

Working with webMethods Business Console

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This document applies to Business Console Version 9.10 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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About this Guide

This guide is for users of webMethods Business Console, a web and tablet friendly user interface for administration, management, and monitoring of business processes. Business Console provides you consolidated and detailed views, dashboards, analytics, charting, collaboration environment, and social guidance for executing the business processes and tasks configured in My webMethods Server.

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*.
- 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 *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 <i>folder.subfolder:service</i> .
UPPERCASE	Identifies keyboard keys. Keys you must press simultaneously are joined with a plus sign (+).

Convention	Description
<i>Italic</i>	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 (...).

Online Information

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-
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 - 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 Overview

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

Business managers can:

- Monitor and analyze business processes and tasks using dashboards, 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.

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. For information about permission setting, see "[Permission Reference](#)" on page 89.

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	<ul style="list-style-type: none"> ■ Monitor process instances and task 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,

In Business Console...	You can...
	<p>and configuring task actions in the Activity Stream panel.</p> <ul style="list-style-type: none"> ■ Search social networking site for posts related to your tasks and view trending information in the Twitter Stream panel. ■ Use social guidance to identify user expertise, endorse users, and improve business processes in the Task Experts panel.
Home > Task Inbox	<ul style="list-style-type: none"> ■ Search, view, and execute tasks assigned to you either directly to your user account, or indirectly, through a role or group that you are a member of.
Dashboards	<ul style="list-style-type: none"> ■ Create new dashboards using gadgets. ■ Edit dashboards and configure the gadgets used in the dashboard. ■ Use a customized dashboard instead of the default What's Happening Now page.
Processes	<ul style="list-style-type: none"> ■ View process diagram with interactive step metrics. ■ View process instance details, step details, and rule violations. ■ View data comparison metrics. <p>For more information, see <i>webMethods Optimize User's Guide</i>.</p>
Analytics	<ul style="list-style-type: none"> ■ 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. <p>For more information, see <i>Working with Business Process Dashboards</i>.</p>

2 Getting Started

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Pre-Requisites

Before you begin, configure the following:

- For managing only the tasks, install and configure the following products:
 - webMethods Task Engine
 - My webMethods Server
 - webMethods Database Component Configurator
- For managing processes with task steps, install and configure the following products:
 - webMethods Integration Server
 - webMethods Task Engine
 - webMethods Process Engine
 - My webMethods Server
 - webMethods Monitor
 - webMethods Database Component Configurator
- Create user account in My webMethods Server and configure the permissions to work with process instances and task instances. See ["Users, Roles, and Groups" on page 16](#).
- For enabling capabilities in the **Processes** tab, install and configure this product in addition to the products configured for process management:
 - Optimize

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

- For enabling capabilities in the **Analytics** tab, install and configure these products in addition to the products configured for process management:
 - Optimize
 - Rules Engine
 - Presto

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. For more information, see "[Permission Reference](#)" on page 89.

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

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Configuring Integration Server and My webMethods Server for Business Console

Only users with administrator privileges can specify the Integration Server and Task Engine for Business Console.

Specify the values for the following fields in the **Administer Business Console** menu option in the administration menu:

Field	Specify...
Integration Server URL	<p>URL of the Integration Server that Business Console must connect to. For example, <code>http://localhost:5555</code>.</p> <p>Make sure that Process Engine is configured in the Integration Server.</p> <p>Note: In the URL, if you specify a machine name or IP address, make sure you configure the remote My webMethods Server to allow access to Business Console. See the instructions in "Configure a Remote My webMethods Server to Allow Access to Business Console" on page 21.</p>
Task Engine URL	<p>URL of the Task Engine that Business Console must connect to. For example, <code>http://localhost:8585</code>.</p> <p>Make sure you have configured the following with Task Engine:</p> <ul style="list-style-type: none"> ■ My webMethods Server ■ My webMethods ■ Monitor <p>Note: In the URL, if you specify the machine name or IP address, make sure you configure the remote My webMethods Server to allow access to Business Console. See the instructions in "Configure a Remote My webMethods Server to Allow Access to Business Console" on page 21.</p>

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

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

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

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

2. Change the Cross-origin filter to:

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

Configuring Business Console with Twitter

Before you configure and enable the Twitter settings, make sure you have created an account in Twitter. See ["Creating Twitter Account for Business Console" on page 22](#).

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 22.
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 21.](#)

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 54](#).

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	<p>Whether or not to poll Task Engine for the status of to-do lists.</p> <p>If you have enabled to-do list polling, when you start a to-do list, Business Console polls the Task Engine in regular intervals and displays the updated status of the start operation in the To-Do List dialog. If you want to stop polling that has been going on for a long time, click  at the end of the polling progress bar.</p> <p>You can disable to-do list polling to avoid frequent polling of Task Engine. If you have disabled to-do list polling,  Refresh polling icon is available on the To-Do List dialog for starting manual polling.</p>

Configuring Task Type Setting

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

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

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

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 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.

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	<ol style="list-style-type: none"> 1. Select the Customize Business Console menu option from the administration menu. 2. Select Logo from the menu options on the Customize Business Console page. 3. Click Select Logo to upload the logo. <p>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.</p>

To customize...	Perform these steps...
Masthead Color	<p data-bbox="524 327 1325 357">4. Click Reset to Default, if you want to retain the default logo.</p> <ol style="list-style-type: none"> <li data-bbox="524 405 1330 464">1. Select the Customize Business Console menu option from the administration menu. <li data-bbox="524 491 1227 550">2. Select Masthead Color from the menu options on the Customize Business Console page. <li data-bbox="524 577 1260 636">3. Use the color pickers to select the colors for masthead elements. <li data-bbox="524 663 1008 693">4. Click Preview to view the changes. <li data-bbox="524 720 1360 749">5. Click Reset to Defaults, if you want to retain the default colors. <li data-bbox="524 777 1243 806">6. Click Apply to apply the new colors to the masthead.
Title and Labels	<ol style="list-style-type: none"> <li data-bbox="524 852 1333 911">1. Select the Customize Business Console menu option from the administration menu. <li data-bbox="524 938 1227 997">2. Select Title and Labels from the menu options on the Customize Business Console page. <li data-bbox="524 1024 1333 1138">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. <li data-bbox="524 1165 1333 1194">4. Click Reset to Defaults, if you want to retain the default title. <li data-bbox="524 1222 972 1251">5. Click Apply to use the new title.
Color Theme	<ol style="list-style-type: none"> <li data-bbox="524 1299 1333 1358">1. Select the Customize Business Console menu option from the administration menu. <li data-bbox="524 1386 1341 1444">2. Select Color Theme from the menu options on the Customize Business Console page. <li data-bbox="524 1472 1349 1535">3. Select a theme and click Apply to apply the new theme to the masthead.
Gadgets	<ol style="list-style-type: none"> <li data-bbox="524 1587 1333 1646">1. Select the Customize Business Console menu option from the administration menu. <li data-bbox="524 1673 1292 1732">2. Select Gadgets from the menu options on the Customize Business Console page. <li data-bbox="524 1759 1036 1789">3. Select the color for gadget elements. <li data-bbox="524 1816 1357 1869">4. Click Apply to apply the new colors to all the gadgets used in Business Console.

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

Customizing Business Console Using Gadgets

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

- Built-in gadgets
- Customized gadgets that are 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 dashboard.

For...	See...
Creating new dashboards using gadgets	"Creating Business Console Dashboards Using Gadgets" on page 28
Editing dashboards	"Editing Dashboard Using Gadgets" on page 29
Customizing gadgets	"Customizing Business Console" on page 25
Customizing process details page using gadgets	"Customizing Process Details Using Gadgets" on page 33
Customizing task details page using gadgets	"Customizing Task Details Using Gadgets" on page 34
Creating gadgets using Software AG Designer	<i>webMethods CAF Development Help</i>
Assigning gadget permissions to users	"Assigning Access Permissions For Gadgets" on page 34

Creating Business Console Dashboards Using Gadgets

In the **Dashboards** tab, use the procedure below to create customized dashboards by using built-in gadgets or the gadgets created in Designer.

To create a new customized dashboard

1. In the **Dashboards** tab, click .
2. Specify the title and the layout for the dashboard and click **Save**.
3. Click **Add Gadget** 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 30](#).
4. Configure each gadget and arrange the gadgets in the dashboard, see ["Editing Dashboard Using Gadgets" on page 29](#).

5. To change layout and title of the dashboard, click **Change Layout/Title** and specify the new layout.
6. Click **Save** to save the new dashboard for future use.
7. Click **Cancel** to discard the changes made to the dashboard.

Editing Dashboard Using Gadgets

Use the procedure below to edit an existing dashboard.

To edit a dashboard

1. In the **Dashboards** tab, select the dashboard you want to edit.
2. Click **Edit Dashboard**.
3. Edit the dashboard and configure the gadgets.
 - To add gadgets to the dashboard, click **Add Gadget**.

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 30.
 - To change the layout and title of the dashboard, click **Change Layout/Title**.
 - To configure each gadget and arrange the gadgets in the dashboard, click  corresponding to the gadget.
 - Select **Gadget Configuration** to specify the gadget setting.

For configuring a built-in gadget, see "[Understanding Built-in Gadgets](#)" on page 30. 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 **Set as Landing Page**, if you want to set the dashboard as the landing page for Business Console.

- Click **Delete Dashboard**, if you want to remove the customized dashboard.

Understanding Built-in Gadgets

This section describes the built-in gadgets available for customizing Business Console dashboards. 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 30.
- Business Console - Tasks. For a description of the task related built-in gadgets, see "[Task Related Gadgets](#)" on page 31.
- Business Console - Common. For a description of the common built-in gadgets, see "[Common Gadgets](#)" on page 32.
- 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 34.

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.
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.

Built-in Gadget	Description	Gadget Setting
Process Summary	Displays the summary details of the specified process.	Instance ID of the process for which the process details must be retrieved.
Process Tasks	Displays the task instances of the specified process.	Instance ID of the process for which the task instances must be retrieved.
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.	See "Editing Chart Settings" on page 58.
Task Inbox	Displays the specified task inbox.	Inbox to view. Specify My Inbox to view the tasks assigned to you, or select one of the saved searches to view the tasks.
Task Audit	Displays the audit information of the specified task.	Task ID of the task to be audited.
Task Business Data	Displays business data of the specified task.	<ul style="list-style-type: none"> ■ Task ID to specify the task for which the business data must be retrieved. ■ TaskType Name of the task. ■ TaskApp 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.

Built-in Gadget	Description	Gadget Setting
Task Comments	Displays the comments provided to the specified task.	Task 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.	<ul style="list-style-type: none"> ■ Tags specifies the task tags for retrieving a list of recommended task experts. ■ Collapsible specifies whether or not the list of task experts must be collapsible.
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.	Task 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.	Task ID of the task for which the task summary fields must be retrieved.
Task Schedule Calendar	Displays a calendar marked to quickly identify the days when you have tasks assigned to you. You can view details of the tasks scheduled on a particular date. See "My Calendar" on page 49 .	None.

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.

Built-in Gadget	Description	Gadget Setting
Attachments	Displays the attachments of the specified process type or task type.	<ul style="list-style-type: none"> ■ Attachment Type to view <ul style="list-style-type: none"> ■ Process ■ Task ■ Instance ID of the process type or task type based on the value of Attachment Type.
Instance List Management	Displays the process list or task list based on the gadget setting.	<ul style="list-style-type: none"> ■ List Management Type to list <ul style="list-style-type: none"> ■ Process ■ Task ■ Process / Task ID of the process type or task type based on the type specified in List Management Type. ■ Show Details Modal to make the process instances or task instances drill-able.
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.

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 **Dashboards** tab, select the customized work stream dashboard.
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 Dashboard Using Gadgets](#)" on page 29.
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 **Dashboards** tab, select the customized work stream dashboard.
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 Dashboard Using Gadgets](#)" on page 29.
5. Click **Save** to save the changes to the customized task details page.

Assigning Access Permissions For Gadgets

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

Assigning access permissions for gadgets

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** and click **Ok**.

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 Managing Process Instances and Task Instances

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About Work Stream

The process types and task types that were created in Software AG Designer and for which you have permission to view are listed in **Work Stream**.

Process instances and task instances are grouped according to process types and task types respectively. In **Work Stream**, you can view real-time information about the processes and tasks in process lists, task lists, process instances, and task instances. For more information, see "[Operations You Can Perform in Work Stream](#)" on page 38.

Important: Only the processes that have task steps can be monitored in Business Console.

Operations You Can Perform in Work Stream

- View the process types and task types for which you have permission to view.
- Search for process types that have task steps, task types, process instances, and task instances by using search filters in **Work Stream**, process list, and task list.
- View process instances grouped by process status (badges) in a process list.
- View callable processes in process lists.
- Configure columns of process lists and tasks lists.
- View details and process diagram of a process instance.
- View task instances using customized keylinks (saved searches) in a task list.
- View details and business data of a task instance.
- Perform actions on tasks.
- Create and re-use saved searches for task instances.
- Create instant task.
- Start a task.
- Create a to-do list.
- Customize keylinks for task types.

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 40.
- Process diagram in the **Diagram** tab.
- Process activities (consolidated list of activities related to all the tasks belonging to the process instance) in the **Activities Stream** panel.
- Process attachments (all the attachments of the tasks belonging to the process instance) in the **Attachments** panel.

Field	Description
<i>Process type name</i>	Name of the process type or process model of the process instance.
<i>Process instance ID</i>	ID of the process instance.
Status	Status of the process instance. For more information, see " Process Instance Statuses " on page 41.
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.

Field	Description
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.

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	<p>Process instance status is other than the ones mentioned above such as:</p> <ul style="list-style-type: none"> ■ Failed (Escalated) ■ Suspended ■ Resumed ■ Submitted

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 51.

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 52.

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 59 and "[Using To-Do Lists](#)" on page 54.

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 46.

Manage tasks using:

- Task lists. See ["Task List Operations"](#) on page 42.
- Task detail page. See ["Task Instance Operations"](#) on page 42.

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 47 and "Task Priority" on page 46.
Schedule a task	See "Scheduling Tasks" on page 48.
Start a task	See "Starting Tasks" on page 50.
Search for task instances	See "Searching for Task Instances" on page 52.
Perform task actions such as Resume, Suspend, Assign To, Accept For, and Resubmit.	See "Task Actions" on page 46.
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 59.
Use to-do lists	See "Using To-Do Lists" on page 54.
View task instance details	Click the task ID corresponding to the task instance in the task list. See "Task Instance Operations" on page 42.

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 44.
View to-do tasks, attachments, comments, experts, and audit information of the task	Use the toggle switches on the left side vertical bar of the process instance page to show/hide Comments, Task Experts, Attachments, and Audit panels of the task instance.
Perform task actions such as Resume, Suspend, Assign To, Accept For, and Resubmit.	See "Task Actions" on page 46.
Change the schedule of a task	See "Rescheduling Tasks" on page 49.
Create or view child tasks	See "Creating an Instant Task" on page 59.
Create or view to-do lists	See "Using To-Do Lists" on page 54.
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 46.
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

Operation	Description
	"Configuring User Endorsement Rating" on page 23.
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.
Set the expiry date for a task	Set the expiry date for the task in the Expiry Date field.

Task Properties

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

Property	Description
Process Instance	Process instance information if the task instance is associated to a process.
<i>Task Type</i>	The task type name of the task instance.
Task ID/Custom ID/Task Name	<p>One of the following appears based on the selected property in the Display Name field in the Administration page.</p> <ul style="list-style-type: none"> ■ The task identification number assigned to the task by the Task Engine. ■ Custom ID defined by you for the task instances. ■ Name of the task provided by you or defined by a process.
Priority	Priority defined for the task. See "Task Priority" on page 46.

Property	Description
Status	Status of the task. See "Task Status" on page 47 .
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.
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.

Property	Description
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

Action	Use this action to...
	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.
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 .

Task Status	Description
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.
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 49](#).

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 50](#). For information about rescheduling a task, see ["Rescheduling Tasks" on page 49](#).

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 provides a quick way to identify the scheduled tasks assigned to you. My calendar displays the current month by default. However, you can scroll and view your task schedules marked for later months. On My Calendar, the date colored gray is the current date, and the dates colored blue indicate the scheduled task dates. The table below lists the operations you can perform in My calendar:

To...	Do...
Refresh the calendar to display the latest changes	Click  Refresh.
Identify the dates you have scheduled tasks	Look for dates colored blue. Darker shade of blue indicates that there are more tasks scheduled on that day.
View which tasks are scheduled to start on a date	Click the date marked for scheduled tasks and view the scheduled task list.
View details, reschedule, or edit details of a scheduled task	<ol style="list-style-type: none"> 1. Click the date marked for the scheduled task. 2. Click on the task ID of the task to view the task details page. <p>For information about task details, see "Task Properties" on page 44.</p>

To...	Do...
View the current month if you have scrolled to other months	Click Today .
Scroll to the next month	Click  .
Scroll to the previous month	Click  .

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 50.
- **Start Task** option on a task type bar on **Work Stream**. See "[Using Start Task Option](#)" on page 51.

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 51.

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 51.

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 52](#).

Using Saved Searches

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

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

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

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

Action	Perform these steps...
Create a new saved search	<ol style="list-style-type: none"> 1. Click ▼ in the search field of a task list. 2. Click the Create New Search tab. 3. Select the fields and criteria for the search. Click + to add more criteria for the search. Click - to remove a search criteria. 4. Click Save Search.

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

Using To-Do Lists

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

You can create a to-do list by using a new to-do list template or by re-using an existing to-do list template. For information about configuring to-do lists, see "[Configuring To-Do List Setting](#)" on page 23.

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

<u>To...</u>	<u>You need this functional privilege...</u>	<u>See...</u>
Create, update, or delete a to-do list template	Create To-do List Template	<ul style="list-style-type: none"> ■ "Creating To-Do List Templates" on page 54 ■ "Viewing, Updating, or Deleting To-Do List Templates" on page 55
Create a to-do list	Create To-do List	<ul style="list-style-type: none"> ■ "Creating To-Do Lists" on page 56 ■ "Viewing and Updating To-Do Lists" on page 56
View to-do list template	Use Public To-do List Template	" Viewing, Updating, or Deleting To-Do List Templates " on page 55

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 57](#).
 - 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 57](#).
 - 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 57](#).

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 57](#).

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 42.

To-Do List Attributes

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

Parent Task Attributes

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

Child Task Attributes

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

Task Charting and Analyzing Task Activities

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

Editing Chart Settings

Define the chart settings in the Chart Settings dialog box.

Chart Setting	Specifies...
Saved Searches	<p>The task filter for chart results. The public and private saved searches that you defined in My webMethods are available for selection.</p> <p>Default is All My Tasks (Standard Task Inbox).</p>
Chart Type	<p>The type of chart.</p> <p>The following chart types are available for selection:</p> <ul style="list-style-type: none"> ■ Bar chart ■ Pie chart ■ Donut chart ■ Bubble chart ■ Tree chart <p>Default is Bar chart.</p>
Task Parameter	<p>The task data on which the task charting is based.</p>
Group By Task Type	<p>Whether the chart data is grouped by task type.</p> <p>The Group By Task Type option:</p> <ul style="list-style-type: none"> ■ 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.
	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 46 .
	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 60](#).
5. Click **Create New**.

New Instant Task

Field	Description
Instant Task Type	Select a task type for the instant task.
Name	Type a name for the task.
Description	Type a description for the task.
Priority	Select the priority for the task.
Expiry Date	Select the expiry date for the task.
Assign To	Select the user to whom you want to assign the task.
Queue Task Immediately	<p>Select this option if you want the task to start immediately after creation. Otherwise, the task is deferred to start later.</p> <p>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.</p>
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.

5 Using Social Guidance for Task Execution

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- Endorsement Properties in My webMethods Server 63
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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 63.
- **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 62.

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 63.

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 23.

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 63.

- **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 23](#).

- **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 67](#).

Endorsement Properties in My webMethods Server

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

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

Networking with Task Experts

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

Operations you can perform:

- View profile of an expert

- Send email to an expert

For information about how experts are identified, see ["Using Social Guidance for Task Execution" on page 61](#).

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 21](#).

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.

6 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 52.
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 42.
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.

Operation

Perform these steps...

Perform these actions on a task:

See "[Task Actions](#)" on page 46.

- Resume
- Suspend
- Assign To
- Accept For
- Resubmit
- Set Status
- Delete
- Delegate
- Remove Delegation
- Create Instant Task

7 Using Services for Business Process Guidance

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Overview

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

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

Summary of Services Available for Business Process Guidance

The following services are available:

Keyword Management

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

Task Guidance

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

Task Tagging

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

User Endorsement

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

Summary of Data Structures

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

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

Social Guidance Service URLs

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

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

Where:

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

Extracting the WSDL for Social Guidance Services

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

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

Example

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

addKeyword

Adds a new Keyword object to the database.

Input Parameters

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

Output Parameters

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

addKeywords

Adds new Keyword objects to the database.

Input Parameters

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

Output Parameters

None.

deleteKeyword

Removes a Keyword object from the database.

Input Parameters

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

Output Parameters

None.

deleteKeywords

Removes Keyword objects from the database.

Input Parameters

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

Output Parameters

None.

getKeyword

Returns a Keyword object matching the input criteria.

Input Parameters

keyword **Keyword** The Keyword object containing:

- keyword ID

Or

- keyword name and keyword type

Output Parameters

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

listKeywords

Returns the Keyword objects matching the input criteria.

Input Parameters

keywordType **String** Specify tag or skill.

Output Parameters

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

updateKeyword

Updates the name and type of a Keyword object.

Input Parameters

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

Output Parameters

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

updateKeywords

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

Input Parameters

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

Output Parameters

None.

getTaskExpertList

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

Input Parameters

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

Output Parameters

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

listSkillsByUser

Returns all the endorsements of the specified user.

Input Parameters

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

Output Parameters

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

addTagsToTask

Adds one or more tags to the specified task.

Input Parameters

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

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

Output Parameters

None.

deleteTagsFromTask

Deletes all the tags of a specified task.

Input Parameters

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

Output Parameters

None.

listTagsByTask

Lists all the tags of a specified task.

Input Parameters

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

Output Parameters

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

updateTaskTags

Updates the tags of a specified task.

Input Parameters

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

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

Output Parameters

None.

endorseUser

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

Input Parameters

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

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

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

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

Output Parameters

None.

deleteEndorsementForUser

Removes all the endorsements from a specified user.

Input Parameters

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

Output Parameters

None.

endorseUserBasedOnTask

Endorses user for task expertise.

Input Parameters

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

Output Parameters

None.

Keyword

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

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

Guidance

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

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

Endorsement

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

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

A Admin User Reference

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

To...	Use this menu item...	Do...
Configure the Integration Server and Task Engine to which Business Console must connect	Administer Business Console	See " Configuring Integration Server and My webMethods Server for Business Console " on page 20.
Configure a Twitter account for Business Console	Administer Business Console	See " Configuring Business Console with Twitter " on page 21.
Configure user endorsement	Administer Business Console	See " Configuring User Endorsement Rating " on page 23.
Configure to-do lists	Administer Business Console	See " Configuring To-Do List Setting " on page 23.
Configure task type display	Administer Business Console	See " Configuring Task Type Setting " on page 24.
Configure Work Stream	Administer Business Console	See " Configuring Work Stream " on page 25.
Manage task types using My webMethods	Administer Tasks	See " Managing Task Types Using My webMethods " on page 25.
Customize the user interface	Customize Business Console	See " Customizing Business Console " on page 25.
Program user endorsement		Use the web services available for business process guidance. See " Configuring User Endorsement Rating " on page 23 and " Using "

<u>To...</u>	<u>Use this menu item...</u>	<u>Do...</u>
		Services for Business Process Guidance on page 67.

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  .
Filter and view process types and task types	What's Happening Now > Work Stream	Use the filter field to search and view the process types and task types. By default, you can view all the process types and task types.
View process instances grouped by status (Keylinks)	What's Happening Now > Work Stream	<ol style="list-style-type: none"> 1. Click on the process bar to view the keylinks 2. Click on the keylink pertaining to the status of process instances you want to view.
Filter process instances	What's Happening Now > Work Stream	<ol style="list-style-type: none"> 1. Click on the process bar to view the keylinks. 2. Click on the keylink pertaining to the status of process instances you want to view. 3. Search and view the process instances in the process list.
View process instance details	What's Happening Now > Work Stream	<ol style="list-style-type: none"> 1. Click on the process bar to view the keylinks.

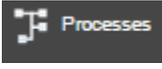
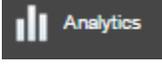
To...	Navigate to...	Do...
		<ol style="list-style-type: none"> 2. Click on the keylink pertaining to the status of process instances you want to view. 3. Search and view the process instances. 4. Click on the custom ID link corresponding to the process instance, and view the process instance details 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.
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 50.
Schedule task	Instant Task tab on the left margin or What's Happening Now > Work Stream	See " Scheduling Tasks " on page 48.

To...	Navigate to...	Do...
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 51.
Search for tasks in task list	What's Happening Now > Work Stream	<ol style="list-style-type: none"> 1. Expand the task type bar. 2. Use the search field to search tasks. See "Searching for Task Instances" on page 52.
Create and use to-do lists	What's Happening Now > Work Stream	See " Using To-Do Lists " on page 54.
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 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.

To...	Navigate to...	Do...
Tag tasks	What's Happening Now > Work Stream > Task List > Summary	Type the new tag in the Tags field.
Create an instant task	What's Happening Now > Work Stream > Task List or What's Happening Now > Activity Stream	Click Create Instant Task option.
Add comments to a task	What's Happening Now > Work Stream > Task List > Summary or What's Happening Now > Activity Stream	<ol style="list-style-type: none"> 1. Type the comment for the task. 2. Click Post.
Add attachments to a task	What's Happening Now > Work Stream > Task List > Summary or What's Happening Now > Activity Stream	<ol style="list-style-type: none"> 1. Select the task instance in task list, and type your comment for the task. 2. Click  Add Attachments. 3. Click Attach.
Reply to a comment, email the user who commented for a task, or delete a comment	What's Happening Now > Activity Stream	See " Collaborating Task Activities " on page 58.
Endorse users for a task	What's Happening Now > Work Stream > Task List > Summary	See " Configuring User Endorsement Rating " on page 23 and " Using Services for Business Process Guidance " on page 67.
Visualize task data and analyze task activity	What's Happening Now > Task Activity	See " Task Charting and Analyzing Task Activities " on page 58.
View user profile, roles, and group memberships	Update Profile option in the administration menu	See " Viewing and Updating Your Profile " on page 17.

To...	Navigate to...	Do...
Edit user profile	Update Profile option in the administration menu	See " Viewing and Updating Your Profile " on page 17.
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 64.
Network with task experts	What's Happening Now > Task Experts	See " Networking with Task Experts " on page 63.
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 65.
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 <i>Working with Business Process Dashboards</i> .
	View the unaccepted tasks.
	View the tasks that are expiring today.
	View/hide the process type information in Work Stream.
	View/hide the task type information in work Stream.
	View/hide the keylinks of a task type in Work Stream.
	<ul style="list-style-type: none"> ■ View/hide Task Instances panel in process detail page. ■ Create instant task in Activity Stream.
	<ul style="list-style-type: none"> ■ View/hide Activity Stream panel in process detail page. ■ View/hide Comments panel in task detail page.
	<ul style="list-style-type: none"> ■ View/hide Attachments panel in process detail page.

Icon/Image	Click to...
	<ul style="list-style-type: none">■ View/hide Attachments panel in task detail page.■ Add attachments to a task in Activity Stream.
	<ul style="list-style-type: none">■ Configure setting or perform actions in:■ 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 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, and task experts.

Access Privilege Required

Monitoring > Business > Tasks > Task List Management

Task Type Permissions Required

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

Permissions for Task Management

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

<u>Task Management Operation</u>	<u>Functional Permissions Required</u>
Perform task actions	Task Management > <i>Specific permissions for task actions</i>
Start a task	Tasks Administration > Task 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 Application Root Page > Task InboxPage

Permissions For Task Collaboration

You need Task Collaboration permission for task types to work in an collaborative environment. This section lists the permissions you need in addition to the basic permissions to perform task collaboration operations.

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

<u>Task Management Operation</u>	<u>Privileges Required</u>	<u>Task Type Permissions Required</u>
	Task Email Listener Administration	

Permissions For Process Management

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

- Monitoring > Business > Process Instances
- Administration > Business > Business Processes

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 > 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 dashboards :

- Gadget > Basic > View Object

For assigning gadget permissions, see "[Assigning Access Permissions For Gadgets](#)" on [page 34](#).