Working with webMethods Mobile Business Console

Version 2.0

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WEBMETHODS

This document applies to webMethods Mobile Business Console Version 2.0 and to all subsequent releases.

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

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Table of Contents

About this Guide

This guide is for users of webMethods Mobile Business Console, a smartphone and tablet friendly administration and monitoring user interface for managing business processes. webMethods Mobile Business Console runs on Android and iOS platforms and provides you with a consolidated and detailed environment for viewing and modifying processes and tasks configured in My webMethods Server, and cases configured in AgileApps Cloud.

webMethods Mobile Business Console features are available to users based on the privileges of their role. The access and functional privileges assigned to you as a My webMethods Server user define the capabilities available to you in webMethods Mobile Business Console.

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

- AgileApps Cloud case management. For more information, see AgileApps Cloud documentation.
- Process model design and business process monitoring. For more information, see *Software AG Designer Online Help*, *webMethods Monitor User's Guide*, and *Working with webMethods Business Console*.
- Working with tasks in the My webMethods environment. For more 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 *Working with My webMethods*.

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 (+).
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.

Convention	Description
`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 (...).

Online Information

Software AG Documentation Website

You can find documentation on the Software AG Documentation website at http://documentation.softwareag.com. The site requires Empower credentials. If you do not have Empower credentials, you must use the TECHcommunity website.

Software AG Empower Product Support Website

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

To submit feature/enhancement requests, get information about product availability, and download products, go to Products.

To get information about fixes and to read early warnings, technical papers, and knowledge base articles, go to the Knowledge Center.

Software AG TECHcommunity

You can find documentation and other technical information on the Software AG TECHcommunity website at http://techcommunity.softwareag.com. You can:

- Access product documentation, if you have TECHcommunity credentials. If you do not, you will need to register and specify "Documentation" as an area of interest.
- Access articles, code samples, demos, and tutorials.

- Use the online discussion forums, moderated by Software AG professionals, to ask questions, discuss best practices, and learn how other customers are using Software AG technology.
- Link to external websites that discuss open standards and web technology.

1 Getting Started

webMethods Mobile Business Console runs on Android version 4 and above, and iOS version 7 and above. webMethods Mobile Business Console does not require any license and can be downloaded at no charge from Google Play Store (Android) or Apple App Store (iOS).

To use webMethods Mobile Business Console, you must have installed and configured the following Software AG products and fixes with a valid license.

- webMethods Business Console 10.0 and above and all products required for enabling the various capabilities of webMethods Business Console. For more information, see *Working with webMethods Business Console*.
- Portal and runtime fixes: Business Console 10.0 Portal Fix 3, and Business Console 10.0 Runtime Fix 3.

Before you can work with webMethods Mobile Business Console, you must create a user account in My webMethods Server and configure the permissions according to your needs. For more information, see *Working with webMethods Business Console*.

Note: webMethods Mobile Business Console Version 2.0 only works with webMethods Business Console 10.0 and above. If you work with webMethods Business Console 9.9 to 9.12, please install webMethods Mobile Business Console Version 1.1 and refer to version 1.1 of this guide for information.

Installing webMethods Mobile Business Console

webMethods Mobile Business Console Version 2.0 can be downloaded and installed on your smartphone or tablet from Google Play Store or Apple App Store.

To install webMethods Mobile Business Console Version 2.0 on your smartphone or tablet:

1. Open Google Play Store (for Android) or Apple App Store (for iOS) on your device.
2. Locate webMethods Mobile Business Console 2.
3. Click **Install**.

Logging in to webMethods Mobile Business Console

To log in to webMethods Mobile Business Console you need a configured My webMethods Server on which webMethods Business Console is running, and a My webMethods user account. For more information on configuring My webMethods Server for webMethods Business Console, see *Working with webMethods Business Console*.

To log in to webMethods Mobile Business Console:

1. Locate the webMethods Mobile Business Console launcher icon on your device.

2. In the Login panel, enter the name or IP address of the machine on which My webMethods Server is running in the **Host Name or IP** field.

   Note: You can use a secure connection (https) if a secure connection is explicitly configured in My webMethods Server.

3. Enter the port used by My webMethods Server in the **Port** field.
4. Enter your My webMethods user name in the **User Name** field.
5. Enter your My webMethods password in the **Password** field.
6. (Optional) Select **Remember Password**. When this option is enabled, the application saves the user credentials and tries to perform an automatic login once you restart the application. This property can be modified in **Settings**. For more information, see "Working with the Sidemenu" on page 21.
7. Click **Login**.

The Landing Summary panel opens on your device.

Logging out of webMethods Mobile Business Console

Use the following procedure to log out of webMethods Mobile Business Console.

To log out of webMethods Mobile Business Console:

1. In the Landing Summary or Work Stream panel, click in the upper left corner of the application, or swipe from left to right on any panel.
2. Select **Logout** from the sidemenu.

2 Operations Overview

webMethods Mobile Business Console has the following structure:

- Landing Summary (starting panel after login)
  - My Inbox
- Work Stream
  - Case List Manager
    - Case Details (tabs **Summary**, **Business Data**, **Activities**, **Workflows**, as well as the panels Comments, and Attachments)
  - Process List Manager
    - Process Details (including tabs **Summary**, **Diagram**, **Tasks**, as well as the panels Comments, and Attachments)
  - Task List Manager
    - Task Details (including tabs **Summary**, **Business Data**, **Instant Tasks**, as well as the panels Comments, Attachments, and Task Experts)

The table below lists the operations you can perform on selection of a panel in webMethods Mobile Business Console.

In this panel...	You can...
Landing Summary	■ Use the six keylinks **All Tasks**, **Critical Tasks**, **New Tasks This Week**, **Accepted Tasks**, **Tasks Expiring Today**, **My Offline Tasks** (only if offline mode is configured) to access your task inbox with the filter set on the selected keylink. ■ Click to refresh the data snapshot. ■ Click to navigate to the Notifications panel. **Note:** This icon is only displayed if notifications have been received. ■ Click **Go To Work Stream** to navigate to the Work Stream panel. ■ Click on the top left to open the sidemenu. ■ View the task activity chart (tablets only).
Sidemenu	■ Navigate to the **Landing Summary** panel.

In this panel...	You can...
	■ Navigate to the **Work Stream** panel (only in online mode). ■ Navigate to the **Work Offline** panel. ■ Open the **More AppSpaces** panel that lists all AppSpaces available in Mobile Business Console (only in online mode). **Note:** If an AppSpace was selected, the name of the AppSpace is also displayed in the sidemenu. ■ View and modify **Settings**. ■ View **Info and Help**. ■ **Logout**.
Work Stream	■ View all case types, process types, and task types for which you have permission to view. ■ Click to filter by **Case**, **Process**, **Task**, or **All**. ■ Click to perform a keyword search. ■ Click to enable the task activity chart (smartphones only). ■ Click on the top left to open the sidemenu. ■ Select a case type, a process type, or a task type to navigate to the Case List Manager, Process List Manager, or Task List Manager panel.
Work Stream > Case List Manager	■ View all case instances of the selected case type. ■ Click to load the keylink filter that was configured in webMethods Business Console. ■ Click to search for a case instance by its **Case ID**. ■ Click the arrow on the top left to navigate back to the Work Stream panel. ■ Select a case instance to navigate to the Case Details panel.
Work Stream > Case List Manager > Case Details	■ View and modify the case instance details on the **Summary** tab. ■ View case information on the **Business Data** tab.

In this panel...	You can...
	■ View a list of task instances associated with the case instance on the **Activities** tab. Select a task instance to open the **Activity Details** panel and view the details of the selected task instance. Select **Create new Activity** to open the **New Activity** panel and create a new activity. ■ View a list of process instances associated with the case instance on the **Workflows** tab. Select a process instance to open the **Process Image** panel and view an image of the process. ■ Click to open the Comments panel. View a maximum of 50 comments for this case instance, or add a new comment. ■ Click to open the Attachments panel. View all attachments for this case instance, download them (Android only), or click and attach a photograph. ■ Click to open the case menu (**Assign**, **Delete**, **Create new Activity**, and **Close**). ■ Click the arrow on the top left to navigate back to the Case List Manager panel.
Work Stream > Process List Manager	■ View all process instances of the selected process type. ■ Click to filter by process status **Running**, **Failed**, **Completed**, **Other**, or **All**, or use the buttons on top of the instance list. ■ Click to search for a process instance by its **Custom ID**. ■ Click the arrow on the top left to navigate back to the Work Stream panel. ■ Select a process instance to navigate to the Process Details panel.
Work Stream > Process List Manager > Process Details	■ View the process instance details on the **Summary** tab. ■ View the process diagram on the **Diagram** tab. ■ View the involved tasks on the **Task** tab. Select a task to navigate to the Task Details panel. ■ Click to open the Comments panel. View all comments for tasks associated with this process instance.

In this panel...	You can...
	■ Click to open the Attachments panel, view all attachments for the associated process tasks and download them (Android only). ■ Click the arrow on the top left to navigate back to the Process List Manager panel.
Work Stream > Task List Manager	■ View all task instances of the selected task type. ■ Click to filter by keylink **Cancelled**, **Errored**, **Expired**, **Suspended**, **Active**, **New**, **Completed**, **Scheduled**, or **All**. ■ Click to search for a task instance by its **Task ID**. ■ Click the arrow on the top left to navigate back to the Work Stream panel. ■ Select a task instance to navigate to the Task Details panel.
Work Stream > Task List Manager > Task Details	■ View and modify the task instance details on the **Summary** tab. Click to save your changes. ■ View task information on the **Business Data** tab. ■ View the instant tasks on the **Instant Tasks** tab. Select **Create Instant Task** to open the **New Instant Task** panel and create a new instant task. Select **Start To-Do List** to open the To-Do List panel and select a preconfigured to-do list. ■ Click to open the Comments panel. View all comments for this task instance, or add a new comment. ■ Click to open the Attachments panel. View all attachments for this task instance, download them (Android only), or click and attach a photograph. ■ Click to open the task menu (**Open Task Experts**, **Accept**, **Accept For**, **Assign**, **Delegate**, **Delete**, **Resubmit**, **Suspend**, **Start To-Do List**, **Create Instant Task**). ■ Click the arrow on the top left to navigate back to the Task List Manager panel.
My Inbox	■ View all task instances with the filter set on the keylink you selected in the Landing Summary panel.

In this panel...	You can...
	■ Click to filter by keylink **All Tasks**, **Critical Tasks**, **New Tasks This Week**, **Accepted Tasks**, **Tasks Expiring Today**, **My Offline Tasks** (only if offline mode is configured). ■ Click to search for a task instance by its **Task ID**. ■ Click the arrow on the top left to navigate back to the Landing Summary panel. ■ Select a task instance to navigate to the Task Details panel.

3 Working with the Landing Summary

The Landing Summary panel is the starting panel after login. It displays the date and time of the data snapshot, the task activity chart (tablets only), the connection mode (online/offline) as well as the following six keylinks and their number of tasks:

- All Tasks
- Critical Tasks
- New Tasks This Week
- Accepted Tasks
- Tasks Expiring Today
- My Offline Tasks (This item is only displayed if offline mode is configured. For more information, see. "Working Offline" on page 57).

Clicking a keylink leads you to your task inbox with the filter set on the selected keylink.

The following table displays additional operations you can perform in the Landing Summary:

To...	Do...
Refresh the data snapshot	Click on top of the panel.
Navigate to the Notifications panel	Click on top of the panel. **Note:** This icon is only displayed if notifications have been received.
Use the sidemenu	For more information, see "Working with the Sidemenu" on page 21.
Navigate to the Work Stream panel	Click **Go To Work Stream** on the panel bottom.

4 Working with the Sidemenu

The sidemenu can be either opened from the Landing Summary or Work Stream panels by clicking in the upper left corner, or by swiping from left to right on any panel.

The following table describes the items of the sidemenu:

Item	Description
Landing Summary	Selecting this menu item opens the Landing Summary panel. For more information, see "Working with the Landing Summary" on page 19.
Work Stream (only in online mode)	Selecting this menu item opens the Work Stream panel. For more information, see "Working with Work Stream" on page 23.
Work Offline	Selecting this menu item opens the Work Offline panel. For more information, see "Working Offline" on page 57.
More AppSpaces (only in online mode)	Selecting this menu item opens the More AppSpaces panel that lists all AppSpaces configured in webMethods Business Console for viewing type **Mobile**. For more information about AppSpaces and how to configure them for use on mobile devices, see *Working with webMethods Business Console*. **Note:** If an AppSpace was selected, the name of the AppSpace is also displayed in the sidemenu.
Settings	Selecting this menu item opens the Settings panel. It allows you to modify the password and notification settings.
Info and Help	Selecting this menu item opens the following submenu items: ■ **Issues? Send us Feedback** Selecting this submenu item opens a panel with a link to the Software AG Empower Product Support website where you can leave your feedback. ■ **About Business Console** Selecting this submenu item opens a panel with the webMethods Mobile Business

Item	Description
	Console version, the webMethods Business Console version, and the copyright declaration. ■ **Third Party Declaration** Selecting this submenu item opens a panel with the third party declaration. ■ **Data Protection** Selecting this submenu item opens a panel with Data Protection Act & Privacy. ■ **Legal Notices** Selecting this submenu item opens a panel with the legal notices.
Logout	Selecting this menu item logs you out of webMethods Mobile Business Console. For more information, see "Logging out of webMethods Mobile Business Console" on page 11.

5 Working with Work Stream

The Work Stream panel lists the case types configured in AgileApps Cloud, as well as the process types and task types configured in My webMethods Server for which you have permission to view.

Case types are marked by the icon . The case type list shows the case type names and descriptions.

Process types are marked by the icon . The process type list shows the process type names and descriptions.

Task types are marked by the icon . The taks type list shows the task type names, task application names (in brackets), and descriptions.

The following table displays the operations you can perform in Work Stream:

To...	Do...
Perform a keyword search	1. Click in the upper right corner. 2. Enter a keyword in the **Enter a Keyword** field. 3. Click in the upper right corner to delete the keyword, or click the search icon in the keypad to start searching.
Filter the list by case type, process type, or task type	1. Click in the upper right corner. 2. Select **Case**, **Process**, **Task**, or **All** from the drop-down menu.
Enable the task activity chart (smartphones only)	1. Click in the upper right corner. 2. Wait for the chart to load.
Use the sidemenu	For more information, see "Working with the Sidemenu" on page 21.
Navigate to the Case List Manager	Select a case type.
Navigate to the Process List Manager	Select a process type.

To...	Do...
Navigate to the Task List Manager	Select a task type.

6 Managing Case Instances

Case instances are grouped according to case types. In the Work Stream panel, you can view the list of case types configured in AgileApps Cloud for which you have permission to view. In the subordinate panels Case List Manager, and Case Details you can view real-time information about the case instances.

Working with the Case List Manager

The Case List Manager panel lists all case instances of the case type you selected in the Work Stream panel. The list states the case instance name, the case ID, and the case priority. The following priorities exist:

- P1 (critical)
- P2 (high)
- P3 (medium, default)
- P4 (low)
- P5 (none).

The case instances are marked by their status icon. If you click on a status icon, a list with all available statuses opens, and you can assign a new status. The following case instance statuses exist:

Case Status	Description
New	When a case is created, the status is set to **New**.
Open	When a case is assigned or claimed, the status is set to **Open**.
Pending	If more information is needed to work on a case, the status is set to **Pending** to remove the case from the current case list.
Resolved	When the case work is completed, the status is set to **Resolved**. The customer is asked for approval.
Waiting for customer input	When waiting for customer input, the status is set to **Waiting for customer input**.
Customer input received	When the customer has responded, the status is set to **Customer input received**.

Case Status	Description
Closed	When the customer approved, the status is set to **Closed**.
Reopen	When the customer rejected, the status is set to **Reopen**.
Merged	When two cases are merged, the status is set to **Merged**.
Unknown	The case status is unknown.

The following table displays the operations you can perform in the Case List Manager:

To...	Do...
Search for case ID	1. Click in the upper right corner. 2. Enter a case ID in the **Enter a Case ID** field. 3. Click in the upper right corner to delete the ID, or click the search icon in the keypad to start searching.
Filter the list by keylinks	■ Click to load the keylink filter that was configured in webMethods Business Console.
Navigate back to Work Stream	Click the arrow in the upper left corner.
Navigate to the Case Details panel	Select a case instance.

Viewing Case Details

The Case Details panel lists the details of the case instance you selected in the Case List Manager. The panel contains the four tabs **Summary**, **Business Data**, **Activities** and **Workflows**.

The **Summary** tab displays the following information:

Property	Description
Case number	Number of the case.

Property	Description
Description	Description provided for the case.
Priority	Priority defined for the case. For more information about case priorities, see "Working with the Case List Manager" on page 26.
Status	Status defined for the case. For more information about case statuses, see "Working with the Case List Manager" on page 26.
Subject	Subject defined for the case.
Duration	Length of time the case is active.

Some of the case properties can be modified. For more information, see "Modifying Case Properties" on page 29.

In the **Business Data** tab you can view the business data that is required by the case and passed from the process.

In the **Activities** tab you can view a list of task instances associated with the case instance and select a task instance to navigate to the Activities Details panel. For more information, see "Viewing Activity Details" on page 32. You can also create a new activity. For more information, see "Creating an Activity" on page 31.

In the **Workflows** tab you can view a list of process instances associated with the case instance. You can select a process instance to view a graphical depiction of the process in the Process Image panel.

The following table displays additional operations you can perform in the Case Details panel:

To...	Do...
Navigate back to the Case List Manager	Click the arrow in the upper left corner.
Navigate to the Comments panel	Click  in the upper right corner. For more information about managing comments, see "Managing Case Comments" on page 30.
Navigate to the Attachments panel	Click  in the upper right corner. For more information about managing attachments, see "Managing Case Attachments" on page 30.

To...	Do...
Use the case menu	Click ⋮ in the upper right corner and select one of the following items from the drop-down menu: ■ **Assign** For more information, see "Assigning Cases" on page 29. ■ **Delete** For more information, see "Deleting Cases" on page 30.

Modifying Case Properties

You can modify some of the case properties that are shown in the **Summary** tab of the Case Details panel.

To modify the properties of a case:

1. Navigate to the Case Details panel, and open the **Summary** tab.
2. Modify the property as required:

For this field ...	You can do this ...
Priority	Click the arrow in the **Priority** field, and select a priority from the drop-down list. For more information about case priorities, see "Working with the Case List Manager" on page 26.

Assigning Cases

With the case menu in the Case Details panel, you can assign the case the details of which you are viewing to one or more users, groups, roles, and case experts.

To assign a case:

1. Navigate to the Case Details panel.
2. Click ⋮ in the upper right corner, and select **Assign** from the drop-down menu.
3. In the Select Assignee panel, select one ore more users, groups, roles, case experts from the respective tabs.
4. Click **Assign To** in the upper right corner.

If the case was successfully assigned, a confirmation message is displayed; otherwise an error message is shown. The case will appear in the case inbox of the user(s), group(s), role(s), and case expert(s) to whom you assigned the case.

Deleting Cases

With the case menu in the Case Details panel, you can delete the case the details of which you are viewing.

To delete a case:

1. Navigate to the Case Details panel.
2. Click in the upper right corner, and select **Delete** from the drop-down menu.
3. In the confirmation dialog, click **Delete** to delete the case, or click **No** to abort the action.

If the case was successfully deleted, a confirmation message is displayed; otherwise an error message is shown. The case is deleted from the file system.

Managing Case Comments

In the Comments panel, you can view and post comments for the case the details of which you are viewing.

To manage case comments:

1. To open the Comments panel, click  in the upper right corner of the Case Details panel.
2. In the Comments panel, you can view a list with a maximum of 50 comments for the case. Each item in the list shows the name of the author, the message text and the posting date.
3. To post a new comment, click the plus icon in the upper right corner. Enter the text in the **Share a Message ...** field, and click **Post**.

Managing Case Attachments

In the Attachments panel, you can view and download the attachments of the case the details of which you are viewing.

The following filetypes exist:

Icon	Explanation
	Archive file
	Audio file
	Code file

Icon	Explanation
	Excel file
	PDF file
	PNG file
	Powerpoint file
	Text file
	Video file
	All other filetypes

To manage case attachments:

1. To open the Attachments panel, click in the upper right corner of the Case Details panel.
2. In the Attachments panel, select an attachment from the list to view it and to download it.

   Note: On Android, you can download all filetypes. On iOS, you can only download PNG files.

3. To attach a photograph, click in the upper right corner and take a photograph with your device. The photograph is then displayed in the attachments list.

Creating an Activity

In the Case Details panel, you can create a new activity.

To create an activity:

1. Navigate to the Case Details panel.
2. Click in the upper right corner, and select **Create new Activity** from the drop-down menu.
3. In the New Activity panel, modify the activity properties as required:

For this field ...	You can do this ...
Subject	Enter a subject name.

For this field ...	You can do this ...
Description	Enter a new description.
Priority	Specify a priority.
Due Date	Click and select a due date from the pop-up calendar.
Owner	Click **Browse**, and select a user from the owner list.

4. Click **Create Activity** in the upper right corner.

The activity is created and listed in the **Activities** tab of the Case Details panel.

Viewing Activity Details

The Activity Details panel lists the details of the task instance you selected in the **Activities** tab of the Case Details panel. The Activity Details panel contains the two tabs **Summary**, and **Business Data**.

The **Summary** tab displays the following information:

Property	Description
Case Number	Number specified for the case.
Subject	Subject specified for the activity.
Description	Description specified for the activity.
Custom ID	Custom ID specified for the activity.
Expiry Date	Expiration date of the activity.
Assigned To	Name of the user the activity is assigned to.
Created By	Name of the user who created the activity.
Priority	Priority specified for the activity.

In the **Business Data** tab you can view the business data that is required by the task and passed from the process.

7 Managing Process Instances

Process instances are grouped according to process types. In the Work Stream panel, you can view the list of process types configured in My webMethods Server for which you have permission to view. In the subordinate panels Process List Manager and Process Details you can view real-time information about the process instances.

Note: Only processes that have task steps can be monitored in webMethods Mobile Business Console.

Working with the Process List Manager

The Process List Manager panel lists all process instances of the process type you selected in the Work Stream panel. The list states the process instance name, ID, model type and model version. The instances are marked by their status icon. The following process instance statuses exist:

Process Status	Determines
Running	Process instance is started, running, or revised.
Failed	Process instance has failed.
Completed	Process instance has completed, or stopped.
Other	Process instance status is other than the ones mentioned above such as: ■ Failed (Escalated) ■ Resumed ■ Submitted ■ Suspended

The following table displays the operations you can perform in the Process List Manager:

To...	Do...
Search for custom ID	1. Click in the upper right corner. 2. Enter a custom ID in the **Enter a Custom ID** field. 3. Click in the upper right corner to delete the ID, or click the search icon in the keypad to start searching.

To...	Do...
Filter the list by process instance status	1. Click in the upper right corner. 2. Select **Running**, **Failed**, **Completed**, **Other**, or **All** from the drop-down menu. Or click the buttons on top of the process instance list: ■ (running). ■ (failed). ■ (other). ■ (completed). ■ (all). **Note:** A long click on these items opens a tooltip that displays the process status name and the number of processes matching this status.
Navigate back to Work Stream	Click the arrow in the upper left corner.
Navigate to the Process Details panel	Select a process instance.

Viewing Process Details

The Process Details panel lists the details of the process instance you selected in the Process List Manager. The panel contains the three tabs **Summary**, **Diagram**, and **Tasks**.

The **Summary** tab displays the following information:

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.
Duration	Length of time a process instance was active.

Field	Description
Model Version	Name of the model version used for the process instance.
Model Type	Name of the model type used for the process instance.
Created	Date and time the process instance was created.
Last Modified	Date and time the process instance was last modified.
Instance Iteration	Number of times the process instance has been submitted.

In the **Diagram** tab you can view an image of the process model as designed in Software AG Designer, if an image is available for the process model.

In the **Tasks** tab you can view the list of task instances belonging to the process instance. Select a task to navigate to the Task Details panel.

The following table displays additional operations you can perform in the Process Details panel:

To...	Do...
Navigate back to the Process List Manager	Click the arrow in the upper left corner.
Navigate to the Comments panel	Click to open the Comments panel. View all comments for tasks associated with this process instance. For more information about managing comments, see "Managing Process Comments" on page 36.
Navigate to the Attachments panel	Click in the upper right corner. For more information about managing attachments, see "Managing Process Attachments" on page 37.

Managing Process Comments

In the Comments panel, you can view the comments for tasks that are associated with the process the details of which you are viewing.

To manage process comments:

1. To open the Comments panel, click in the upper right corner of the Process Details panel.
2. In the Comments panel, you can view a summary of comments for tasks associated with the process. You cannot post a comment for a process.

Managing Process Attachments

In the Attachments panel, you can view and download the attachments of the tasks belonging to the process instance.

The following filetypes exist:

Icon	Explanation
	Archive file
	Audio file
	Code file
	Excel file
	PDF file
	PNG file
	Powerpoint file
	Text file
	Video file
	All other filetypes

To manage process attachments:

1. To open the Attachments panel, click in the upper right corner of the Process Details panel.
2. In the Attachments panel, select an attachment from the list to view it and to download it.

Note: On Android, you can download all filetypes. On iOS, you can only download PNG files.

8 Managing Task Instances

Task instances are grouped according to task types. In the Work Stream panel, you can view the list of task types configured in My webMethods Server for which you have permission to view. In the subordinate panels Task List Manager, and Task Details you can view real-time information about the task instances.

Working with the Task List Manager

The Task List Manager panel lists all task instances of the task type you selected in the Work Stream panel. The list states the task instance name, the task ID, and the task priority. The following priorities exist:

- None
- Low
- Medium
- High
- Critical

The task instances are marked by their status icon. The following task instance statuses exist:

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	The 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.
Errored	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.
Cancelled	The task is cancelled. No further work can be done on a task that is cancelled, 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.

The following table displays the operations you can perform in the Task List Manager:

To...	Do...
Search for task ID	1. Click in the upper right corner. 2. Enter a task ID in the **Enter a Task ID** field. 3. Click in the upper right corner to delete the ID, or click the search icon in the keypad to start searching.
Filter the list by task instance status	1. Click in the upper right corner. 2. Select **Cancelled**, **Errored**, **Expired**, **Suspended**, **Active**, **New**, **Completed**, **Scheduled**, or **All** from the drop-down menu.
Navigate back to Work Stream	Click the arrow in the upper left corner.
Navigate to the Task Details panel	Select a task instance.

Viewing Task Details

The Task Details panel lists the details of the task instance you selected in the Task List Manager. The panel contains the four tabs **Summary**, **Business Data**, **Instant Tasks** and **Task Experts**.

The **Summary** tab displays the following information:

Property	Description
Name	Name of the task.

Property	Description
Description	Description provided for the task or defined by the process.
Custom Task ID	Custom ID defined by the user for the task.
Expires On	Expiration date for the task.
Priority	Priority defined for the task. For more information about task priorities, see "Working with the Task List Manager" on page 40.
Duration	Length of time the task is active.
Task ID	The task identification number assigned to the task by webMethods Task Engine.
Parent Task ID	The task identification number assigned to the parent task.
Created By	Name of the user who created the task.
Created On	Date when the task was created.
Last Accepted By	Name of the user by whom the task was last accepted.
Last Accepted On	Date when the task was last accepted.
Last Modified By	Name of the user by whom the task was last modified.
Last Modified On	Date when the task was last modified.
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.
Tags	Tags specified for the task.

Property	Description
Mandatory	This option available for child tasks specifies if the task is a mandatory task. If a task is specified as mandatory, the parent task cannot be marked as completed unless the mandatory child task is **Completed**, **Errored**, **Cancelled**, or **Expired**.

Some of the task properties can be modified. For more information, see "Modifying Task Properties" on page 44.

In the **Business Data** tab you can view the business data that is required by the task and passed from the process.

In the **Instant Tasks** tab you can view the list of tasks that are attributed to the task instance, and select an instant task to navigate to its Task Details panel. If no instant tasks are specified, you can create a new instant task or start a to-do list. For more information, see "Creating an Instant Task" on page 45, and "Using To-Do Lists" on page 46.

In the **Task Experts** tab you can view the experts that are associated with the task the details of which you are viewing. For more information, see "Viewing Task Experts" on page 46.

The following table displays additional operations you can perform in the Task Details panel:

To...	Do...
Navigate back to the Task List Manager	Click the arrow in the upper left corner.
Navigate to the Comments panel	Click in the upper right corner. For more information about managing comments, see "Managing Task Comments" on page 49.
Navigate to the Attachments panel	Click in the upper right corner. For more information about managing attachments, see "Managing Task Attachments" on page 49.
Use the task menu	Click in the upper right corner and select one of the following items from the drop-down menu: ■ **Accept** For more information, see "Accepting Tasks" on page 47. ■ **Accept For** For more information, see "Accepting Tasks on Behalf of Another User" on page 47.

To...	Do...
	■ **Assign** For more information, see "Assigning Tasks" on page 47. ■ **Delegate** For more information, see "Delegating Tasks" on page 48. ■ **Delete** For more information, see "Deleting Tasks" on page 48. ■ **Resubmit** For more information, see "Resubmitting Tasks" on page 48. ■ **Suspend** For more information, see "Suspending Tasks" on page 49. ■ **Start To-Do List** For more information, see "Using To-Do Lists" on page 46. ■ **Create Instant Task** For more information, see "Creating an Instant Task" on page 45.

Modifying Task Properties

You can modify some of the task properties that are shown in the **Summary** tab of the Task Details panel.

To modify the properties of a task:

1. Navigate to the Task Details panel, and open the **Summary** tab.
2. Modify the property as required:

For this field ...	You can do this ...
Name	Enter a new name in the **Name** field.
Description	Enter a new description in the **Description** field.
Custom Task ID	Enter a new custom task ID in the **Custom Task ID** field.
Expires On	Click in the **Expires On** field, and select a date from the pop-up calendar.
Priority	Click the arrow in the **Priority** field, and select a priority from the drop-down list. For more

For this field ...	You can do this ...
	information about task priorities, see "Working with the Task List Manager" on page 40.

3. Click in the upper right corner.

Note: A maximum of three icons is displayed in the upper right corner. If the save icon is not visible, click and select **Save** from the drop-down menu.

Creating an Instant Task

In the Task Details panel, you can create an instant task for a parent task.

To create an instant task:

1. Navigate to the Task Details panel.
2. Click in the upper right corner, and select **Create Instant Task** from the drop-down menu.
3. In the New Instant Task panel, modify the task properties as required:

For this field ...	You can do this ...
Collaboration Task Type	This field displays the task type of the parent task. It cannot be modified.
Name	Enter a new name in the **Name** field.
Description	Enter a new description in the **Description** field.
Priority	Click the arrow in the **Priority** field, and select a priority from the drop-down list. For more information about task priorities, see "Working with the Task List Manager" on page 40.
Expires On	Click in the **Expires On** field, and select a date from the pop-up calendar.
Assign To	Click **Browse**, and select a user from the list in the Select Assignee panel.
Mandatory	Select this option to specify the task as mandatory. If a task is specified as mandatory, the parent task cannot be marked as completed unless

For this field ...	You can do this ...
	the mandatory child task is **Completed**, **Errored**, **Cancelled**, or **Expired**.
Queue Task Immediately	Select this option to queue the task immediately. If you select this option, the task status is set to **Active**; otherwise it is set to **New**.

4. Click **Create Task** in the upper right corner.

The instant task is created and listed in the **Instant Tasks** tab of the Task Details panel.

Using To-Do Lists

A to-do list is a defined set of tasks. You cannot create to-do lists in webMethods Mobile Business Console, but only use to-do lists that were created in webMethods Business Console. For more information about creating to-do lists, see *Working with webMethods Business Console*.

To use a to-do list:

1. Navigate to the Task Details panel.
2. Click in the upper right corner, and select **Start To-Do List** from the drop-down menu.
3. In the To-Do List panel, select a to-do list from the list of **Private Templates** or **Public Templates**.
4. In the Configure Tasks panel, click **Start**.

The template creates a set of tasks with default properties. The created tasks are listed in the **Instant Tasks** tab of the Task Details panel.

Viewing Task Experts

With the **Task Experts** tab in the Task Details panel, you can view the experts that are associated with the task the details of which you are viewing.

To view the task experts:

1. Navigate to the Task Details panel.
2. Click the **Task Experts** tab.

The Task Experts panel opens and displays a list of experts who are associated with the task. If you select a task expert, a pop-up menu opens that allows you to assign or delegate a task to this task expert. For more information about assigning or delegating tasks, see "Assigning Tasks" on page 47 and "Delegating Tasks" on page 48.

Accepting Tasks

With the task menu in the Task Details panel, you can accept the task the details of which you are viewing.

To accept a task:

1. Navigate to the Task Details panel.
2. Click ⋮ in the upper right corner, and select **Accept** from the drop-down menu.

If the task was successfully accepted to you, a confirmation message is displayed; otherwise an error message is shown. The task will appear in your task inbox.

Accepting Tasks on Behalf of Another User

With the task menu in the Task Details panel, you can accept the task the details of which you are viewing on behalf of another user.

To accept a task on behalf of another user:

1. Navigate to the Task Details panel.
2. Click ⋮ in the upper right corner, and select **Accept For** from the drop-down menu.
3. In the Select Assignee panel, select one ore more users for whom you want to accept the task.
4. Click **Accept For** in the upper right corner.

If the task was successfully accepted, a confirmation message is displayed; otherwise an error message is shown. The task will appear in the task inbox of the user(s) for whom you accepted the task.

Assigning Tasks

With the task menu in the Task Details panel, you can assign the task the details of which you are viewing to one or more users, groups, roles, and task experts.

To assign a task:

1. Navigate to the Task Details panel.
2. Click ⋮ in the upper right corner, and select **Assign** from the drop-down menu.
3. In the Select Assignee panel, select one ore more users, groups, roles, task experts from the respective tabs.
4. Click **Assign To** in the upper right corner.

If the task was successfully assigned, a confirmation message is displayed; otherwise an error message is shown. The task will appear in the task inbox of the user(s), group(s), role(s), and task expert(s) to whom you assigned the task.

Delegating Tasks

With the task menu in the Task Details panel, you can delegate the task the details of which you are viewing to one or more users, and task experts.

To delegate a task:

1. Navigate to the Task Details panel.
2. Click ⋮ in the upper right corner, and select **Delegate** from the drop-down menu.
3. In the Select Assignee panel, select one ore more users, or task experts from the respective tabs.
4. Click **Delegate** in the upper right corner.

If the task was successfully delegated, a confirmation message is displayed; otherwise an error message is shown. The task will appear in the task inbox of the user(s), and task expert(s) to whom you delegated the task.

Deleting Tasks

With the task menu in the Task Details panel, you can delete the task the details of which you are viewing.

To delete a task:

1. Navigate to the Task Details panel.
2. Click ⋮ in the upper right corner, and select **Delete** from the drop-down menu.
3. In the confirmation dialog, click **Delete** to delete the task, or click **No** to abort the action.

If the task was successfully deleted, a confirmation message is displayed; otherwise an error message is shown. The task is deleted from the file system.

Resubmitting Tasks

With the task menu in the Task Details panel, you can resubmit an active task the details of which you are viewing. This forces the task data to be reevaluated regardless of whether or not any of the data has been modified.

Note: Resubmitting a task can have an effect on task assignments.

To resubmit a task:

1. Navigate to the Task Details panel.
2. Click in the upper right corner, and select **Resubmit** from the drop-down menu.

If the task was successfully resubmitted, a confirmation message is displayed; otherwise an error message is shown.

Suspending Tasks

With the task menu in the Task Details panel, you can suspend an active task the details of which you are viewing.

To suspend a task:

1. Navigate to the Task Details panel.
2. Click in the upper right corner, and select **Suspend** from the drop-down menu.

If the task was successfully suspended, a confirmation message is displayed; otherwise an error message is shown.

Managing Task Comments

In the Comments panel, you can view and post comments for the task the details of which you are viewing.

To manage task comments:

1. To open the Comments panel, click  in the upper right corner of the Task Details panel.
2. In the Comments panel, you can view the list of comments for the task. Each item in the list shows the name of the author, the message text and the posting date.
3. To post a new comment, click the plus icon in the upper right corner. Enter the text in the **Share a Message ...** field, and click **Post**.

Managing Task Attachments

In the Attachments panel, you can view and download the attachments of the tasks the details of which you are viewing.

The following filetypes exist:

Icon	Explanation
	Archive file

Icon	Explanation
	Audio file
	Code file
	Excel file
	PDF file
	PNG file
	Powerpoint file
	Text file
	Video file
	All other filetypes

To manage task attachments:

1. To open the Attachments panel, click in the upper right corner of the Task Details panel.
2. In the Attachments panel, select an attachment from the list to view it and to download it.

   Note: On Android, you can download all filetypes. On iOS, you can only download PNG files.

3. To attach a photograph, click in the upper right corner and take a photograph with your device. The photograph is then displayed in the attachments list.

9 Managing Your Task Inbox

The My Inbox panel is accessible through the keylinks in the Landing Summary panel. It displays a list of your tasks filtered by the selected keylink. The following keylinks are availabe:

- All Tasks
- Critical Tasks
- New Tasks This Week
- Accepted Tasks
- Tasks Expiring Today
- My Offline Tasks (only if offline mode is configured).

The task list states the task instance name, the number of associated instant tasks, the task ID, and the task priority. The tasks are marked by their status icon. For details about existing task priorities and task statuses, see "Working with the Task List Manager" on page 40.

The following table displays the operations you can perform in My Inbox:

To...	Do...
Search for task ID	1. Click in the upper right corner. 2. Enter a task ID in the **Enter a Task ID** field. 3. Click in the upper right corner to delete the ID, or click the search icon in the keypad to start searching.
Filter the list by keylink	1. Click in the upper right corner. 2. Select **All Tasks**, **Critical Tasks**, **New Tasks This Week**, **Accepted Tasks**, **Tasks Expiring Today**, or **My Offline Tasks** from the drop-down menu.
Navigate back to Landing Summary	Click the arrow in the upper left corner.
Navigate to the Task Details panel	Select a task instance. For more information about task actions you can perform in the Task Details panel, see "Viewing Task Details" on page 41.

10 General Features

webMethods Mobile Business Console provides the following general features:

- URL schemata, either to start webMethods Mobile Business Console on your device with prefilled login information, or to open a specific task, or to open a specific process. For more information, see "Working with URL Schemata" on page 54.
- Notifications that are received if a task has been assigned or delegated to you. For more information, see "Working with Notifications" on page 54.

Working with URL Schemata

You can use URL schemata to start webMethods Mobile Business Console on your device with prefilled login data, to open a specific task, or to open a specific process. You can do this either by clicking a HTML link based on the URL schema that was sent to you by email or by text message, or by entering the URL schema in your browser (Android only).

To start the application with prefilled login data, use the following URL schema:

```
mbc://hostname={hostname}&port={port}&username={username}
```

After clicking the HTML link or entering the URL schema in your browser, you will be asked to accept the prefilled data. If you accept, the current user will be logged out of the application, and the login data transmitted in the URL schema will be entered as login credentials.

To open a specific task, use the following URL schema:

```
mbc://taskId={taskId}
```

After clicking the HTML link or entering the URL schema in your browser, the Task Details panel will be opened.

To open a specific process, use the following URL schema:

```
mbc://process={process}
```

After clicking the HTML link or entering the URL schema in your browser, the Process Details panel will be opened.

Working with Notifications

To work with notifications, you must download an oAuth key (for Android) and a certificate (for iOS) from the Software Download Center on Empower and install the files on My webMethods Server. For more information about how to download and install these files, see "Installing the Key and Certificate" on page 55. After installation, you are notified when a task has been assigned or delegated to your user ID whenever you are logged in to webMethods Mobile Business Console. If you do not want to receive these notifications, you must deactivate notifications in the Settings panel.

The notification has the following text:

```
User task [ID]: has been Assigned/Delegated to you.
```

If webMethods Mobile Business Console is in focus, you will receive a pop-up notification when a task has been assigned or delegated to you. The notification is also displayed in the notification center of your device.

In case of notifications, the icon is displayed in the Landing Summary panel. If you click the icon, the Notifications panel opens. It shows a list of task IDs and their respective message.

The following table displays the operations you can perform in the Notifications panel:

To...	Do...
Clear the notifications list	Click in the upper right corner.
Navigate to the associated task	Click an entry in the list. The task is then marked as read and deleted from the list, and the Task Details panel opens.
Navigate back to the Landing Summary panel	Click the arrow in the upper left corner.

Installing the Key and Certificate

Before you can work with notifications, you must download an oAuth key (for Android) and a certificate (for iOS) and install them on My webMethods Server.

To download and install the key and certificate:

1. Login to https://empower.softwareag.com and navigate to **Product & Documentation > Download Products > Software Download Center**.
2. Select **PushNotificationFiles.zip** from **Download Release: Software AG Product Suite 10.0 > Products: My webMethods Server > Product Items**, store it on your computer and unzip it. It contains the file oAuth-Key.txt with the oAuth key for Android, and the MBC2-PushProd.p12 certificate file for iOS.
3. Login as system administrator to My webMethods Server and navigate to **Folders > Administrative Folders > Administration Dashboard > Configuration > Mobile Push Notification Administration**.
4. In the table, click **Edit** in the **MBC** row.

   Note: If you are working with webMethods Business Console 10.1 or above, you must first create an entry for Mobile Business Console as described in *Administering My webMethods Server*.

5. On the Mobile App Config page, do one of the following:
   a. For Android:

Field	Description
End Point URL	Enter `http://gcm-http.googleapis.com/gcm/send`.
OAuth	Enter the value provided in the oAuth-Key.txt file.

b. For iOS:

Field	Description
Host Name	Enter `gateway.push.apple.com`.
Port Number	Enter `2195`.
Certificate Path	Enter the path where you stored the certificate file.
Password	Enter `manage123`.

6. Click **Submit**.

11 Working Offline

You can use webMethods Mobile Business Console in offline mode and modify up to 50 tasks. webMethods Mobile Business Console is offline if the connection to webMethods Business Console or to the internet is lost. You can also work in forced offline mode. Before you can work offline, you must configure the offline settings. To open the offline settings panel, click **Work Offline** in the sidemenu.

The following table displays the operations you can perform in the Work Offline settings panel:

To...	Do...
Check if your device is online or offline	Check the information below **Connection Status**.
Work in forced offline mode	Pull the **Work Offline** slider to the right. To return to online mode, pull to the left.
Ping webMethods Business Console	Click the arrow under **Ping Business Console**.
Select the tasks you want to modify	**Select a Saved Search** from the drop-down menu. For more information about saved searches, see *Working with webMethods Business Console*.
Navigate to the Modified Tasks panel to review the modifications made while working offline	Click **Review and synchronize any pending changes ...** and proceed as described in "Reviewing and Synchronizing Changes" on page 59.

As soon as you have configured the offline settings, the additional keylink **My Offline Tasks** is shown in the Landing Summary panel and leads you to your task inbox with the filter set on your offline tasks.

Selecting an offline task opens the Task Details panel. The tasks can be modified as described in "Viewing Task Details" on page 41 with the following restrictions:

Tab/Panel	Restriction
Summary	None.
Business Data	Only displayed if the business data has been displayed before in online mode and can be loaded from cache.
Instant Tasks	None.

Tab/Panel	Restriction
Task Experts	None.
Comments	Existing comments are not displayed, but you can enter a new comment.
Attachments	Existing attachments are not displayed, but you can attach a new file.

Reviewing and Synchronizing Changes

When you returned to online mode, you are prompted to synchronize or dismiss the modifications you made while working offline.

To review and synchronize any pending changes:

1. In the Back Online! pop-up window, select **Synchronize** to open the Modified Tasks panel, or select **Dismiss All** to dismiss the modifications you made.
2. In the Modified Tasks panel, all modified tasks are listed. Each list item states the task name, task ID and number of changes made. If you click a number, the View Changes panel opens and lists all changes made to this task. You can undo any change by clicking .
3. After you reviewed the modifications, click the arrow in the upper left corner of the View Changes panel to navigate back to the Modified Tasks panel.
4. In the Modified Tasks panel, click in the upper right corner to synchronize the tasks.

If the tasks were successfully synchronized, a confirmation message is displayed; otherwise an error message is shown.