

Working with webMethods Business Console

Version 9.7

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This document applies to Business Console Version 9.7 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-based administration and monitoring user interface for managing business processes. Business Console provides you consolidated and detailed views, 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:

- General terminology and usage of My webMethods. For more information, see the PDF publication *Working with My webMethods*
- 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*.

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 (+).
<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.

Convention	Description
	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 (...).

Documentation Installation

You can download the product documentation using the Software AG Installer. The documentation is downloaded to a central directory named `_documentation` in the main installation directory (SoftwareAG by default).

Online Information

Software AG Documentation Website

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

Software AG Empower Product Support Website

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

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

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

Software AG TECHcommunity

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

- Access product documentation, if you have TECHcommunity credentials. If you do not, you will need to register and specify "Documentation" as an area of interest.
- Access articles, 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 What is Business Console?

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webMethods Business Console is a web-based, role-based monitoring and social guidance tool for managing the business processes and tasks configured in My webMethods Server.

Business Console provides a dashboard functionality for your business processes and tasks. It is built on responsive web design framework, and provides optimal viewing experience on tablets.

The user interface for Business Console is launched using My webMethods Server.

Business Console Features

Features available to you in Business Console depends on the access and functional privileges assigned to you as a My webMethods Server user.

In Business Console, you can:

- Monitor business processes and tasks at real-time using your browser
- Manage task assignment and execution
- Share task comments and attachments, and collaborate task execution
- Use social guidance to improve business processes
- Identify user expertise and endorse users
- Network with task experts
- View trending information related to business processes on social media
- Connect to remote Integration Server and Task Engine

Administrator Features

Only users with administrator privileges can perform the Business Console configuration tasks by using the administrative menu available on the right corner of the Business Console title bar.



To...	Use this menu item...	Do...
Configure the Integration Server and Task Engine to which Business Console must connect	Administration	See " Configuring Integration Server and My webMethods Server for Business Console " on page 50.
Configure a Twitter account for Business Console	Administration	See " Configuring Business Console with Twitter " on page 51.



<u>To...</u>	<u>Use this menu item...</u>	<u>Do...</u>
Configure the rating for user endorsement	Administration	Set the value for Maximum User Endorsement Rating . See " Configuring User Endorsement Rating " on page 52.
Manage task types using My webMethods	Task Administration	See " Managing Task Types Using My webMethods " on page 53.
Program user endorsement		Use the web services available for business process guidance. See " Configuring User Endorsement Rating " on page 52 and " Using Services for Business Process Guidance " on page 55.


User Features


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

<u>To...</u>	<u>Navigate to...</u>	<u>Do...</u>
Filter and view process types and task types	What's Happening Now > Process Stream	Use the filter option to search and view the process types and task types. By default, you view all the process types and task types.
View process instances grouped by status (Process badges)	What's Happening Now > Process Stream	<ol style="list-style-type: none"> 1. Click on the process bar to view the process badges. 2. Click on the process badge pertaining to the process instances you want to view.

To...	Navigate to...	Do...
Filter process instances	What's Happening Now > Process Stream	<ol style="list-style-type: none"> 1. Click on the process bar to view the process badges. 2. Click on the process badge pertaining to the process instances you want to view. 3. Search and view the process instances.
View process instance details	What's Happening Now > Process Stream	<ol style="list-style-type: none"> 1. Click on the process bar to view the process badges. 2. Click on the process badge pertaining to the process instances you want to view. 3. Search and view the process instances. 4. Click Process Detail corresponding to the process instance, and view the process instance details in My webMethods.
<p>Check if a task type is enabled for:</p> <ul style="list-style-type: none"> ■ Starting ■ Collaboration 	What's Happening Now > Process Stream	Check the status on the task type bar.
View task types belonging to a process type	What's Happening Now > Process Stream	Click  Expand on the process type bar.
View task instances grouped by task type	What's Happening Now > Process Stream	Click  Expand on the task type bar.

To...	Navigate to...	Do...
Create and start a task instantly	Instant Task tab on the left margin	See " Creating and Starting a Task Instantly " on page 26.
View task instances grouped by saved search (Keylinks)	What's Happening Now > Process Stream	Click on the task bar to view the customized keylinks.
Customize task keylinks (saved searches)	What's Happening Now > Process Stream	Select the Customize Keylinks option on the task type bar and configure the keylinks. See " Customizing Task Keylinks " on page 22.
Filter and view task list	What's Happening Now > Process Stream	<ol style="list-style-type: none"> 1. Click  Expand on the task type bar. 2. Search and view the tasks.
Configure task instances	What's Happening Now > Process Stream > Task List	Click  Settings.
View task instance details such as tags, attachments, comments, experts, and audit information of a task	What's Happening Now > Process Stream > Task List	Click the task ID link of the task instance and select the Task Detail tab.
View business data of task instance	What's Happening Now > Process 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 > Process Stream > Task List > Task Detail	Select the priority from the drop-down list.
Tag tasks	What's Happening Now > Process Stream > Task List > Task Detail	Type the new tag in the Tags field.

To...	Navigate to...	Do...
Create child task	What's Happening Now > Process Stream > Task List or What's Happening Now > Activity Stream	Click Create Child Task option.
Add comments to a task	What's Happening Now > Process Stream > Task List > Task Detail 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 > Process Stream > Task List > Task Detail or What's Happening Now > Activity Stream	<ol style="list-style-type: none"> 1. Select the task instance in Process Stream, 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 " Task management capabilities available only in Activity Stream " on page 38.
Endorse users for a task	What's Happening Now > Process Stream > Task List > Task Detail or	See " Configuring User Endorsement Rating " on page 52 and " Using Services for Business Process Guidance " on page 55.
Visualize task data and analyze task activity	What's Happening Now > Task Activity	See " Task Charting and Analyzing Task Activities " on page 35.
View user profile, roles, and group memberships	What's Happening Now > Get Connected or Profile option in the administrative menu	See " Viewing and Updating Your Profile " on page 18.

To...	Navigate to...	Do...
Edit user profile	What's Happening Now > Get Connected or Profile option in the administrative menu	See " Viewing and Updating Your Profile " on page 18.
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 41.
Network with task experts	What's Happening Now > Task Experts	See " Networking with Task Experts " on page 43.
Filter and view tasks, accept tasks, delegate tasks, or remove delegation from tasks in your inbox	Inbox tab	See " Managing Your Inbox " on page 45.
Customize task list in Process Stream and Inbox	What's Happening Now > Process Stream > Task List or 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.

2 Getting Started

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Pre-Requisites

Before you begin, make sure that:

- The following products are installed and configured:
 - webMethods Integration Server
 - webMethods Task Engine
 - webMethods Process Engine
 - My webMethods Server
 - webMethods Monitor
 - webMethods Database Component Configurator
- The Task Engine environment is configured. For configuration information, see *webMethods Task Engine User's Guide*.
- You have user account in My webMethods Server and the privileges to work in the Task Engine environment. See "[Users, Roles, and Groups](#)" on page 18.

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

Users require functional privileges for Task Engine and ACL privileges for Integration Server and Monitor.

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. Do one of the following to view your profile details:
 - Navigate to **What's Happening Now > Get Connected** and click **Build Your Profile**.

- Use the **Profile** option in the administrative menu available on the Business Console title bar.
2. To edit the profile fields, type the new values, and click **Save**.
 3. To change the profile picture, click **Upload 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 administrative menu located on the Business Console title bar.
2. Click **Logout**.

3 Managing Process Types and Task Types

- Operations You Can Perform Using Process Stream 22
- Process Instance Statuses 22
- Customizing Task Keylinks 22

In Business Console, you can manage the business process types (process models) and task types created in Software AG Designer and published to the run-time environment in My webMethods Server.

Process Stream in the **What's Happening Now** contains stacked bars for:

-  Process types
-  Task types of standalone tasks

Operations You Can Perform Using Process Stream

- View process types and task types
- View process instances and task instances grouped by type and project
- Search for process types, task types, process instances, and task instances
- View process instances grouped by the status badges
- View process instance details
- View task instances of a process
- View the task instance details and business data

Process Instance Statuses

Process Status	Determines
Running	Process instance is started, running, or revised.
Failed	Process instance has failed.
Completed	Process instance has completed or stopped.
Other Status	Process instance status is other than the ones mentioned above.

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	Select the check box corresponding to the keylink, and click Save .

4 Managing Tasks

- Operations You Can Perform in Task List 26
- Creating and Starting a Task Instantly 26
- Configuring Task Instances 26

To apply various task management actions to the tasks in the Task List, a task must have a status of Active, Error, or Suspended. You cannot apply task list management actions to tasks with a status of Canceled, Completed, or Expired.

Operations You Can Perform in Task List

- Configure task instances
- View business data of tasks
- Create child task instances
- Manage attachments and comments of task instances
- View task experts
- Assign task instances to other users or experts
- Tag tasks
- View audit information of task instances

Creating and Starting a Task Instantly

Use the following procedure to queue a task, that is to create a task and start it immediately.

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** to queue a new task instance.
4. Input the values for the new task, if the portlet for start task (or queue task) is defined for the task type.
5. Click **Start Task**.

Configuring Task Instances

After you modify the task properties and actions, apply or save the changes.

Task Operations

Operations you can perform on the tasks listed in Task List:

<u>Operation</u>	<u>Perform these steps in the task list...</u>
View the following information pertaining to a task <ul style="list-style-type: none">■ Task details■ Business data■ Status■ Priority■ Attachments■ Comments■ Tags■ Experts■ Audit information	Click the task ID link for the task.
Perform actions on a task	Select a action from the Actions list. See "Task Actions" on page 28 .
Change the priority of a task	<ol style="list-style-type: none">1. Click the task ID link for the task.2. Select the priority for the task (None, Low, Medium, High, Critical) from the Priority list.
Endorse users for the task	<ol style="list-style-type: none">1. Click the task ID link for the task.2. In the Task Details tab, Click Endorse and provide the endorsement rating for the users.
View or post task comments	<ol style="list-style-type: none">1. Click the task ID link for the task.2. View or post comments in the Comments panel.
View or post task attachments	<ol style="list-style-type: none">1. Click the task ID link for the task.2. View or post attachments in the Attachments panel.
View task experts, email tasks experts, or assign a task to a task expert	<ol style="list-style-type: none">1. Click the task ID link for the task.

Operation	Perform these steps in the task list...
	<ol style="list-style-type: none"> In the Task experts panel, select the expert and perform the required action.
Add tags for a task	<ol style="list-style-type: none"> Click the task ID link for the task. In the Task Details tab, type new tags in the Tags field.
Set the expiry date for a task	<ol style="list-style-type: none"> Click the task ID link for the task. In the Task Details tab, set the expiry date for the task in the Expiry Date field.

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 will appear on the user's My Inbox.
Accept For	Accept a task on behalf of one or more users or roles. The task will appear in each individual user's inbox as an accepted task.

Action	Use this action to...
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, and Expired.
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 Child Task	Opens the New Collaboration Task dialog box.

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 specified for immediate start. Immediately after a task starts, the status transitions from New to Active .
Active	The task is running normally and is available for user interaction.
Completed	The task is complete. No further work can be done on a task that is completed, other than deleting it.
Error	The task has transitioned to an error condition. No further work can be done on a task that is in Error status, other than deleting it.
Canceled	The task is canceled. No further work can be done on a task that is canceled, other than deleting it.

Task Status	Description
Suspended	The task is suspended. A suspended task can be resumed or placed back into Active status by a manual user action or as the result of a task event evaluation.
Expired	The task has expired as a result of a manual action by a user or as a result of a task event evaluation.

5 Endorsing Users

■ Endorsement Methods	32
■ Endorsement Properties in My webMethods Server	33

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 List page and in the **Task Experts** panel.
- **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 43.
- **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 for the user. For information about how user endorsements can be done, see "[Endorsement Methods](#)" on page 32.

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 33.

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 33.

- **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 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 will 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 52.

- **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 55.


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.

6 Task Charting and Analyzing Task Activities

■ Editing Chart Settings	36
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webMethods Business Console provides task charting in 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  **Edit Chart Settings** 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.

7 Collaborating Task Execution

■ Creating a Child Task	38
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Collaboration tasks (child tasks) enable a collaborative work environment for completing the parent task. Child tasks of parent tasks enabled for collaboration can share comments and attachments.

Collaboration task management capabilities available in the Task Detail tab and Activity Stream

Click...	To...
	Refresh the Activity Stream content to display the real time changes.
	Post a global comment or task-specific comment.
	View the New Collaboration Task dialog box and create a new child task.
	View the Task Attachment dialog box and attach one or more files to the task.

Task management capabilities available only in Activity Stream

Apart from the task collaboration capabilities specified in "[Collaboration task management capabilities available in the Task Detail tab and Activity Stream](#)" on page 38, you have these capabilities in the **Activity Stream**.

Click...	To...
	Show older posts in Activity Stream.
	Reply to a comment for a task type.
	Draft an email in the E-mail dialog box and email the user, who wrote the comment.
	Remove a comment from a task.

Creating a Child Task

Child tasks of a process are collaboration tasks that enable sharing of comments and attachments.

To create a child task

1. Make sure the parent task for which you want to create a child task is enabled for collaboration.
2. In Activity Stream, select the parent task.
3. Click **Create Child Task** icon.
4. In the New Collaboration Task dialog box, specify the field values for the new child task. See the field descriptions in "[New Collaboration Task](#)" on page 39.
5. Click **Create New**.

New Collaboration Task

Field	Description
Collaboration Task Type	Select a task type to create a collaboration task.
Name	Type a name for the child task.
Description	Type a description for the child task.
Priority	Select the priority for the task.
Expiration 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 the check box 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>

8 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 51.

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. You will get "Rate limit exceeded" exception if you make frequent search requests.

9 Networking with Task Experts

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 ["Endorsing Users" on page 31](#).



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

10 Managing Your Inbox

- Task Filters 46

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

Operations you can perform in Inbox:

Operation	Perform these steps...
View tasks grouped by task type	<p>Select the task type to view all of the tasks of a specific task type or select My Inbox to view your task inbox.</p> <p>My Inbox displays all of the tasks assigned to you based on your individual user account, or your group/role membership, or assignment done by other users.</p>
Filter tasks	<p>Select the filter option from the Task Filter list.</p>
View the unaccepted tasks	<p>Click  on the Business Console title bar</p>
View the tasks expiring today	<p>Click  on the title bar.</p>
Accept tasks	<p>Click Accept corresponding to the task in the task list.</p>
Delegate task(s)	<p>Select Delegate from the Actions menu and select the user to whom you want to delegate the task.</p>
Remove delegation from task(s)	<p>Select Remove Delegation from the Actions menu.</p>

Task Filters

You can search for tasks using any of the following searches saved in My webMethods Server.

- All My Tasks
- My Critical Tasks
- New Tasks This Week

- My Accepted Tasks
- Tasks That Expire Today
- All Tasks
- Critical Tasks
- This Week's Tasks

11 Administering Business Console

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Configuring Integration Server and My webMethods Server for Business Console

Only users with administrator privileges can use the **Administration** menu option in Business Console's administrative menu to specify the Integration Server and Task Engine for Business Console. Specify the values for the following fields:

Field	Specify...
Integration Server URL	<p>URL of the Integration Server that Business Console must connect to. For example, <code>http://localhost:5555</code>.</p> <p>Make sure that Process Engine is configured in the Integration Server.</p> <p>Important: 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 50.</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 following with the Task Engine:</p> <ul style="list-style-type: none"> ■ My webMethods Server ■ My webMethods ■ Monitor <p>Important: 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 50.</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 52](#).

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

Fields	Description
Enable	Select this option to enable searching and viewing the task related posts on Twitter.
Consumer Key, Consumer Secret, Access Token, and Access Token Secret	Provide the corresponding values you obtained from the Twitter website. For registering your Business Console application in the Twitter website and obtaining values for the parameters, see "Creating Twitter Account for Business Console" on page 52 .

Fields	Description
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 51](#).

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
```
 - 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 **Administration** menu option in Business Console's administrative menu to specify a value for the **Maximum User Endorsement Rating** field.

The value you specify in the **Maximum User Endorsement Rating** field defines the maximum endorsement rating a user can grant to another user. The default value is 1.

For information about endorsing users, see ["Endorsing Users" on page 31](#).

Managing Task Types Using My webMethods

Only users with administrator privileges can use the **Task Administration** menu option in Business Console's administrative 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*.

12 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 done for a user.

For managing the tags, use the tagging services available for Task Engine. See *webMethods Task Engine API and Service Reference*.

Summary of Services Available for Business Process Guidance

The following services are available:

Task Guidance

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

User Endorsement

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

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

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.

endorseUser

Endorses user for the specified task tags.

Input Parameters

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

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

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

Output Parameters

None.

deleteEndorsementForUser

Removes all the endorsements from a specified user.

Input Parameters

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

Output Parameters

None.

endorseUserBasedOnTask

Endorses user for task expertise.

Input Parameters

rating **Integer** Numeric rating for endorsing the user for all the tags associated with the task.

taskID **String** ID of the task for which the user is being endorsed.

Output Parameters

None.

Guidance

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












Element	Description
<i>displayName</i>	String Displayable name of the expert user.
<i>rating</i>	Double Rating of the expert user.
<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 Icon Reference

Icon/Image	Description
	Unaccepted tasks.
	Expiring tasks.
	Process type.
	Task type.
	Display search results.
	Expand the process type or task type bar.
	Collapse the process type or task type bar.
	Expand the view.
	Collapse the expanded view.
	Configure setting.
	Refresh content to display the real time changes.