed across users, groups, and roles.	**No. of users to display per page** Specifies the number of users to list per page.
Work Stream	Displays the list of process types and task types. This gadget enables you to customize the process details page and task details page.	None.

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 34.
- 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 34.
5. Click **Save** to save the changes to the customized process 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 34.
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

Work Stream organizes projects related to:

- AgileApps 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 48.

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	■ View, filter, 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	■ View, filter, 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
	■ Hide process type ■ Pin process type
Tasks	■ View, filter, search task types ■ 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

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. For more information, see the AgileApps documentation.

Only users with AgileApps role membership can work on cases in Business Console. For more information, see "Assigning AgileApps Roles to Users" on page 18. Alternatively, to view and manage cases in Business Console, you can configure AgileApps as a Service Provider in My webMethods Server. For more information, see "Configuring AgileApps as a Service Provider to Access Cases" on page 52.

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 58. 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 58.

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 57.

To perform actions on a case using:

- Case list. See "Case List Operations" on page 53.
- Case details page. See "Case Instance Operations" on page 54.

Configuring AgileApps as a Service Provider to Access Cases

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

To configure AgileApps 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.samlsso.useSAMLResponse=true
   ```

3. Restart My webMethods Server.

4. Register AgileApps 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.

   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 documentation.

6. Specify the AgileApps 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.

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.

Operation	**Description**
Perform case actions such as Assign to User and Delete	See "Case Actions" on page 57.
Search for case instances	See "Searching for Case Instances" on page 58.
Create a case instance	See "Starting Cases" on page 57.
Configure case list columns	Use the **Configure Columns** settings.
Claim cases	See "Claiming Cases" on page 55.
Assign cases	See "Assigning Cases" on page 56.
View case instance details	Click the case number corresponding to the case instance in the case list. See "Case Instance Operations" on page 54.

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 54.
View task instances, process instances, 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 tasks	See "Adding Tasks to Case Instances" on page 56.
Perform case actions such as Assign to User and Delete	See "Case Actions" on page 57.
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
Case Type	The case type of the case instance.

Property	Description
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.
Description	Description for the case.
Subject	Subject of the case.
Activities	List of task instances associated with the case instance. You can add new tasks to the case instance. See "Adding Tasks to Case Instances" on page 56.
Workflows	List of process instances associated with the case instance. These process instances are defined in AgileApps for the case. You can click Start or Stop to start/stop each process instance.
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.

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 Tasks to Case Instances

The Activities panel in the case details page allows you to add tasks to a case. For information about how to perform actions on a task associated with a case, see " Actions in a Case Task" on page 57.

To add tasks 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 task.

   The Add New Task dialog appears.
6. Select one of the following:
   - **Single Step**. This option allows you to create the new task with minimum details.
   - **Task Form**. This option allows you to specify more details for the new task.
7. Enter values in the fields for the task.

8. Click **Create Task**.

Actions in a Case Task

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

To perform an action on a task

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

Action	Use this action to...
Assign to User	Assign the task to a user.
Delete	Delete the task.
Complete	Change the task 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.
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.
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.

Click...	To...
	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

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 62.

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 64.
- 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
Process type name	Name of the process type or process model of the process instance.
Process instance ID	ID of the process instance.
Status	Status of the process instance. For more information, see "Process Instance Statuses" on page 65.

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

You can view the Business Rules decision entities that are part of the business processes on the process details page. Before you can get started, you need a My webMethods user account with permission to read application pages, and the Business Rules User Interface must be 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 Business Rules decision entities

1. Click on the left side vertical bar of the process details page to show the list of decision entities that are part of the business process instance the details of which you are viewing. The **Business Rules** list displays the name of the rule project, the name of the decision entity, and the type of the decision entity.

   Note: With the current version, you can only monitor decision tables.

2. In the **Business Rules** list, select the decision entity you want to view.

The decision entity is displayed in the **Decision Entity** details panel in read-only mode. In addition, you can see the processing mode and description of the decision entity. To show or hide this information, click on the left side vertical bar.

To open the decision entity in the Business Rules User Interface on My webMethods Server, click in the upper right corner.

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

Process Status	Determines
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: ■ Failed (Escalated) ■ Suspended ■ Resumed ■ Submitted

7 About Tasks

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 79.

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 79.

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 87 and "Using To-Do Lists" on page 81.

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 73.

Manage tasks using:

- Task lists. See "Task List Operations" on page 68.
- Task detail page. See "Task Instance Operations" on page 69.

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 74 and "Task Priority" on page 73.
Schedule a task	See "Scheduling Tasks" on page 75.
Start a task	See "Starting Tasks" on page 77.

Operation	Description
Search for task instances	s See “Searching for Task Instances” on page 79.
Perform task actions such as Resume, Suspend, Assign To, Accept For, and Resubmit.	See “Task Actions” on page 73.
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 87.
Use to-do lists	See “Using To-Do Lists” on page 81.
View task instance details	Click the task ID corresponding to the task instance in the task list. See “Task Instance Operations” on page 69.

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 71.
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.

Operation	Description
Perform task actions such as Resume, Suspend, Assign To, Accept For, and Resubmit.	See "Task Actions" on page 73.
Change the schedule of a task	See "Rescheduling Tasks" on page 75.
Create or view child tasks	See "Creating an Instant Task" on page 87.
Create or view to-do lists	See "Using To-Do Lists" on page 81.
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 73.
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 25.
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.
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.

Operation	Description
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.
Task Type	The task type name of the task instance.
Task ID/Custom ID/Task Name	One of the following appears based on the selected property in the **Display Name** field in the Administration page. ■ 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 73.
Status	Status of the task. See "Task Status" on page 74.
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.
Last modified by and date	By whom and when was the task last modified.
Name	Name of the task.

Property	Description
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
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 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.

Action	Use this action to...
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.
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.

Task Status	Description
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 76.

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 77. For information about rescheduling a task, see "Rescheduling Tasks" on page 75.

  > **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 77.
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	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 71.
View the current month if you have scrolled to other months	Click **Today**.
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.

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 78.
- **Start Task** option on a task type bar on **Work Stream**. See "Using Start Task Option" on page 78.

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 78.

   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 78.

   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 80.

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	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	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. 4. Click **Go**.
Modify a saved search	1. Click ▼ in the search field of a task list. 2. Click the **Saved Searches** tab.

Action	Perform these steps...
	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	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 25.

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	■ "Creating To-Do List Templates" on page 82 ■ "Viewing, Updating, or Deleting To-Do

To...	You need this functional privilege...	See...
		List Templates” on page 83
Create a to-do list	Create To-do List	■ “Creating To-Do Lists” on page 83 ■ “Viewing and Updating To-Do Lists” on page 84
View to-do list template	Use Public To-do List Template	“Viewing, Updating, or Deleting To-Do List Templates” on page 83

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 84.
   - 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 84.
   - 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 84.

      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 84.

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 69.

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...
Task Type Name	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 Searches	The task filter for chart results. The public and private saved searches that you defined in My webMethods are available for selection.

Chart Setting	Specifies...
	Default is **All My Tasks (Standard Task Inbox)**.
Chart Type	The type of chart. The following chart types are available for selection: ■ Bar chart ■ Pie chart ■ Donut chart ■ Bubble chart ■ Tree chart Default is **Bar chart**.
Task Parameter	The task data on which the task charting is based.
Group By Task Type	Whether the chart data is grouped by task type. The **Group By Task Type** option: ■ Is not available for Pie chart and Donut chart. ■ Is mandatory for Bubble chart and Tree Chart.

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.

Click...	To...
	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 73.
	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 87.
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.

Field	Description
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 79.

Operation	Perform these steps...
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 69.
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 Settings menu. You can configure to view the business data too.
Set a task list as the default landing page	Select **Set This As Landing Page** from Settings menu.
Accept tasks	Click **Accept** corresponding to the task in the task list.
Perform these actions on a task: ■ Resume ■ Suspend ■ Assign To ■ Accept For ■ Resubmit ■ Set Status ■ Delete ■ Delegate ■ Remove Delegation ■ Create Instant Task	See "Task Actions" on page 73.

8 Using Social Guidance for Task Execution

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 93.
- **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 92.

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 93.

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 25.

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 93.

- **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 25.

- **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 95.

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
`task.socialbpm.customendorse.enabled`	Specify `0` to disable endorsements through web services. Default value is `1` (enabled).
`task.socialbpm.enabled`	Specify `0` to disable all endorsement methods. That is, disable endorsement by other users, Task Engine, and web services. Default value is `1` (enabled).
`task.socialbpm.default.systemendorse.enabled`	Specify `0` to disable automatic endorsement by Task Engine. Default value is `1` (enabled).
`task.socialbpm.endorsement.rating`	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 91.

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 23.

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

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

Service	Description
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

Service	Description
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

Service	Description
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

Element	Description
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

keyword s	**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

rating	**Double** Numeric rating for endorsing the user for all the tags associated with the task.
taskID	**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
keywordID	**Integer** Unique keyword ID.
keywordName	**String** Keyword name.
keywordType	**String** Keyword type. Keyword type can be either `skill` or `tag`.

Guidance

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

Element	Description
displayName	**String** Expert user name.
rating	**Double** Expert user rating.
userId	**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
endorsedBy	**String** Who endorsed the user. Contains the user ID of the person who endorsed or 'SYSTEM' if endorsed by the system.
endorseCount	**Double** Rating provided to the user for the task tag.
keywordId	**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.

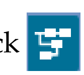
To...	Use this menu item...	Do...
Configure the Integration Server, Task Engine, and AgileApps to which Business Console must connect	**Administer Business Console**	See "Configuring Servers for Business Console" on page 22.
Configure a Twitter account for Business Console	**Administer Business Console**	See "Configuring Business Console with Twitter" on page 23.
Configure user endorsement	**Administer Business Console**	See "Configuring User Endorsement Rating" on page 25.
Configure to-do lists	**Administer Business Console**	See "Configuring To-Do List Setting" on page 25.
Configure task type display	**Administer Business Console**	See "Configuring Task Type Setting" on page 26.
Configure Work Stream	**Administer Business Console**	See "Configuring Work Stream" on page 27.
Configure AppSpace Settings	**Administer Business Console**	See "Configuring AppSpace Settings" on page 27
Configure the Analytical Engine for Business Console	**Administer Business Console**	See "Configuring the Analytical Engine for Business Console" on page 28
Configure Column Settings in Work Stream	**Administer Business Console**	See "Setting the Maximum Number of Columns in Work Stream" on page 28

To...	Use this menu item...	Do...
Manage task types using My webMethods	**Administer Tasks**	See "Managing Task Types Using My webMethods" on page 30.
Customize the user interface	**Customize Business Console**	See "Customizing Business Console" on page 30.
Program user endorsement		Use the web services available for business process guidance. See "Configuring User Endorsement Rating" on page 25 and "Using Services for Business Process Guidance" on page 95.

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 47.
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 58.
Search for cases in case list	**What's Happening Now > Work Stream**	1. Expand the case type bar. 2. Use the search field to search cases. See "Searching for Case Instances" on page 58.
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**	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**	1. Click on the process bar to view the keylinks 2. Click on the keylink pertaining to the status

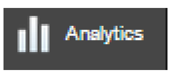
To...	Navigate to...	Do...
		of process instances you want to view.
Filter process instances	**What's Happening Now > Work Stream**	1. Click on the process bar to view the keylinks. 2. Click on the keylink pertaining to the status of process instances you want to view. 3. Search and view the process instances in the process list.
View process instance details	**What's Happening Now > Work Stream**	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 77.
Schedule task	**Instant Task** tab on the left margin or **What's Happening Now > Work Stream**	See "Scheduling Tasks" on page 75.
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 79.
Search for tasks in task list	**What's Happening Now > Work Stream**	1. Expand the task type bar. 2. Use the search field to search tasks. See "Searching for Task Instances" on page 79.
Create and use to-do lists	**What's Happening Now > Work Stream**	See "Using To-Do Lists" on page 81.
Configure task instances	**What's Happening Now > Work Stream > Task List**	Click **Settings.**
View mandatory child tasks	**What's Happening Now > Work Stream > Task List**	Use **Configure Columns** settings to display the **Is**

To...	Navigate to...	Do...
		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**	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**	1. Select the task instance in task list, and type your comment for the task. 2. Click **Add Attachments**. 3. Click **Attach**.
Reply to a comment, email the user who	**What's Happening Now > Activity Stream**	See "Collaborating Task Activities" on page 86.

To...	Navigate to...	Do...
commented for a task, or delete a comment		
Endorse users for a task	**What's Happening Now > Work Stream > Task List > Summary**	See "Configuring User Endorsement Rating" on page 25 and "Using Services for Business Process Guidance" on page 95.
Visualize task data and analyze task activity	**What's Happening Now > Task Activity**	See "Task Charting and Analyzing Task Activities" on page 85.
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 94.
Network with task experts	**What's Happening Now > Task Experts**	See "Networking with Task Experts" on page 93.
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 88.
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. 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 *Working with Business Process Dashboards*.
	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.
	■ View/hide task instances in case details and process details page. ■ Create instant task in Activity Stream.
	■ View/hide Activity Stream panel in case details and process details page. ■ View/hide Comments panel in task detail page.

Icon/Image	Click to...
	■ View/hide Attachments panel. ■ Add attachments.
	■ Configure setting or perform actions in: ■ 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	Task Type Permissions Required
■ Access Privileges > Monitoring > Business > Tasks > My Inbox	

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 > *Specific permissions*
Create to-do lists	**Functional Privilege** Business Console > Functional Privileges > To-Do Lists > Create To-Do List	Task Collaboration > *Specific permissions*
Reply to a comment or delete a task comment		Task Comments > *Specific permissions*
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 45.

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 46.

Additionally, you need the following access privilege:

- Business Console > Access Privileges > AppSpaces > AppSpace

Permissions For AgileApps Case Management

Cases types are defined in AgileApps. For more information about accessing cases in Business Console, see "Managing Cases" on page 52.

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*