

Working with My webMethods

Version 9.7

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This document applies to My webMethods 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 My webMethods, a Web-based administration and monitoring user interface for managing your webMethods components. It provides procedures for navigating and using the basic features of My webMethods, including how to access pages for webMethods components and how to use workspaces.

For a list of webMethods components and associated tasks that are available in My webMethods, see the table in "[Application Selections Available in the Navigate Tab](#)" on [page 22](#). For complete information about how to perform the tasks that use these webMethods components, see the appropriate guide for the component. The table that lists the available tasks also includes the titles of the guides where you can find more information about a tasks.

Software AG Command Central

Software AG Command Central is a tool that release managers, infrastructure engineers, system administrators, and operators can use to perform administrative tasks from a single location. Command Central can assist with the following configuration, management, and monitoring tasks:

- Infrastructure engineers can see at a glance which products and fixes are installed, and where. Engineers can also easily compare installations to find discrepancies.
- System administrators can configure environments using a single web UI, command-line tool, or API so maintenance can be performed with a minimum of effort and risk.
- Release managers can prepare and deploy changes to multiple servers using command-line scripting for simpler, safer lifecycle management.
- Operators can monitor server status and health, as well as start and stop servers from a single location. They can also configure alerts to be sent to them in case of unplanned outages.

For more information about Software AG Command Central, see the Command Central documentation.

Document Conventions

Convention	Description
Bold	Identifies elements on a screen.

Convention	Description
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.
	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 Logging Into and Logging Out of My webMethods

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About Logging Into and Out of My webMethods

My webMethods is a Web-based, monitoring and administration user interface for managing your webMethods components. When you log into My webMethods, you are logging into all webMethods components that are incorporated into My webMethods. Your user name and password will be the same for all underlying webMethods components.

For example, if you have and webMethods Optimize for Process installed, when you log into My webMethods, the system automatically logs you into both webMethods Monitor and Optimize for Process with a single login. When you log out of My webMethods, My webMethods logs you out of all underlying webMethods components.

Logging Into My webMethods

My webMethods has a user interface that you access via a Web browser.

Important: Because My webMethods uses JavaScript and cookies, you must ensure that your Web browser is set up to allow cookies and allow JavaScript to execute. For more information about how to verify that your Web browser settings, see the help for your Web browser.

To log into My webMethods

1. Access the My webMethods Login page by entering a URL in a Web browser:

`http://host:port`

where:

- *host* is the host name of the machine on which My webMethods Server is installed.
- *port* is the port on which My webMethods Server listens for incoming requests. The default port for My webMethods is 8585.

For example, if the host name is `rubicon.company.com` and it uses the default port (i.e., 8585), enter the following URL:

`http://rubicon.company.com:8585`

2. On the Login page, type your My webMethods user name and password. The user name is case insensitive.

Note: When logging in, the value you specify in the user name is case insensitive. However, after logging in, My webMethods uses the case of the user name that is defined in your user account. For example, if the user account is defined as “Administrator”, you can log in using “administrator”. When My webMethods

needs to use the user name, for example, for HTTP authentication, it will use the version defined in the user account, which is "Administrator".

Note: For instructions about how to change your My webMethods password, see ["Changing Your Password" on page 13](#).

3. Click **Login**.

The first time you log in, My webMethods displays the Welcome workspace. On subsequent logins, the page My webMethods displays depends on your user preferences. For more information, see ["My webMethods User Preferences" on page 46](#) and ["Setting Your User Preferences" on page 45](#).

My webMethods provides an extremely flexible framework for granting or restricting user access to virtually every aspect of the My webMethods interface. Administrators assign permissions known as access privileges and functional privileges.

- Access privileges define the application pages you can display. If this guide lists pages and/or menu items that you cannot access, it is likely because you do not have the access privileges to view the page.
- Functional privileges define the actions you can perform in My webMethods. If this guide lists user interface controls (for example, buttons) that you do not see, it is likely because you do not have the functional privileges to perform the actions associated with the user interface controls.

If you have any questions about your access and functional privileges, talk to your My webMethods administrator.

Logging Out of My webMethods

Perform the following procedure to log out of My webMethods.

To log out of My webMethods

- Click the **Logout** link, which is located at the top of all My webMethods pages.

Changing Your Password

Change your password by editing the fields on the **User Information** tab of your profile.

Note: You can only use this procedure to change your password if the user account is defined in My webMethods; that is, the "System" directory service. If your user account is defined in an external directory management system, for example LDAP, you must change the password from the external directory management system.

To change your My webMethods password

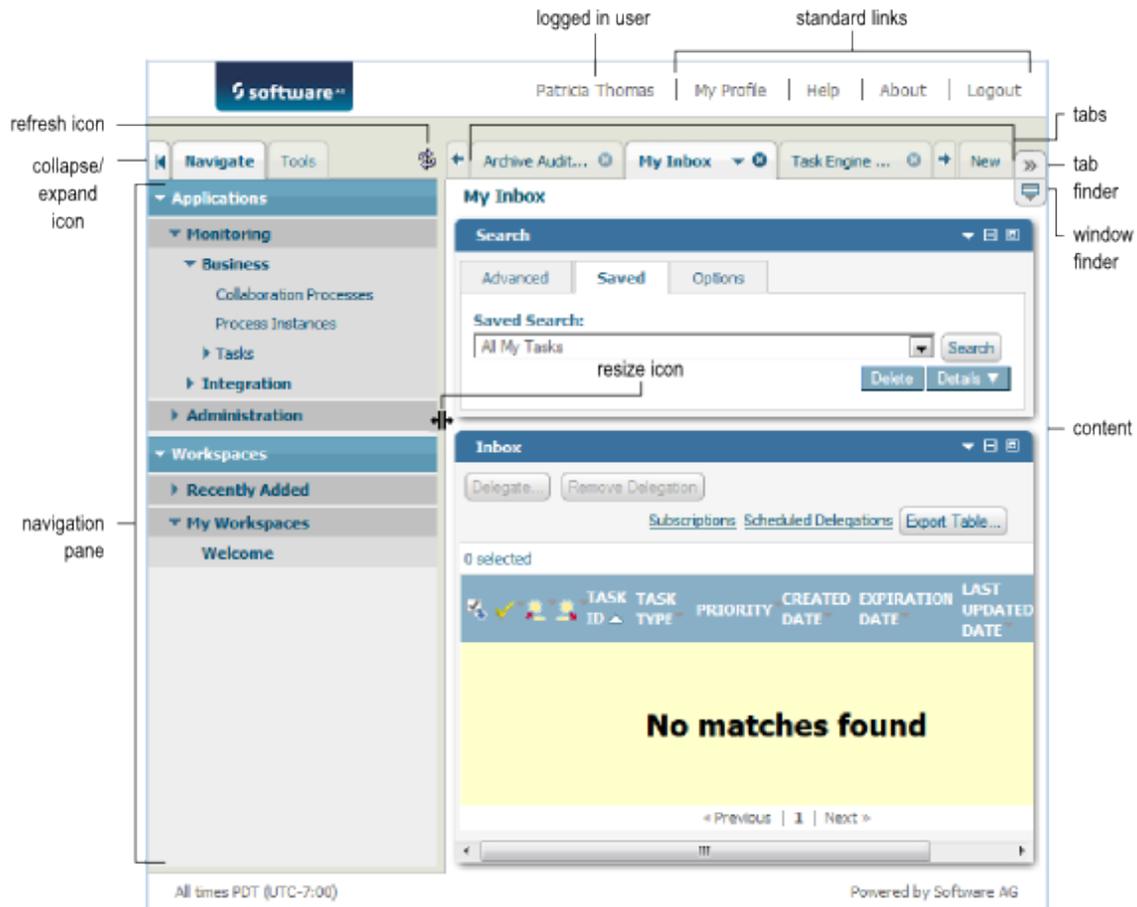
1. Click the **My Profile** link, which is located at the top of all My webMethods pages.
2. On the **User Information** tab, type your new password in the **Password** field.
3. In the **Confirm Password** field, type your new password again for confirmation.
4. Click **Save**.
5. If you do not need to make any further changes to the profile, click  on the **My Profile** tab to close the page.

2 Familiarizing Yourself with My webMethods

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My webMethods User Interface

The following shows a sample of the My webMethods user interface:



logged in user My webMethods always displays the user name of the logged in user at the top of the page.

standard links The *standard links* provide access to your My webMethods profile and information about the version of My webMethods and the webMethods products in use. There is also a standard link to log out of My webMethods. My webMethods always displays standard links at the top right of the page. For more information, see "[Standard Links](#)" on page 18.

refresh icon Click this icon to have My webMethods refresh the navigation pane.

collapse/ expand icon	This icon hides and restores the navigation pane. For more information, see "Resizing the Content Area and Navigation Pane" on page 18.
navigation pane	The <i>navigation pane</i> contains two tabs: <ul style="list-style-type: none">■ Navigate tab to provide access to application pages and workspaces. For more information, see "Navigation Pane" on page 21, "Application Selections Available in the Navigate Tab" on page 22, and "Workspace Selections in the Navigate Tab" on page 33.■ Tools tab, which lists resources that users can add to workspaces. For more information, see "Navigation Pane" on page 21 and "Workspace Tools Section of the Tools Tab" on page 37.
tabs	My webMethods displays a tab for each open application page and workspace. To make an application page or workspace the current page so that you can view it, you click its tab. For more information, see "Tabs" on page 19.
New tab	The New tab allows you to quickly create a new workspace. For more information, see "Creating New Empty Workspaces" on page 53.
tab finder	The <i>tab finder</i> allows you to navigate to open tabs. This control is useful when you have many open tabs, and as a result, some are not visible. For more information, see "Displaying a Page When its Tab is Not Visible" on page 20.
resize icon	The resize icon allows you to resize the navigation pane and content area. This icon is not always visible. My webMethods displays the resize icon when you place your mouse in the gap between the navigation pane and the content area. For more information, see "Resizing the Content Area and Navigation Pane" on page 18.
content	The area where My webMethods displays the content of an application page or workspace. For more information, see "Format of Application Pages" on page 38 and "Format of Workspace Pages" on page 39.
window finder	The <i>window finder</i> allows you to make a window that is open in a workspace the current window. This control is useful when you have many open windows. For more information, see "Finding Windows in a Workspace" on page 71.

Resizing the Content Area and Navigation Pane

If you need more space for the page content, you can increase its size by reducing the size of the navigation pane or by completely hiding the navigation pane, allowing the content area to use the entire width of the web browser window.

To resize the content area and navigation pane

1. To make the content area wider while making the navigation pane narrower:
 - a. Move your mouse to the gap between the navigation pane and the content area.
My webMethods displays the resize icon, .
 - b. Click  and drag it to the left to increase the size of the content area, while making the navigation pane narrower.
2. To make the navigation pane wider while making the content area narrower:
 - a. Move your mouse to the gap between the navigation pane and the content area.
My webMethods displays the resize icon, .
 - b. Click  and drag it to the right to increase the size of the navigation pane, while making the content area narrower.
3. To hide the navigation pane completely allowing the content area to use the entire width of the web browser window, click the collapse icon, , which is on the left of the **Navigate** tab.
4. To restore the navigation pane so that it is visible again, click the expand icon, , which is on the left side of the page.

Standard Links

The following table describes the standard links that appear at the top of every page of My webMethods.

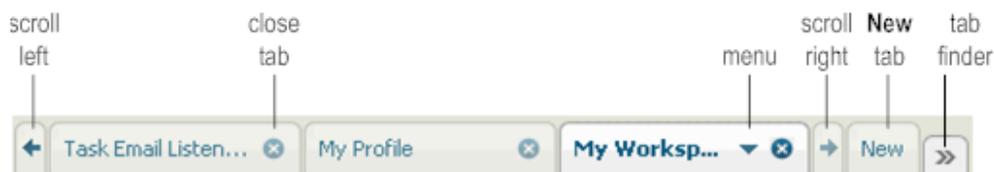
Use this link...	To...
My Profile	Access your profile. You use your profile to change your password and specify user information, and preferences. For more information about your profile, see " Viewing and Updating Your My webMethods Profile " on page 41.
Help	Indicates where to find documentation for the webMethods components that are incorporated into My webMethods.

Use this link...	To...
About	Lists the version of My webMethods and information about the webMethods components that are in use with My webMethods.
Logout	Log out of My webMethods. For more information, see " Logging Out of My webMethods " on page 13.

Tabs

My webMethods displays tabs above the content area for each open application page and workspace. The tab lists the name of the application page or workspace.

The following illustrates features of the tabs:



scroll left and scroll right	My webMethods displays the scroll arrow tabs when the width of the content area is too narrow to fit the tabs for all open application pages and workspaces. Use the arrow tabs to scroll left and right to view additional tabs. For more information, see " Displaying a Page When its Tab is Not Visible " on page 20.
close tab	My webMethods displays the Close icon on all tabs. Click this icon to close the application page or workspace, and as a result, remove the tab. For more information, see " Closing Tabs " on page 20.
menu	My webMethods displays the menu icon on the current tab. The menu items that are available will differ based on whether it is a tab for an application page or a workspace.
New tab	The New tab allows you to quickly create a new workspace. For more information, see " Creating New Empty Workspaces " on page 53.
tab finder	The tab finder allows you to navigate to open tabs. This control is useful when you have so many open tabs that some are no longer visible. For more information, see " Displaying a Page When its Tab is Not Visible " on page 20.

Closing Tabs

When you no longer need an application page or workspace open, you can close the tab associated with that page or workspace.

To close tabs

- To close a single tab that is not the current tab, click  **Close** on the tab you want to close.
- To close a single tab that is not currently visible, open the tab finder by clicking  and then click  in the tab finder for the tab you want to close.
- To close the current tab, you can use either of the above methods, or you click  **Menu** on the current tab and select **Close**.
- To close all tabs except the current tab, on the current tab click  **Menu** and select **Close All Others**.

Displaying a Page When its Tab is Not Visible

When you have many application pages and workspaces open, My webMethods might be unable to display the tabs for all the open pages. You can display the application page or workspace associated with a hidden tab by either scrolling the tabs or by using the tab finder control.

To display a page when its tab is not visible

1. If you know that tab is to the left of the currently visible tabs, click the left arrow tab  to scroll the tabs to the left. When the tab for the application page or workspace you want to view is visible, click it to make it the current page.
2. If you know that tab is to the right of the currently visible tabs, click the right arrow tab  to scroll the tabs to the right. When the tab for the application page or workspace you want to view is visible, click it to make it the current page.
3. If you are unsure where the tab is located or want to quickly and easily locate any tab, use the tab finder:
 - a. Click the tab finder icon .
 - b. Select the page you want to view from the list.

Re-arranging the Order of the Tabs

You can re-arrange the tabs by dragging a tab to a new location in the tab list.

Navigation Pane

The navigation pane is on the left side of the user interface. It contains two tabs: the **Navigate** tab and the **Tools** tab.

On the **Navigate** tab, My webMethods highlights the entry for the application page or workspace that it is currently displaying in the content area.



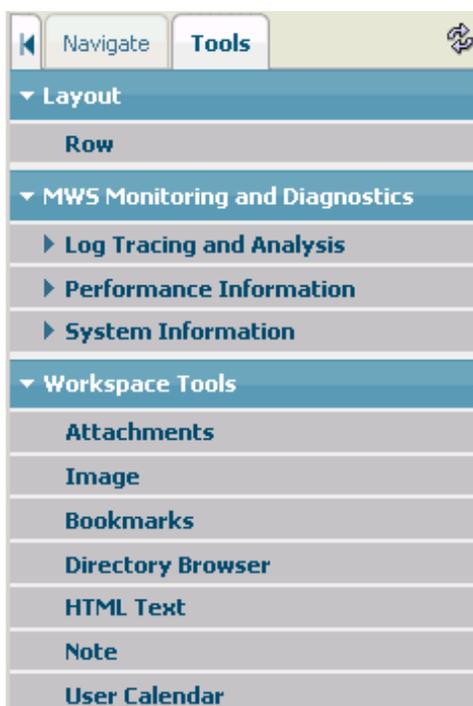
The **Navigate** tab has two sections: **Applications** and **Workspaces**.

The **Applications** section provides access to the application pages, and it is further divided into two sections: the **Monitoring** section, which lists pages for monitoring webMethods components and **Administration**, which lists pages that allow you to administer webMethods components.

The selections in the **Applications** section might differ based on the webMethods products installed and the permissions you are assigned. Additionally, My webMethods administrators can add custom pages to the navigation. For information about the **Applications** section, see ["Application Selections Available in the Navigate Tab" on page 22](#). For information about permissions management and customizing the navigation, see *Administering My webMethods Server*.

The **Workspaces** section provides access to workspaces. You can add entries to the navigation for workspaces that you have created and/or workspaces that other users have created and have shared with you. For more information about workspaces, see ["Working with My webMethods Workspaces" on page 51](#).

The **Tools** tab lists resources that users can add to workspaces.



The selections listed in the **Tools** tab might differ based on the permissions you are assigned. Additionally, My webMethods developers can add additional tools that are specific to your site.

As installed My webMethods provides tools in the **Workspace Tools** section of the tab. For information about the selections in the **Workspace Tools** section, see ["Workspace Tools Section of the Tools Tab" on page 37](#). For information about permissions management and customizing the tools, see *Administering My webMethods Server*.

Application Selections Available in the Navigate Tab

The selections in the **Applications** section of the **Navigate** tab in My webMethods are determined by both the following:

- **webMethods components that are installed.**
- **Functionality to which you have been granted access.** For more information, see *Administering My webMethods Server*.

The following sections list the possible **Monitoring** and **Administration** selections that are available in the **Navigate** tab, provides a description of each selection, and indicates the webMethods component(s) required for My webMethods to include the selection in the navigation pane.

Note: For a list of the webMethods components you have installed, click the **About** link, which is one of the standard links at the top of all My webMethods pages.

Monitoring Section of the Navigate Tab

The following tables list all possible selections in the **Monitoring** section of the **Navigate** tab along with the webMethods component(s) that must be installed before My webMethods includes the selection in the navigation pane.

Monitoring Selection: System-Wide

System-Wide Sub-items	Required webMethods components
Problems to locate problems with process instances and to view information related to the KPI rules that a process instance has violated. Additionally, use Problems to view problems where system components are out of compliance and to view information about the event rules and threshold rules that were violated.	Optimize for Process Optimize for Process For more information, see <i>webMethods Optimize User's Guide</i> .
Analytics Overview to view a summary of all system components. Use this task to view the performance of the entire system at a high level.	Optimize for Infrastructure Optimize for Process For more information, see <i>webMethods Optimize User's Guide</i> .

Monitoring Selection: Business

Business Sub-items	Required webMethods components
Collaboration Processes to search for and view currently running collaboration	Task Engine For more information, see <i>webMethods Task Engine User's Guide</i> .

Business Sub-items	Required webMethods components
processes that users start when creating a collaboration task.	
Process Analytics to analyze information about the performance of processes.	Optimize for Process For more information, see <i>webMethods Optimize User's Guide</i> .
Business Overview to monitor and analyze Trading Networks transaction data.	Optimize for B2B For more information, see <i>webMethods Optimize for B2B User's Guide</i> .
Process Instances to view details about individual process instances, including drilling down to view information about steps within a process. You can also use this link to suspend and resume processes.	Monitor Optimize for Process For more information, see the <i>webMethods Monitor User's Guide</i> or <i>webMethods Optimize User's Guide</i> .
<p>Tasks to view and manage tasks in My webMethods. Within this selection, you can navigate to:</p> <ul style="list-style-type: none"> ■ My Inbox to view tasks assigned to you. ■ Task List Management to monitor and manage running tasks. Use the task list to suspend, resume, assign, delegate, and resubmit tasks, among other activities. ■ Task Charts to view basic task charts. ■ [Task Type] to view a custom inbox showing all of the tasks of this type that are assigned to you (there is a separate [Task Type] selection for each type of task assigned to you). 	Trading Networks My webMethods Server For more information, see <i>webMethods Task Engine User's Guide</i> .
Six Sigma Summary to view six sigma information for process instances.	Optimize for Process For more information, see <i>webMethods Optimize User's Guide</i> .

Monitoring Selection: Integration

Integration Sub-items	Required webMethods components
<p>B2B to monitor Trading Networks transactions and other data related to exchanging data with trading partners. Also to set Trading Networks-specific My webMethods preferences.</p> <ul style="list-style-type: none"> ■ Transactions to track and manage documents that Trading Networks has processed. ■ Tasks to view the status and details of delivery and service execution tasks that Trading Networks creates when processing documents. ■ Activity Log to view log entries for activities occurring within the Trading Networks system. ■ User Preferences to set Trading Networks-specific user preferences. 	<p>Trading Networks</p> <p>For more information, see <i>webMethods Trading Networks User's Guide</i>.</p>
<p>Services to view log data that an Integration Server has logged for a service and to resubmit services.</p>	<p>Monitor</p> <p>For more information, see <i>webMethods Monitor User's Guide</i>.</p>
<p>Documents to view and resubmit documents that have been logged to the logging database.</p>	<p>Monitor</p> <p>For more information, see <i>webMethods Monitor User's Guide</i>.</p>

Administration Section of the Navigate Tab

The following tables list all possible selections in the **Administration** section of the **Navigate** tab along with the webMethods component(s) that must be installed before My webMethods includes the selections in the navigation pane.

Administration Selection: Messaging

Messaging Sub-items	Required webMethods components
Broker Servers to manage and monitor webMethods Broker Servers, webMethods Brokers, document types, client groups, and clients.	webMethods Broker For more information, see <i>Administering webMethods Broker</i> .
Broker Territories to create and manage territory webMethods Brokers and territory gateways.	
Broker Clusters to create and manage cluster webMethods Brokers and cluster gateways.	
Naming Directories to create and configure administered objects used by JMS.	
Settings to configure parameters relating to the operation of the webMethods Broker user interface on My webMethods	
Log to view error and activity messages generated by the webMethods Broker user interface.	

Administration Selection: System-Wide

System-Wide Sub-items	Required webMethods components
webMethods Content Configurator to view the available webMethods Content Service Platform servers, and to create and manage content listeners and filters for those servers.	webMethods Content Service Platform For more information, see <i>Implementing webMethods Content Service Platform for BPM</i> .
Permissions Management to manage access privileges and functional privileges that you assign to users, groups, and/or roles.	My webMethods Server For more information, see <i>Administering My webMethods Server</i> .

System-Wide Sub-items	Required webMethods components
<p>User Management to manage users, groups, and roles. Within this selection, you can navigate to:</p> <ul style="list-style-type: none"> ■ Roles to add, edit, and delete roles. ■ Groups to add, edit, and delete groups. ■ User to add, edit, and delete users. ■ Certificates to manage authentication certificates. 	<p>My webMethods Server</p> <p>For more information, see <i>Administering My webMethods Server</i>.</p>
<p>Calendars Management to configure and manage calendars. Within this selection you can navigate to:</p> <ul style="list-style-type: none"> ■ Business Calendars to add, edit, and delete business calendars. ■ User Calendars to add, edit, and delete user calendars. 	<p>Task Engine</p> <p>For more information, see <i>webMethods Task Engine User's Guide</i>.</p>
<p>Workspace Management to manage and manipulate all workspaces within My webMethods.</p>	<p>My webMethods Server</p> <p>For more information, see <i>Administering My webMethods Server</i>.</p>
<p>Environments to configure environments for Optimize for Process and Optimize for Infrastructure. Within this selection, you can navigate to:</p> <ul style="list-style-type: none"> ■ Database Pool Configuration to maintain a common list of database pools for webMethods servers in an environment. ■ Define Environments to define environments and common configurations for Optimize for Process and Optimize for Infrastructure components. 	<p>webMethods Broker</p> <p>Optimize for Infrastructure</p> <p>Optimize for Process</p> <p>My webMethods Server</p> <p>For more information, see <i>Configuring BAM</i>.</p>
<p>System Information to:</p> <ul style="list-style-type: none"> ■ Set up logging, and view information about the Analytic Engines, Web Service Data Collectors, and Prediction Engine. 	<p>Optimize for Infrastructure</p> <p>Optimize for Process</p>

System-Wide Sub-items	Required webMethods components
<ul style="list-style-type: none"> View information for common configuration environments. You can view the operational status and component ID, host and port information for a components in your webMethods environments. 	<p>For more information, see <i>Administering webMethods Optimize</i> and <i>Configuring BAM</i>.</p>
<p>B2B Permissions to manage permissions that control access to Trading Networks data and actions. Within this selection, you can navigate to:</p> <ul style="list-style-type: none"> Data Permissions to identify data sets and indicate the actions roles can take against Trading Networks data in the data sets. General Functional Permissions to indicate the Trading Networks actions that roles can perform. These permissions govern Trading Networks data not covered by data permissions. 	<p>Trading Networks</p> <p>For more information, see <i>webMethods Trading Networks Administrator's Guide</i>.</p>

Administration Selection: Analytics

Analytics Sub-items	Required webMethods components
<p>Rules to manage KPI, event, and threshold rules. Within this selection, you can navigate to:</p> <ul style="list-style-type: none"> Rule List to create rules to notify you when a process or resource becomes problematic and requires user attention. Rule Filters to edit data collection filters. Rule Audit to view complete auditing details for every rule-related change in your system. 	<p>Optimize for Infrastructure</p> <p>Optimize for Process</p> <p>For more information, see <i>webMethods Optimize User's Guide</i>.</p>
<p>KPIs to configure Key Performance Indicators (KPIs). Within this selection, you can navigate to:</p> <ul style="list-style-type: none"> Business Data to configure KPIs for business data. 	<p>Optimize for Infrastructure</p> <p>Optimize for Process</p> <p>For more information, see <i>Administering webMethods Optimize</i>.</p>

Analytics Sub-items	Required webMethods components
<ul style="list-style-type: none"> ■ System Data to configure KPIs for system data. ■ Dimensions to define dimensions. ■ KPI Hierarchies to view a graphical hierarchy of your system components to help you understand the hierarchy and interdependency of these components. ■ Intelligent Links to configure dynamic links to Web pages inside or outside of My webMethods and display those links on appropriate pages. 	
<p>Data Management to extract Optimize assets and purge data from the Optimize Analysis and Process Tracker database components. Within this selection, you can navigate to:</p> <ul style="list-style-type: none"> ■ Asset Extraction to extract various Optimize assets (such as dimensions and event maps), save them to your file system, and later deploy them to another Optimize Analytic Engine. ■ Live Purge to purge data from the Optimize Analysis and Process Tracker database components. 	<p>Optimize for Infrastructure Optimize for Process For more information, see <i>Administering webMethods Optimize</i>.</p>
<p>Infrastructure Components to configure components of the system, such as Integration Servers, that are automatically monitored.</p>	<p>Optimize for Infrastructure Optimize for Process For more information, see <i>Administering webMethods Optimize</i>.</p>
<p>Prediction to create prediction templates.</p>	<p>Optimize for Process For more information, see <i>webMethods Optimize User's Guide</i>.</p>
<p>Diagnostics to view information to troubleshoot issues with event maps, dimensions, hierarchies, KPIs, and rules.</p>	<p>Optimize for Infrastructure Optimize for Process For more information, see <i>webMethods Optimize User's Guide</i>.</p>

Analytics Sub-items	Required webMethods components
<p>Job Management to view activities of the Job Manager, which coordinates system activities.</p> <ul style="list-style-type: none"> ■ Job Audit to view summary information about all jobs scheduled with the Job Manager. ■ Job Queue to view the status of all jobs scheduled with the Job Manager. 	<p>Optimize for Infrastructure Optimize for Process</p> <p>For more information, see <i>Administering webMethods Optimize</i>.</p>

Administration Selection: Business

Business Sub-items	Required webMethods components
<p>webMethods Business Rules to dynamically update business rules created with the Rules Development feature in Software AG Designer.</p>	<p>webMethods Rules Development</p> <p>For more information, see <i>webMethods BPM Rules Development Help</i>.</p>
<p>Business Processes to access and modify detailed process model information, and to identify the process models that you want to monitor using Monitor and Optimize for Process.</p>	<p>Monitor</p> <p>Optimize for Process</p> <p>For more information, see <i>webMethods Monitor User's Guide</i> or <i>Administering webMethods Optimize</i>.</p>
<p>Business Processes Dashboard to quickly access and modify key information about a process model. For example, is it enabled, how many instances exist, or how many are running and failed? Click a process link to open an editable dialog box with key process model attributes. Hover the cursor over the process name to view a pop-up process diagram.</p>	<p>Monitor</p> <p>For more information, see <i>webMethods Monitor User's Guide</i>.</p>
<p>Data Management to archive and delete logging data from the Process Audit database and to view archive history.</p>	<p>Monitor</p> <p>For more information, see <i>webMethods Monitor User's Guide</i>.</p>

Business Sub-items	Required webMethods components
<p>Tasks to administer tasks that have been published to My webMethods Server. From here you can:</p> <ul style="list-style-type: none"> ■ Enable disable, delete, and start tasks. ■ Configure collaboration tasks. ■ Configure a task analytics connection. ■ Configure a task e-mail listener connection. 	<p>Task Engine</p> <p>For more information, see <i>webMethods Task Engine User's Guide</i>.</p>

Administration Selection: Integration

Integration Sub-items	Required webMethods components
<p>B2B to manage Trading Networks partner management, manage the archival and deletion of Trading Networks data, and configure Business Activity Monitoring for Trading Networks data.</p> <ul style="list-style-type: none"> ■ Archive Schedules to configure and schedule the archival and deletion of Trading Networks data. ■ Partner Profiles to add, edit, and delete Trading Networks profiles and extended profile fields. ■ Partner Groups to add, edit, and delete Trading Networks partner groups. ■ Partner Certificates to query for partner certificates that are expired or expiring soon. ■ Public Queues to add, edit, and delete Trading Networks public queues. ■ Business Monitoring to configure TN document types for BAM (Business Activity Monitoring) and globally enable all the TN document types for monitoring. 	<p>Trading Networks</p> <p>Optimize for B2B</p> <p>For more information, see <i>webMethods Trading Networks Administrator's Guide</i> and <i>webMethods Optimize for B2B User's Guide</i>.</p>

Integration Sub-items	Required webMethods components
<p>B2B Settings to set configuration settings for Trading Networks, Module for EDI, and Module for EDIINT.</p> <ul style="list-style-type: none"> ■ Administrative Preferences to set administrative settings, including identifying the Trading Networks server that My webMethods Server is to interact with. ■ Configure Properties to set the configuration properties of Trading Networks, Module for EDI, and Module for EDIINT. ■ Submit Documents to submit XML or EDI documents to Trading Networks. ■ Control Numbers to search, create, and manage control numbers in Module for EDI. 	<p>Trading Networks</p> <p>Module for EDI</p> <p>Module for EDIINT</p> <p>For more information, see <i>webMethods Trading Networks Administrator's Guide</i>, <i>webMethods Module for EDI Installation and User's Guide</i>, and <i>webMethods Module for EDIINT Installation and User's Guide</i></p>
<p>ESB to access Integration Server Administrator so that you can administer Integration Servers.</p>	<p>Integration Server</p> <p>For more information, see <i>webMethods Integration Server Administrator's Guide</i>.</p>

Administration Selection: My webMethods

My webMethods Sub-items	Required webMethods components
<p>System Settings to change the host names and port numbers that My webMethods uses to communicate with the Integration Server, the Analytic Engine, and the Task Engine.</p>	<p>Monitor</p> <p>Optimize for Infrastructure</p> <p>Optimize for Process</p> <p>Task Engine</p> <p>For more information, see <i>webMethods Monitor User's Guide</i>, <i>Administering webMethods Optimize</i>, and <i>webMethods Task Engine User's Guide</i>.</p>

My webMethods Sub-items	Required webMethods components
Directory Services to configure external directory services you want to use with My webMethods.	My webMethods Server For more information, see <i>Administering My webMethods Server</i> .
E-mail Servers to configure the mail server settings used by My webMethods Server when processing e-mail messages.	My webMethods Server For more information, see <i>Administering My webMethods Server</i> .
Cluster Settings to define the URL to use to access My webMethods in a clustered environment and to configure different roles of My webMethods Server clustered nodes.	My webMethods Server For more information, see <i>Administering My webMethods Server</i> .
Data Sources to connect to external data sources, such as databases, and make them available to My webMethods Server.	My webMethods Server For more information, see <i>Administering My webMethods Server</i> .

Workspace Selections in the Navigate Tab

The **Workspaces** section of the **Navigate** tab provides access to workspaces. It has two sections:

- **Recently Added** that lists workspaces that you have recently added and saved.
- **My Workspaces** that lists workspaces that you have added to your navigation. These can be either workspaces that you have created or workspaces that another user has created and shared with you. For more information, see "[About Adding Workspaces to the Navigation Pane](#)" on page 62.

Tool Selections in the Tools Tab

The selections listed in the **Tools** tab might differ based on the permissions you are assigned.

To use a tool, you drag it onto a workspace. In response, My webMethods adds a portlet window to the workspace for the tool. For more information about using tools in workspaces, see "[Using Tools to Enhance Workspaces](#)" on page 75 and *Diagnosing My webMethods Server*.

Layout Section of the Tools Tab

The tools for layout management that My webMethods provides as installed are in the **Layout** section of the tab.

Here is a brief description of the available tool:

Tool	Use to...
Row	Add rows to a workspace. For more information, see <i>Administering My webMethods Server</i> .

MWS Monitoring and Diagnostics Section of the Tools Tab

The tools for monitoring and diagnosing that My webMethods provides as installed are in the **MWS Monitoring and Diagnostics** section of the tab.

The following tables provide a brief description of each of the tools:

MWS Monitoring and Diagnostics Section: Log Tracing and Analysis

Log Tracing and Analysis Sub-item	Required webMethods components
Log Analysis Datasource to read and analyze log files created within My webMethods Server.	My webMethods Server For more information, see <i>Diagnosing My webMethods Server</i> .
Log Analysis Time Period to configure a time period for creating log files within My webMethods Server.	My webMethods Server For more information, see <i>Diagnosing My webMethods Server</i> .
Log Configuration to set the log message collection criteria.	My webMethods Server For more information, see <i>Diagnosing My webMethods Server</i> .
Log Errors by Severity to analyze and display logs of WARNING, ERROR, or FATAL severity.	My webMethods Server For more information, see <i>Diagnosing My webMethods Server</i> .
Log FATAL Issues to analyze and display logs only of FATAL severity.	My webMethods Server

Log Tracing and Analysis Sub-item	Required webMethods components
	For more information, see <i>Diagnosing My webMethods Server</i> .
Log Issues to analyze and display logs of WARNING, ERROR, or FATAL severity.	My webMethods Server For more information, see <i>Diagnosing My webMethods Server</i> .
Log Issues by Component to analyze and display logs by the component in which they appear.	My webMethods Server For more information, see <i>Diagnosing My webMethods Server</i> .
Log Issues by Product to analyze and display logs by the product in which they appear.	My webMethods Server For more information, see <i>Diagnosing My webMethods Server</i> .
Log Viewer to view the latest messages in plain text log files of My webMethods Server.	My webMethods Server For more information, see <i>Diagnosing My webMethods Server</i> .
Most Used Portlets to display statistics about the ten most used portlets in My webMethods Server.	My webMethods Server For more information, see <i>Diagnosing My webMethods Server</i> .
Most Used Web Services to display statistics about the ten most used Web services in My webMethods Server.	My webMethods Server For more information, see <i>Diagnosing My webMethods Server</i> .
SOAP Traffic Monitor to debug issues with web service calls from other portlets.	My webMethods Server For more information, see <i>My webMethods Server Portlet Reference</i> .

MWS Monitoring and Diagnostics Section: Performance Information

Performance Information Sub-item	Required webMethods components
Performance Analysis to measure and analyze the performance of My	My webMethods Server For more information, see <i>Diagnosing My webMethods Server</i> .

Performance Information Sub-item	Required webMethods components
webMethods Server services and custom portlets or applications.	
Performance Statistics to display statistic and analysis information about the performance of various My webMethods Server actions which are grouped by categories.	My webMethods Server For more information, see <i>Diagnosing My webMethods Server</i> .
Slow Database Calls to display information about ten of the slowest database calls in My webMethods Server.	My webMethods Server For more information, see <i>Diagnosing My webMethods Server</i> .
Slow Portlets to display performance information about ten of the slowest portlets in My webMethods Server.	My webMethods Server For more information, see <i>Diagnosing My webMethods Server</i> .
Slow Web Services to display performance information about ten of the slowest Web services in My webMethods Server.	My webMethods Server For more information, see <i>Diagnosing My webMethods Server</i> .

MWS Monitoring and Diagnostics Section: System Information

System Information Sub-item	Required webMethods components
Memory Monitor to monitor the memory usage of the Java Virtual Machine (JVM) and send notifications to administrators when configured threshold limits are reached.	My webMethods Server For more information, see <i>My webMethods Server Portlet Reference</i> .
Overview to view server information on the following tabs: <ul style="list-style-type: none"> ■ System Properties ■ Request Properties ■ Session Attributes ■ Application Attributes 	My webMethods Server

System Information Sub-item	Required webMethods components
Thread Dump to monitor thread execution deadlocks in My webMethods Server threads.	My webMethods Server For more information, see <i>Diagnosing My webMethods Server</i> .
Workspace Context Viewer to view, add, modify, and delete context information about the currently displayed workspace page.	My webMethods Server

Workspace Tools Section of the Tools Tab

The tools for workspace management that My webMethods provides as installed are in the **Workspace Tools** section of the tab.

The following table provides a brief description of each of the tools:

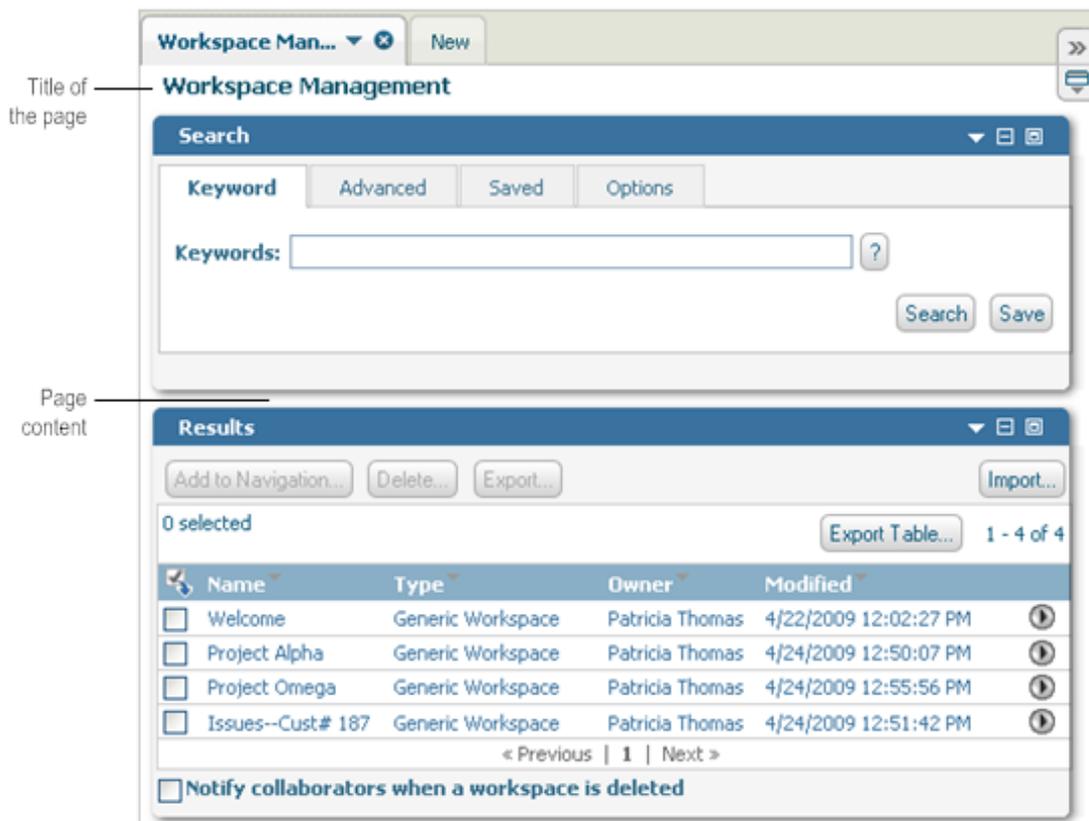
Tool	Use to...
Attachments	Attach files to a workspace. For more information, see "Attachments Tool" on page 79 .
Bookmarks	Add a list of links to external web sites and links to other workspaces. For more information, see "Bookmarks Tool" on page 82 .
Directory Browser	Add a search window to a workspace that allows you to find identification information about other My webMethods users. For more information, see "Directory Browser Tool" on page 84 .
HTML Text	Add formatted text to a workspace. For more information, see "HTML Text Tool" on page 85 .
Image	Add an image to a workspace. For more information, see "Image Tool" on page 86 .
Note	Add a simple note to a workspace. For more information, see "Note Tool" on page 88 .

Tool	Use to...
User Calendar	Add a user's calendar to a workspace so that you can view the user's availability. For more information, see " User Calendar Tool " on page 90.

Note: You might have additional tools that a My webMethods developers has added. Check with your system administrator or developer for information about site-specific tools.

Format of Application Pages

The following shows the format of a typical application page.



Title of the page

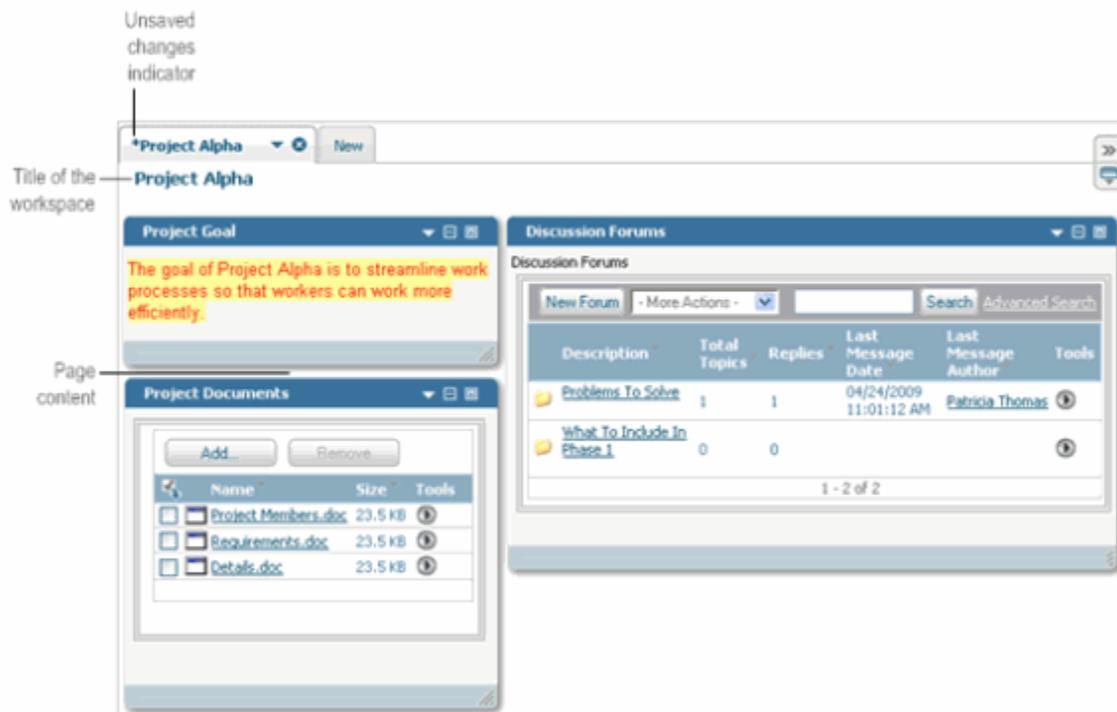
My webMethods displays the title of the application page at the top.

If you have navigated to a subpage within a selection from the navigation pane, My webMethods displays the title of the selection from the navigation pane along with the title of the current page, using the format *Main Page > Subpage*.

- Page content
- The format of the page content is determined by the webMethods component that displays the page. Many pages uses similar panels for searching for:
- Users/groups/roles, for more information see "[Searching for Users, Groups, and Roles](#)" on page 93.
 - Data, for more information see "[Searching for Data](#)" on page 99

Format of Workspace Pages

The following shows the format of a workspace.



- Unsaved changes indicator
- If you have unsaved changes in a workspace, My webMethods displays an asterisk (*) before the workspace name on the tab.
- Title of the workspace
- My webMethods displays the name of the workspace at the top.
- Page content
- The owner of the workspace and contributors to the workspace determine the content of the workspace. You can add windows from application pages, windows from other workspaces, and add tools to the workspace. For more information, see "[Working with](#)

[My webMethods Workspaces](#) on page 51 and [Working with Workspace Content](#) on page 65.

3 Viewing and Updating Your My webMethods Profile

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The My webMethods Profile

The system maintains a profile for each user of My webMethods. You access your profile via the **My Profile** standard link. The following table lists the settings you can update from your profile:

Setting	For more information, see...
My webMethods password	"Changing Your Password" on page 13
Identity and locale	"Identifying Yourself to My webMethods " on page 42
Page to display at login	"Setting Your User Preferences" on page 45
Number of search results to display	"Defining the Number of Search Results Rows to Display Per Page" on page 110
Whether to display confirmation messages before completing actions, such as before deleting a workspace	"Setting Your User Preferences" on page 45
Business and user calendar	"Calendars" on page 48

Identifying Yourself to My webMethods

Your identification information is listed on the **User Information** and **User Profile** tabs of your profile.

- **User Information tab.** Your name and e-mail address are on the **User Information** tab.

Note: You can only update the fields on the **User Information** tab if your user account is defined in My webMethods; that is, the "System" directory service. If your user account is defined in an external directory management system, for example LDAP, My webMethods obtains values from the external directory management system for these fields.

- **User Profile tab.** Several fields that provide optional information that you can supply about your identity.

To identify yourself to My webMethods

1. Click the **My Profile** link, which is located at the top of all My webMethods pages.
2. Click the **User Information** tab.
 - a. Use the **First Name** and **Last Name** fields to specify your name.
 - b. Optionally, type your e-mail address in the **E-mail Address** field.

Note: My webMethods will not be able to send you notifications if you do not specify an e-mail address. For example, if you subscribe to a forum, My webMethods cannot send you notifications of updates if you do not specify an e-mail address.

3. Click the **User Profile** tab.
4. Specify the following optional information:

In this field...	Specify...
Middle Name	Your middle name.
Title	Your title, for example, Mr., Mrs., or Ms. If the title you want to use does not appear in the list, select Other . My webMethods prompts you for the title you want to use.
Name Suffix	The suffix that should appear after your name, if any, for example, Jr., Sr., PhD, III. If the suffix you want to use does not appear in the list, select Other . My webMethods prompts you for the suffix you want to use.
Preferred Language/Locale	Your language and locale. The Default selection indicates you want to use the language installed on My webMethods Server.
Country/Region ID	The country where you are located.
Address 1	Your street address.
Address 2	
City	The city where you are located.
State/Province	The state or province where you are located.

<u>In this field...</u>	<u>Specify...</u>
Postal Code	Your postal code, for example, a ZIP Code if you are located in the United States.
Country/Region ID	The country where you are located.
Phone 1 Area Code	Your area code.
Phone 1 Number	Your phone number.
Phone 1 Extension	Your extension, if any.
Phone 1 Country Code	The country code associated with your phone number.
Default Date Format	The date format you want My webMethods to use when displaying dates. For more information about date formats, see the Javadoc for SimpleDateFormat.
Default Time Format	The time format you want My webMethods to use when displaying times. For more information about time formats, see the Javadoc for SimpleDateFormat.
Default Time Zone	The time zone that My webMethods uses when displaying times.
Default Number Format	The format that My webMethods uses when displaying numbers. For more information about number formats, see the Javadoc for DecimalFormat.
Default Currency Format	The format that My webMethods uses when displaying currency. For more information about currency formats, see the Javadoc for DecimalFormat.

Note: Not all portlets make use of the defaults that you specify in **Default Date Format**, **Default Time Format**, **Default Time Zone**, **Default Number Format**, and **Default Currency Format**.

5. Click **Save**.

6. If you are done updating your profile, close the **My Profile** tab. For instructions, see "[Closing Tabs](#)" on page 20.

Setting Your User Preferences

The **User Preferences** tab contains miscellaneous My webMethods preferences that you can set for your interaction with My webMethods. This section describes how to set the preferences that My webMethods provides as installed. For more information about these preferences, see "[My webMethods User Preferences](#)" on page 46. The My webMethods administrator can remove preferences and/or add additional preferences. As a result, your preferences might be different.

To set your user preferences

1. Click the **My Profile** link, which is located at the top of all My webMethods pages.
2. Click the **User Preferences** tab.
3. To identify the application page, workspace, or tab that you want My webMethods to display when you log into My webMethods, do one of the following:
 - To identify an application page that you want My webMethods to display:
 - i. In the **Start Page** field, click **Application Page**.
 - ii. Navigate to the page you want displayed by clicking the links in the **Name** column.
 - iii. When the page you want displayed is in the list, select it.
 - iv. Click **Apply**.
 - v. Click **Save**.
 - To identify a workspace that you want My webMethods to display:
 - i. In the **Start Page** field, click **Workspace**.
 - ii. Use the search fields to search for the workspace that you want displayed and click **Search**.
 - iii. In the results, select the workspace that you want displayed.
 - iv. Click **OK**.
 - v. Click **Save**.
 - To indicate that you want My webMethods to display the last active tab from your last session at login:
 - i. In the **Start Page** field, click **Clear**.
 - ii. Select the **Open Last Active Tab on Login** check box.
 - iii. Click **Save**.

4. To indicate whether you want My webMethods to prompt you to confirm actions, perform the following steps:
 - a. If you want My webMethods to prompt you to confirm the deletion of a workspace, select the **Show Delete Workspace Confirmation** check box. If you want My webMethods to immediately delete a workspace with no confirmation, clear the check box.
 - b. If you want My webMethods to prompt you to confirm the deletion of a window from a workspace, select the **Show Delete Window Confirmation** check box. If you want My webMethods to immediately delete a window with no confirmation, clear the check box.
 - c. If you want My webMethods to prompt you to confirm a request to close all tabs except the current one, select the **Close All Tabs Confirmation** check box. If you want My webMethods to immediately close tabs with no confirmation, clear the check box.
 - d. Click **Save**.
5. To identify the default number of rows that you want My webMethods to display in windows that list items in rows, for example, in search results, select one of the following in the **Items Per Page** field and click **Save**.
 - **Default** to allow My webMethods to determine the number of items to display per page.
 - A number to indicate the number of items you want My webMethods to display per page.
 - **Show All** to have My webMethods display all items on a single page.
6. If you want My webMethods to automatically save changes to a workspace when you select to view another workspace or application page, select the **Auto-Save when Navigating to a Different Workspace** check box. If you want My webMethods to prompt you to save changes before displaying another workspace or application page, clear the check box.
7. If you want My webMethods to perform full-page refreshes rather than asynchronous refreshes, select the **Bypass Full Page Refreshes When Possible** check box.
8. If you are done updating your profile, close the **My Profile** tab. For instructions, see "[Closing Tabs](#)" on page 20.

My webMethods User Preferences

The following table lists the preferences that My webMethods provides as installed. For instructions for how to set these preferences, see "[Setting Your User Preferences](#)" on page 45.

Preference	Description
Start Page	Indicates the application page or workspace that you want My webMethods to display when you initially log into My webMethods. This setting overrides the Open Last Active Tab on Login preference.

Preference	Description
	<ul style="list-style-type: none"> <li data-bbox="618 323 1354 457">■ If Start Page is set, at login My webMethods displays the page identified by the Start Page preference. This preference takes precedence over the Open Last Active Tab on Login preference. <li data-bbox="618 478 1354 583">■ If Start Page is not set, but Open Last Active Tab on Login is set, at login My webMethods displays the last active tab from your last session. <li data-bbox="618 604 1354 709">■ If neither the Start Page nor Open Last Active Tab on Login are set, at login My webMethods displays a blank workspace in a new tab.
Open Last Active Tab on Login	Identifies whether you want My webMethods to display the last active tab from your last session at login. The Start Page preference overrides this preference. For more information about how the two preferences work together, see the description of the Start Page preference above.
Items Per Page	Indicates the default number of rows that My webMethods displays, for example, in search results.
Show Delete Workspace Confirmation	When you delete a workspace, this preference indicates whether you want My webMethods to prompt you to confirm the action. When this check box is cleared and you delete a workspace, My webMethods immediately deletes the workspace without asking for confirmation.
Show Delete Window Confirmation	When you delete a window from a workspace, this preference indicates whether you want My webMethods to prompt you to confirm the action. When this check box is cleared and you delete a window from a workspace, My webMethods immediately deletes the window without asking for confirmation.
Show Close All Tabs Confirmation	When you request that My webMethods close all tabs except the current one, this preference indicates whether you want My webMethods to prompt you to confirm the action. When this check box is cleared and you request to close all tabs, My webMethods immediately closes the tabs without asking for confirmation.

Preference	Description
Auto-Save when Navigating to a Different Workspace	When you are viewing a workspace that has changes that have not yet been saved and click a tab to view another workspace or application page, the preference indicates whether you want My webMethods to automatically save the changes to the current workspace before displaying the selected workspace or application page. When this check box is cleared, My webMethods prompts you to ask if you want the changes saved before displaying the selected workspace or application page.
Bypass Full Page Refreshes when possible	When you make a change to a page and apply the changes, My webMethods asynchronously refreshes only the portion of the page that you have modified. When this check box is cleared, My webMethods refreshes the full page.

Calendars

The My webMethods profile contains calendar information that the Task Engine uses to assist with task definition and behavior.

The two types of calendars are business calendars and user calendars.

- **Business calendars** define standard business days and hours for your organization, including holidays, weekends, and other times when your organization is *not* conducting business. An administrator configures the business calendars. For example, an administrator might configure a business calendar for normal business hours of Monday through Friday, 8:00 A.M. to 5:00 P.M. Eastern Standard time.

An administrator can configure multiple business calendars. For example, if your organization has different shifts, an administrator can configure a business calendar for each shift. Another reason for multiple business calendars might be if your organization spans multiple time zones; an administrator can configure a business calendar for each time zone.

If an administrator has configured business calendars, in your My webMethods profile, you can select the business calendar that best fits your working hours so that the Task Engine can determine your business hours and schedule tasks accordingly. For instructions, see "[Defining Your Business Calendar](#)" on page 49.

- **User calendars** are calendars that a third-party application maintains, for example, a Microsoft Outlook calendar or Lotus Notes calendar. An administrator must configure the My webMethods Server so that it can access the user calendars. You maintain your calendar in the third-party application to define your availability. As a result, the Task Engine can determine your individual availability when

scheduling tasks. Also, you can view a read-only version of your calendar within My webMethods. For instructions, see ["Viewing Your Personal User Calendar" on page 49.1](#)

Note: If an administrator configures the use of user calendars, you can also use the User Calendar tool in a workspace to display your availability or the availability of another My webMethods user by adding a user calendar to a workspace. For more information, see ["User Calendar Tool" on page 90](#).

Defining Your Business Calendar

On the **Calendar** tab of your profile, you can define the business calendar to use for your user account. By default, My webMethods uses the default calendar that the administrator creates.

Note: You can only select a business calendar for your user account if an administrator has previously configured business calendars.

To define your business calendar

1. Click the **My Profile** link, which is located at the top of all My webMethods pages.
2. Click the **Calendar** tab.
3. In the **User Business Calendar** panel, in the **Business Calendar** list, select the calendar to use for your user account.
4. Click **Save**.

Viewing Your Personal User Calendar

On the **Calendar** tab of your profile, you can view your user calendar, which shows your availability. The user calendar displays the calendar that you maintain in a third-party application, such as Microsoft Outlook or Lotus Notes.

Note: You can only view your personal user calendar if an administrator has previously configured My webMethods Server to access user calendars from a third-party application.

To view your user calendar

1. Click the **My Profile** link, which is located at the top of all My webMethods pages.
2. Click the **Calendar** tab.

My webMethods displays your user calendar in the **User Personal Calendar** panel. If an administrator has not configured My webMethods Server to access user calendars, My webMethods displays a message indicating that user calendars are not available.

4 Working with My webMethods Workspaces

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About Workspaces

A *workspace* is a page where you add the content that you want. You can add:

- **Tools** that My webMethods provides, for example, the Attachments tool that allows you to attach files to a workspace. For more information about tools that My webMethods provides, see "[Using Tools to Enhance Workspaces](#)" on page 75.
- **Custom tools** that a developer at your site has created and added to My webMethods.
- **Windows from application pages.** As you work with My webMethods, you navigate through the user interface to display information that you need or that you are interested in. My webMethods displays the information in the user interface using portlet windows. When you encounter information that is vital for you or that you frequently use, you can add it to a workspace. The windows that you add maintain their context when the system displays them in a workspace. For example, if you select to add a monitor that is displaying order cycle time to a workspace, when you view the workspace, the window will display the monitor specifically for order cycle.
- **Windows from other workspaces.** If you are viewing a workspace and want a copy of a window that is in one workspace in another workspace, you can copy it.

For more information about managing the content in a workspace, see "[Working with Workspace Content](#)" on page 65.

You can create as many workspaces as you need. You can share your workspaces with other users or use workspaces that other users have shared with you. When a workspace is shared, the owner sets the permissions that define the actions users can take against the workspace. For example, you might share one of your Workspaces and only allow users to view the content, but not modify it. For more information about sharing workspaces, see "[Workspace Sharing](#)" on page 58.

Use workspaces to group related information. Examples of uses for workspaces might be to:

- **Group information and tools** that you frequently use in one location. For example, you might be involved with several projects and want to create a separate workspace for each project.
- **Troubleshoot an issue.** You can add information related to the issue to a workspace. You might want to share the workspace with other users that are involved in the issue. You can add tools, such as the Discussion Topics tool, to facilitate discussions about the issue with other users.
- **Organize the work you need to do for tasks.** For example, in My webMethods you might display your task inbox and search for specific tasks. You can add the search results to a workspace. Then you can add additional tools or windows from application pages that you need to accomplish the tasks.

About Creating New Workspaces

When creating a new workspace, you can either create:

- An empty workspace
- A workspace that is a copy of an existing workspace

To copy an existing workspace, you use “save as” functionality to save an existing workspace using a new name. As you make changes to the new and original workspaces, My webMethods does not synchronize the changes. The two workspaces are distinct.

Creating New Empty Workspaces

To create new empty workspaces

1. Click the **New** tab, which My webMethods always displays as the last visible tab above the content area.

My webMethods displays an empty workspace with a default name. To change the name, see "[Renaming Workspaces](#)" on page 57.

2. Click ▾ **Menu** on the tab for the new workspace and select **Save Workspace**.

Using “Save As” to Create a New Workspace

To create a new workspace that is a copy of an existing workspace

1. Open the workspace that you want to use as the base for the new workspace. For instructions, see "[Opening Workspaces](#)" on page 55.
2. Click ▾ **Menu** on the tab for the workspace and select **Save As**.
3. In the Save Workspace As window in the **New Workspace Name** field, type the name you want to use for the new workspace.
4. Click **OK**.

Defining the Layout of a Workspace

To define how the windows within a workspace can be positioned, define the workspace layout. There are two types of layouts:

- **Column layout.** In this layout, all the windows in a workspace are aligned in columns. Windows cannot overlap within a column. You can define a workspace to have one, two, three, or four columns.

- **Free Form layout.** In this layout, you can place windows on the workspace in any location. Windows can overlap and even completely cover one another. This is the default for a new workspace.

For instructions for adding windows to a workspace, see:

- [" Adding Tools to a Workspace" on page 66](#)
- [" Adding Windows from Application Pages to a Workspace" on page 66](#)
- [" Adding Windows from a Workspace to Another Workspace" on page 68](#)

For instructions for how to position windows within a workspace, see [" Positioning Windows in a Workspace" on page 73](#)

Note: To define or update the layout for a workspace you must either be the owner of the workspace, or if you are using a workspace that another user has shared with you, you must have “View and Modify” or “Full Control” permissions to the workspace. If you have “View Only” permission to a workspace, you can change the layout; however, you cannot save the changes; as a result, when you leave the workspace, it will revert to its previous state. For more information about sharing workspaces, see ["Sharing Workspaces" on page 60](#).

To define the layout of a workspace

1. Click ▼ **Menu** on the tab for the workspace and select **Workspace Properties**.
2. Select the **Layout** tab.
3. From the **Columns** list, select layout that you want to use for the workspace.
4. If you select **One Column**, **Two Columns**, **Three Columns** or **Four Columns**, you can set additional properties for each column in the layout.
 - a. In the **Width** field type the percentage of the workspace to use for the column. By default the percentages are set for evenly spaced columns.
 - b. Select the **Word Wrap** check box if you want My webMethods attempt to wrap long text lines within windows in the workspace to fit the window size. Clear the check box if you do not want long lines to wrap.

Allowing long lines to wrap helps to better fit windows within columns.
 - c. From the **Horizontal Alignment** list select how the windows should be aligned horizontally in the column. By default, My webMethods left aligns the windows in each column.
 - d. From the **Vertical Alignment** list select how the windows should be aligned vertically in the column. By default, My webMethods aligns the windows at the top of each column.
5. Click **OK**.
6. Click ▼ **Menu** on the tab for the workspace and select **Save Workspace** to save your changes.

Opening Workspaces

You can open workspaces that you own and workspaces that other users own and have shared with you. For more information about shared workspaces, see "[Sharing Workspaces](#)" on page 60.

To open a workspace

1. In the navigation pane, click the **Navigate** tab.
2. In the **Workspaces** section of the Navigate tab, browse to and click the name of the workspace you want to open.

Note: If the workspace you want to open is not in the navigation pane, you can search for and add it to the navigation. For more information, see "[About Adding Workspaces to the Navigation Pane](#)" on page 62.

Workspace Properties

You can open the properties of a workspace to view or set them. The properties are grouped on the following tabs:

- **General** tab, which lists properties, such as the workspace name and description. For a list and description of each general property, see the table below.
- **Layout** tab, which you can use to define how windows can be positioned in a workspace. For more information, see "[Defining the Layout of a Workspace](#)" on page 53.

The following table describes the properties on the **General** tab.

Section	Property	Description
General	Name	The name of the workspace. For instructions for changing the workspace name, see " Setting General Properties for a Workspace " on page 56 and " Renaming Workspaces " on page 57.
	Description	A description for the workspace. Note: Currently the description is only listed in the properties and is not used by My webMethods for any specific purpose.

Section	Property	Description
		For instructions for changing the workspace description, see " Setting General Properties for a Workspace " on page 56.
	Keywords	Keywords that you assign to a workspace that you can later use when searching for a workspace. For instructions for defining keywords for a workspace, see " Setting General Properties for a Workspace " on page 56.
Maintenance	Owner	The user name of the user that owns the workspace.
	Created On	The date and time the workspace was created.
	Modified On	The date and time of the last time the workspace was updated.
	Aliases	This property is intended for expert users. A workspace can have zero, one, or more aliases. An alias defines an alternative way to access a workspace. Workspace developers might need to add aliases if they are building complex multi-page applications and need to refer to workspaces, for example, when creating navigation from one page to another and need to pass parameters to a specific workspace. For more information about aliases, see <i>Administering My webMethods Server</i> .

Setting General Properties for a Workspace

Use the following procedure to view and/or set the general properties for a workspace. For a description of the properties on the **General** tab, see "[Workspace Properties](#)" on page 55.

Note: For instructions for setting properties on the **Layout** tab, see "[Defining the Layout of a Workspace](#)" on page 53.

Note: To update workspace properties you must either be the owner of the workspace, or if you are using a workspace that another user has shared with you, you must

have “View and Modify” or “Full Control” permissions to the workspace. For more information about sharing workspaces, see ["Sharing Workspaces" on page 60](#).

To set the workspace properties

1. Click ▾ **Menu** on the tab for the workspace and select **Workspace Properties**.
2. Select the **General** tab.
3. To change the name of the workspace, type a new name in the **Name** field.
You can specify from 1 through 255 characters for the name. You can use any characters, including non-ASCIIs or special characters. The name must be unique among all your workspaces. If you attempt to assign a duplicate name, My webMethods appends a suffix to the name, for example, “(2)” to make it unique.
4. Optionally, in the **Description** field, type a description for the workspace.
You can specify from 1 through 255 characters for the description. You can use any characters, including non-ASCIIs or special characters.
5. Optionally, in the **Keywords** field, type one or more keywords to associate with the workspace. To specify more than one, separate the keywords with a comma.
You can use any characters, including non-ASCIIs or special characters when specifying keywords. There is no limit to the number of characters you can use in a keyword.
6. Click **OK**.
7. Click ▾ **Menu** on the tab for the workspace and select **Save Workspace** to save your changes.

For instructions for working with workspace aliases, see *Administering My webMethods Server*.

Renaming Workspaces

To rename a workspace you must either be the owner of the workspace, or if you are using a workspace that another user has shared with you, you must have “View and Modify” or “Full Control” permissions to the workspace. For more information about sharing workspaces, see ["Sharing Workspaces" on page 60](#).

To rename a workspace

1. Click ▾ **Menu** on the tab for the workspace and select **Rename Workspace**.
2. In the Rename Workspace window in the **New Workspace Name** field, type a name to assign to the workspace.
You can specify from 1 through 255 characters for the name. You can use any characters, including non-ASCIIs or special characters. The name must be unique among all your workspaces. If you attempt to assign a duplicate name, My webMethods appends a suffix to the name, for example, “(2)” to make it unique.

3. Click **OK** to close the Rename Workspace window.

Workspace Sharing

You can share workspaces with other users.

- If you have a workspace that contains information that other users might need to view, share the workspace with those users and grant them “View Only” permissions to the workspace.
- If you have a workspace that other users might want to view, but also can contribute information, share the workspace with those users and grant them “View and Modify” permissions.
- If you have a workspace and want to allow other users to have full control over the workspace, share the workspace and grant “Full Control” permissions.

You can share a workspace with individual users, groups of users, or roles. If you grant permission to a group or role, there might be individual users within that group or role that you do not want to have access to your workspace. In this case, you can explicitly deny a user access.

You can have My webMethods send notification to users when you share or stop sharing workspaces with them by simply selecting an option when performing the procedure to share or unshare a workspace. My webMethods does *not* send notification when you change a permission for an existing user/group/role, only when a user/group/role is added or removed. For the notification My webMethods sends an e-mail message.

- For a user, My webMethods obtains the e-mail address to use from the user’s My webMethods profile.
- For a group, My webMethods obtains the e-mail addresses for each user in the group from each user’s My webMethods profile.
- For a role, if the role has an “email” attribute that specifies an e-mail address for the role, My webMethods sends the notification to that e-mail address. Otherwise, My webMethods obtains the e-mail addresses for each member of the role from each user’s My webMethods profile.

Note: If an e-mail address is not available, no notification is sent, for example, if a user has not provided an e-mail address in their profile. Also note that if the “email” attribute is not available for a role, My webMethods only sends notifications to role members if the role is a Static role; it does not support sending notification to LDAP Query, Database, or Rule-based roles.

For instructions for sharing a workspace, see ["Sharing Workspaces" on page 60](#). For descriptions of the permissions you can assign, see ["Workspace Sharing Permissions" on page 59](#).

If you grant users “View and Modify” and/or “Full Control” permissions, more than one user can be working in and updating a workspace at the same time. In this case, if two or

more users make changes to the same window in a workspace, the changes made by the user who saves last will be the changes that are maintained.

Workspace Sharing Permissions

The following table describes the workspace permissions you can assign to a user when sharing a workspace.

Permission	Use to...
No Permissions	<p>Explicitly deny a user, group, and/or role permission to take any action against a workspace, including viewing the workspace.</p> <p>You might use this permission if you grant access to a group or role, but want to explicitly deny access to one or more users that are in the group or role.</p> <p>Note: The owner of the workspace and all users in the Admin role, for example, sysadmin, always have Full Control permissions to a workspace regardless of the actual permission settings.</p>
View Only	<p>Grant users the ability to view a workspace. Users cannot change the content of the workspace in any way.</p> <p>Note: When you set the permissions for the workspace, the same setting is assigned to all the windows within the workspace. As a result, if you use the “View Only” permission, all windows in the workspace are also set to “View Only”, overriding any custom permissions that have been set for windows within the workspace. If you want to have a “View Only” workspace, but allow users to modify selected windows in the workspace, first set the workspace permission to “View Only”; then assign custom permissions for the selected windows in a workspace.</p>
View and Modify	<p>Grant users the ability to view and modify the contents of the workspace. Specifically, when you grant users this permission users can:</p> <ul style="list-style-type: none"> ■ View the content of the workspace ■ Update the layout of a workspace ■ Update the workspace properties ■ Rename the workspace ■ Add content to the workspace ■ Update the properties of windows in the workspace

Permission	Use to...
	<ul style="list-style-type: none"> ■ Rename windows in the workspace ■ Resize windows in the workspace ■ Reposition windows in the workspace ■ Delete windows from the workspace
Full Control	<p>Grant users full control over the workspace. In addition to all the tasks a user can perform when granted "View and Modify" permissions, the user can also take the following actions against the workspace:</p> <ul style="list-style-type: none"> ■ Share the workspace with other users ■ Delete the workspace

Sharing Workspaces

Use the following procedure to share a workspace with other users, groups, or roles.

Note: To share a workspace with another user, you must either be the owner of the workspace, or if you are using a workspace that another user has shared with you, you must have "Full Control" permissions for the workspace.

To share a workspace

1. Click **▼ Menu** on the tab for the workspace and select **Share Workspace**.
2. In the Workspace Sharing window click **Add**.
3. Use the Select Principal(s) window to search for and select the users, groups, and roles with whom you want to share the workspace. When you are done, click **Apply** to close the Select Principal(s) window. For more information about using the Select Principal(s) window, see ["Searching for Users, Groups, and Roles" on page 93](#).

For each selected user, group, and/or role, My webMethods adds a row to the Workspace Sharing window

4. For each user, group, and/or role that you selected, select the permissions you want to assign that user, group, or role from the list in the **Permissions** column. For more information about the permissions you can assign, see ["Workspace Sharing Permissions" on page 59](#).
5. If you want to notify the users affected by this change, select the **Notify collaborators when the workspace is shared or unshared** check box.
6. Click **Apply**.

Unsharing Workspaces

Use the following procedure when you no longer want to share a workspace with a user, group, or role.

Note: To stop sharing a workspace with another user, you must either be the owner of the workspace, or if you are using a workspace that another user has shared with you, you must have “Full Control” permissions for the workspace.

To stop sharing a workspace

1. Click  **Menu** on the tab for the workspace and select **Share Workspace**.
2. In the Workspace Sharing window, select the check box for the users, groups, and/or roles with which you no longer want to share access to the workspace.
3. If you want to notify the users affected by this change, select the **Notify collaborators when the workspace is shared or unshared** check box.
4. Click **Delete**.
5. Click **Apply**.

Closing Workspaces

If you no longer need a workspace open, you can close it. When you need to use the workspace again, you can re-open it. For instructions, see "[Opening Workspaces](#)" on page 55.

Note: If you no longer need the workspace, you can remove it permanently. For instructions, see "[Deleting Workspaces](#)" on page 61.

To close a workspace

- Click  **Close** on the tab for the workspace you want to close, or
- Click  **Menu** on the tab for the workspace, and select **Close**, or
- Open the tab finder by clicking  and then click  in the tab finder for the workspace you want to close.

Deleting Workspaces

If you no longer need a workspace, you can remove it permanently by deleting it.

Note: If you just want to temporarily close a workspace because you do not need it open, see "[Closing Workspaces](#)" on page 61.

Note: To delete a workspace, you must either be the owner of the workspace, or if you are using a workspace that another user has shared with you, you must have “Full Control” permissions for the workspace. For more information about sharing workspaces, see ["Sharing Workspaces" on page 60](#).

To delete a workspace

- On the tab for the workspace, click ▼ **Menu** and select **Delete Workspace**, or
- On the **Navigate** tab of the navigation pane, right click the workspace name and select **Delete Workspace**.

About Adding Workspaces to the Navigation Pane

For easy access to workspaces, you can add them to the **Navigate** tab in the **Workspaces** section of the navigation pane. You can add workspaces that you own and those that other users have shared with you.

When you no longer need a workspace in the navigation, you can remove it. When you remove a workspace from the navigation, it is *not* deleted; the workspace is simply no longer listed in the navigation pane.

You can organize and group the workspaces in your navigation pane by creating workspace folders, and then adding the workspaces to your custom folders.

Adding Workspaces to the Navigation Pane

When you add a workspace to the navigation pane, you select the workspace folder in which you want the workspace to reside.

You can add workspaces to an existing folder, or if you want to use a different folder, add it *before* adding the workspace to the navigation pane. You can add the same workspace to the navigation multiple times if you add it under different folders. For information about adding folders, see ["Adding a Workspace Folder to the Navigation Pane" on page 63](#).

To add a workspace to the navigation pane

1. In the navigation pane, click the **Navigate** tab.
2. In the **Workspaces** section, right click the name of the folder in which you want to add the workspace and select **Add Workspace to Folder**.
3. In the Select Workspaces window, search for the workspace you want to add:
 - a. In the **Keyword** field, type keywords that My webMethods uses to search for workspaces. My webMethods matches the keywords you specify against workspace names and keywords assigned to the workspaces.
 - b. In the **Search In** field, select the folders in which to look for matching workspaces.

- c. Indicate whether you want to search for only workspaces for which you are the owner or also those that other users have shared with you.
 - To search only your own workspaces, select the **Include only workspaces I own** check box.
 - To search all workspaces to which you have access, clear the **Include only workspaces I own** check box.
 - d. Click **Search**.
4. In the Results panel, select the workspace(s) you want to add the navigation pane.
 5. Click **OK**.

Note: You might need to expand the workspace folder to see the workspaces that you just added to it.

Removing Workspaces from the Navigation Pane

If you no longer need access to a workspace from the navigation pane, you can remove it. When you remove a workspace from the navigation, it is *not* deleted; the workspace is simply no longer listed in the navigation pane.

To remove a workspace from the navigation pane

1. In the navigation pane, click the **Navigate** tab.
2. In the **Workspaces** section, right click the name of the workspace that you want to remove and select **Remove Workspace**.

Adding a Workspace Folder to the Navigation Pane

To organize and group workspaces in the navigation pane, you can add workspace folders, and then add workspaces to the folders. When you add a folder, you select a parent folder for the new folder. The new folder becomes a subfolder of an existing folder.

To add a workspace folder

1. In the navigation pane, click the **Navigate** tab.
2. In the **Workspaces** section, right click the name of an existing folder and select **Create New Folder**.

The new folder will become a subfolder of the selected folder.

3. In the Create New Folder window in the **Name of New Folder** field, type a name for the folder.
You can specify from 1 through 255 characters for the name. You can use any characters, including non-ASCII or special characters.

4. Click **OK**.

Renaming a Workspace Folder in the Navigation Pane

Use the following procedure to rename an existing workspace folder in the navigation pane.

To rename a workspace folder

1. In the navigation pane, click the **Navigate** tab.
2. In the **Workspaces** section, right click the name of you want to rename and select **Rename Folder**.
3. In the Rename Folder window in the **New Name for Folder** field, type a new name for the folder.

You can specify from 1 through 255 characters for the name. You can use any characters, including non-ASCII or special characters.

4. Click **OK**.

Removing a Workspace Folder from the Navigation Pane

If you no longer need a workspace folder in the navigation pane, you can delete it. When you delete a workspace folder, My webMethods removes the folder and its content from the navigation pane. If the folder contains workspaces, those workspaces are also removed from the navigation. The workspaces are *not* deleted; they are simply no longer listed in the navigation pane.

To remove a workspace folder from the navigation pane

1. In the navigation pane, click the **Navigate** tab.
2. In the **Workspaces** section, right click the name of the folder that you want to remove and select **Delete Folder**.

My webMethods removes the folder and its content from the navigation.

5 Working with Workspace Content

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About Workspace Content

You can add the content that you want to a workspace. Typically, you create a workspace to have one single location to hold information related to a specific issue or topic, and add content related to that issue or topic. For example, if you are responsible for tracking information related to new hires for your company, you might create a workspace for each new employee. You can attach documents related to the new employee, add an image of the new employee, add reminders of actions you still need to take, etc.

As the owner of a workspace, you can take all actions against windows in a workspace. However, if you are using a workspace that another user has shared with you, your actions might be limited based on the permissions the owner of the workspace assigned to you. For example, you might only be granted the permission to view information and not be allowed to modify it. For more information about sharing workspaces, see ["Sharing Workspaces" on page 60](#).

Adding Tools to a Workspace

You can add as many tools as you want to a workspace. You can use the same tool multiple times. For a description of the tools that My webMethods provides as installed, see ["Using Tools to Enhance Workspaces" on page 75](#).

Note: To add new content to a workspace you must either be the owner of the workspace, or if you are using a workspace that another user has shared with you, you must have "View and Modify" or "Full Control" permissions for the workspace. For more information about sharing workspaces, see ["Sharing Workspaces" on page 60](#).

To add a tool to a workspace

1. Open the workspace to which you want to add content. For instructions, see ["Opening Workspaces" on page 55](#).
2. In the navigation pane, click the **Tools** tab.
3. Drag the tool from the navigation pane on to the workspace in the content area.
4. On the tab for the workspace, click ▼ **Menu** and select **Save Workspace**.

Adding Windows from Application Pages to a Workspace

You can add windows from application pages to your workspaces. This is useful when the information in the application pertains to the data you are placing in a workspace. For example, if you have a workspace to track information about new employees and

you have a business process in place for managing the tasks related to new hires, you might add application page windows that are related to the new hire business process.

If the window you want to add to a workspace is wired (connected) to another window on the application page, My webMethods breaks that connection so that the window can stand alone on the workspace page. The window keeps its preferences that were set at the time you added it to the workspace.

For example, if you add a search results window to a workspace, My webMethods breaks the connection between the search panel and the search results. Its preferences are set to the search criteria that were used to retrieve the search results. The search results panel added to a workspace will continue to reflect the results for the search criteria.

If more items match the criteria, the search results will show more items. If less items match the criteria, the search results will show less items. However, keep in mind that My webMethods caches search results. So to update the search results in a tab, you must take an action that causes My webMethods to update the window on the workspace, such as closing and re-opening the workspace.

Note: To add new content to a workspace you must be either the owner of the workspace, or if you are using a workspace that another user has shared with you, you must have **View and Modify** or **Full Control** permissions for the workspace. For more information about sharing workspaces, see ["Sharing Workspaces" on page 60](#).

To add a window from an application page to a workspace

1. In the navigation pane, click the **Navigate** tab.
2. In the **Applications** section, navigate to the page that contains the window you want to add to a workspace.
3. In the title bar of the window that you want to add to the workspace, click  **Tools**.
4. Click **Add to Workspace**.

Note: If a window on an application page cannot function properly outside of its application page, the **Add to Workspace** function is not available.

5. In the Add to Workspace window, search for the workspace to which you want to add content.
 - a. In the **Keyword** field, type keywords that My webMethods uses to search for workspaces. My webMethods matches the keywords you specify against workspace names and keywords assigned to the workspaces.
 - b. In the **Search In** field, select the folders in which to look for a matching workspaces.
 - c. Indicate whether you want to search for only workspaces for which you are the owner or also those that other users have shared with you.
 - To search only your own workspaces, select the **Include only workspaces I own** check box.

6. In the Results panel, select the workspace(s) to which you want to add the window.
7. Click **Add**.

General Properties for a Window in a Workspace

You can open the properties of a window to view or set them. The properties are grouped on tabs. All windows have a **General** tab that contains the general properties, which are described in the table below.

Note: Some windows also have properties listed on a **Preferences** tab. The preferences are specific to the window. See information for the specific window for instructions for viewing and setting preferences.

Section	Property	Description
General	Name	The name of the window that My webMethods displays in the window's title bar. For instructions for changing the window name, see " Renaming a Window in a Workspace " on page 70.
	Description	A description for the window. Note: Currently the description is only listed in the properties and is not used by My webMethods for any specific purpose. For instructions for changing the window description, see " Updating the Description of a Window " on page 71.
Display	Full Page View	This property is intended for expert users. It defines the presentation (view) to use for the window when a user enters its URL to navigate directly to the window.
	Portlet View	This property is intended for expert users. It defines the presentation (view) to use for the window when viewing it in a workspace.
Maintenance	Owner	The user name of the user that owns the window.

Section	Property	Description
	Created On	The date and time the window was added to the workspace.
	Modified On	The date and time of the last time the window was updated.
	Aliases	This property is intended for expert users. A window can have zero, one, or more aliases. An alias defines an alternative way to access a window. Workspace developers might need to add aliases if they are building complex multi-page applications and need to refer to individual windows, for example, when creating navigation from one page to another and need to pass parameters to a specific window. For more information about aliases, see <i>Administering My webMethods Server</i> .

Viewing Window Properties

Use the following procedure to view the properties for a window.

To view the properties for a window

1. In the title bar of the window, click  **Tools**.
2. Select **Properties**.
3. Select the tab for the properties you want to view.
4. Click **Cancel** to close the properties without making changes.

Renaming a Window in a Workspace

When you add a window to a workspace, My webMethods assigns it a name. You can change its name by updating the general properties.

Names of windows must be unique within a workspace. If you add the same window a subsequent time, My webMethods appends “(n)” to the name to make the name unique.

Note: To update the properties of a window you must either be the owner of the workspace, or if you are using a workspace that another user has shared with you, you must have “View and Modify” or “Full Control” permissions for the workspace. For more information about sharing workspaces, see ["Sharing Workspaces" on page 60](#).

To rename a window in a workspace

1. In the title bar of the window you want to rename, click  **Tools**.
2. Select **Properties**.
3. Select the **General** tab.
4. Type a new name in the **Name** field.
You can specify from 1 through 255 characters for the name. You can use any characters, including non-ASCII or special characters.
5. Click **Apply**.
6. On the tab for the workspace, click  **Menu** and select **Save Workspace**.

Updating the Description of a Window

When you add a window to a workspace, by default it has no description associated with it. You can add a description that appears in the window's properties.

Note: To update the properties of a window you must either be the owner of the workspace, or if you are using a workspace that another user has shared with you, you must have "View and Modify" or "Full Control" permissions for the workspace. For more information about sharing workspaces, see ["Sharing Workspaces" on page 60](#).

To update the description of a window

1. In the title bar of the window for which you want to add or update the description, click  **Tools**.
2. Select **Properties**.
3. Select the **General** tab.
4. Type a new description in the **Description** field.
You can specify from 1 through 255 characters for the description. You can use any characters, including non-ASCII or special characters.
5. Click **Apply**.
6. On the tab for the workspace, click  **Menu** and select **Save Workspace**.

Finding Windows in a Workspace

As you add many windows to a workspace, it might take time locating the window you want to use by scanning the workspace. This is especially true if your workspace uses a free form layout; in this case, windows might be overlapping hiding the window you

want to use. For more information on workspace layouts, see "[Defining the Layout of a Workspace](#)" on page 53.

To locate a specific window and make it the current window, use the window finder. If the workspace uses a free form layout and the window you want to use is hidden, when you make a window the current window, My webMethods brings that window to the front.

To find a window in a workspace

1. In the upper, right corner of the workspace click  **Window Finder**.
2. In the Window Finder, select the name of the window that you want to make the current window.

Resizing Windows

My webMethods provides many functions to allow you to resize windows within a workspace. You can:

- **Minimize a window** so that My webMethods displays only the window's title bar. Use this function when you do not need to see the content of the window.
- **Maximize a window** so that it uses the full size of the content area. Use this function when you need more space for a window.
- **Restore a window** to its previous size. Use this function if you previously minimized it and now want to view its content again, or if you previously maximized the window and no longer require the window to use the full content area.
- **Best fit the size of a window** so that My webMethods determines the best size to use for a window.
 - If you are using a free form layout for the workspace, the window is resized to fit its contents.
 - If you are using a column layout (for example, **Two Columns**), the window resizes vertically to fit the window contents and horizontally to fit the column width.
- **Customize the size of a window** by dragging the edge of the window to make it any size you want.

Note: To resize windows in a workspace you must either be the owner of the workspace, or if you are using a workspace that another user has shared with you, you must have "View and Modify" or "Full Control" permissions for the workspace. If you have "View Only" permission to a workspace, you can resize windows; however, you cannot save the changes. As a result, when you leave the workspace the windows will revert to their previous state. For more information about sharing workspaces, see "[Sharing Workspaces](#)" on page 60.

To resize a window

- **To minimize a single window:**
 - In the title bar of a window, click  **Minimize**.
 - In the title bar of the window, click  **Tools** and select **Minimize**.
- **To minimize all windows in a workspace**, in the upper, right corner of the workspace click  **Window Finder** and select **Minimize All**.
- **To maximize a window:**
 - In the title bar of a window, click  **Maximize**.
 - In the title bar of the window, click  **Tools** and select **Maximize**.
- **To restore a window:**
 - In the title bar of a window, click  **Restore**.
 - In the title bar of the window, click  **Tools** and select **Restore**.
- **To restore all windows in a workspace**, in the upper, right corner of the workspace click  **Window Finder** and select **Restore All**.
- **To automatically resize the window to the best fit**, in the title bar of the window, click  **Tools** and select **Auto Size**.
- **To make the window a custom size**, drag the edges of the window to the size you want.

Note: If you are using a column layout for the workspace (for example, Two Columns), and drag a window larger than the column width, the column width will increase to accommodate the new width of the window.

After resizing windows, save the workspace to keep your changes by clicking  **Menu** on the tab for the workspace and selecting **Save Workspace**.

Positioning Windows in a Workspace

Where you can position windows in a workspace depends on the layout you use for a workspace.

- When using a free form layout, you can move windows anywhere within the workspace. Windows do not have to be aligned and can overlap one another.
- When using a column layout (for example, Three Columns), the layout forces the windows to be aligned within the columns. You can move windows up and down within a column or from one column to another.

Note: To reposition windows in a workspace you must either be the owner of the workspace, or if you are using a workspace that another user has shared with you, you must have “View and Modify” or “Full Control” permissions for the workspace. If you

have “View Only” permission to a workspace, you can reposition windows; however, you cannot save the changes. As a result, when you leave the workspace the windows will revert to their previous state. For more information about sharing workspaces, see ["Sharing Workspaces" on page 60](#).

To position a window in a workspace

1. In the window you want to reposition, move your cursor over the title bar of the window until My webMethods displays the move cursor.
2. Click and drag the window to the new location.
3. On the tab for the workspace, click ▾ **Menu** and select **Save Workspace**.

Deleting Windows from a Workspace

If you no longer need or want a window, you can delete it from the workspace.

Note: To delete windows from a workspace you must either be the owner of the workspace, or if you are using a workspace that another user has shared with you, you must have “View and Modify” or “Full Control” permissions for the workspace. For more information about sharing workspaces, see ["Sharing Workspaces" on page 60](#).

To delete a window from a workspace

- In the title bar of the window, click ▾ **Tools** and select **Delete**, or
- In the upper, right corner of the workspace click  **Window Finder** and click **Delete** for the window you want to remove from the workspace.

After deleting windows, save the workspace to keep your changes by clicking ▾ **Menu** on the tab for the workspace and selecting **Save Workspace**.

6 Using Tools to Enhance Workspaces

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MWS Monitoring and Diagnostics Tools

When you add a tool to a workspace, My webMethods adds a new window to the workspace that is specific to the added tool. For information about working with windows in a workspace, see ["Working with Workspace Content" on page 65](#).

Note: To add new content to a workspace you must either be the owner of the workspace, or if you are using a workspace that another user has shared with you, you must have "View and Modify" or "Full Permission" permissions for the workspace. For more information about sharing workspaces, see ["Sharing Workspaces" on page 60](#).

My webMethods provides tools for monitoring and diagnosing. Those tools are available from the navigation pane, in the **MWS Monitoring and Diagnostics** section of the **Tools** tab.

Important: The following diagnostic portlets are available only with My webMethods Server 8.2 or later. You cannot use the diagnostic portlets to diagnose My webMethods Server 7.1.3, or My webMethods Server 8.0.

The following table provides a brief description of each of the tools. For more information, see *Diagnosing My webMethods Server*.

Tool	Use to...
Log Analysis Datasource	Read and analyze log files created within My webMethods Server.
Log Analysis Time Period	Configure a time period for creating log files within My webMethods Server.
Log Configuration	Set the log message collection criteria.
Log Errors by Severity	Analyze and display logs of WARNING, ERROR, or FATAL severity.
Log FATAL Issues	Analyze and display logs only of FATAL severity
Log Issues	Analyze and display logs of WARNING, ERROR, or FATAL severity.
Log Issues by Component	Analyze and display logs by the component in which they appear.

Tool	Use to...
Log Issues by Product	Analyze and display logs by the product in which they appear.
Log Viewer	View the latest messages in plain text log files of My webMethods Server.
Most Used Portlets	Display statistics about the ten most used portlets in My webMethods Server.
Most Used Web Services	Display statistics about the ten most used Web services in My webMethods Server.
SOAP Traffic Monitor	Debug issues with web service calls from other portlets.
Performance Analysis	Measure and analyze the performance of My webMethods Server services and custom portlets or applications.
Performance Statistics	Display statistic and analysis information about the performance of various My webMethods Server actions which are grouped by categories.
Slow Database Calls	Display information about ten of the slowest database calls in My webMethods Server.
Slow Portlets	Display performance information about ten of the slowest portlets in My webMethods Server.
Slow Web Services	Display performance information about ten of the slowest Web services in My webMethods Server.
Http Information	Provide context information about the Servlet Container for My webMethods Server.
Memory Monitor	Monitor the memory usage of the Java Virtual Machine (JVM) and send notifications to administrators when configured threshold limits are reached.
Thread Dump	Monitor thread execution deadlocks in My webMethods Server threads.

Workspace Tools

When you add a tool to a workspace, My webMethods adds a new window to the workspace that is specific to the added tool. For information about working with windows in a workspace, see ["Working with Workspace Content" on page 65](#).

Note: To add new content to a workspace you must either be the owner of the workspace, or if you are using a workspace that another user has shared with you, you must have "View and Modify" or "Full Permission" permissions for the workspace. For more information about sharing workspaces, see ["Sharing Workspaces" on page 60](#).

My webMethods provides various tools for workspace enhancement. Those tools are available from the navigation pane, in the **Workspace Tools** section of the **Tools** tab. The following table lists the tools that My webMethods provides as installed and where you can find more information about each tool.

Tool	Use to...	For more information, see...
Attachments	Attach files to your workspace.	"Attachments Tool" on page 79
Bookmarks	Add links to workspaces and web sites.	"Bookmarks Tool" on page 82
Directory Browser	Find identification information about other My webMethods users.	"Directory Browser Tool" on page 84
HTML Text	Add formatted text to a workspace.	"HTML Text Tool" on page 85
Image	Add an image to a workspace.	"Image Tool" on page 86
Note	Add simple, unformatted text to a workspace.	"Note Tool" on page 88
User Calendar	Add a user's calendar to a workspace.	"User Calendar Tool" on page 90

Attachments Tool

The Attachments tool allows you to attach files to a workspace. For example, if you create a workspace to track requirements for a new project, you could use the Attachments tool to attach documents related to the project.

You can select the type of links to use for attached files by setting the Attachments tool preferences. My webMethods supports two types of links for attached files:

- **Simple download links.** This is the default. With this type of link, when you click a link My webMethods displays a read-only version of the file. To make changes to the file, you need to save a copy locally, make your changes, and then update the attached file.
- **Web Distributed Authoring and Versioning (DAV) URLs.** With this type of link, when you click the link My webMethods can typically display a read-write version of the file. As a result, you can make changes to the file and save them without having to first save the file locally. To use Web DAV URLs, you must meet the following requirements:
 - Use the Microsoft Internet Explorer web browser.
 - For the types of Microsoft office documents that you want to attach, for example, .doc or .xls, configure the file type so that when browsing, it opens in a new window. In Windows Explorer in the advanced file type configuration, clear the “Browse in the same window” check box. For more information, see Microsoft documentation for Windows Explorer.
 - Ensure you have installed all Microsoft Office updates for opening files read/write in Microsoft Internet Explorer and for using Web DAV URLs. Known updates that are required are:
 - <http://support.microsoft.com/kb/870853>
 - <http://support.microsoft.com/kb/884050>

Attaching Files to a Workspace

When using the Attachments tool to attach files, you can:

- Browse to select the files you want to attach.
- Drag and drop the documents you want to attach into the attachments window.

Note: You control whether you can attach files using drag and drop by setting the Attachments tool preferences. For more information, see "[Setting Preferences for an Attachments Window](#)" on page 80.

After adding the Attachments tool, you can rename the window, reposition it, and resize it. For more information about managing windows in a workspace, see ["Working with Workspace Content" on page 65](#).

To attach files to a workspace

1. In the navigation panel, click the **Tools** tab.
2. In the **Workspace Tools** section, drag the **Attachments** tool on to the workspace in the content area.
3. Attach one or more files by doing one of the following:
 - **Browse for and select files you want to add:**
 - i. In the attachments window, click **Add**.
 - ii. In the Attach Files window, click **Browse**.
 - iii. Browse to the location of the file to be attached and click **Open**.
 - iv. If you want to add an additional file, click **Attach Another File** and repeat the steps to attach a file.
 - v. When you have finished selecting all the files you want to attach, click **Save**.
 - **Drag and drop files you want to add:**

Note: Whether you can use drag and drop is controlled by a property for the attachments window. You can configure the properties so that My webMethods does not display the **Drop files here** box. For more information, see ["Setting Preferences for an Attachments Window" on page 80](#).

 - i. Open a file browser application for your local file system.
 - ii. In the file browser, browse to the location of the files you want to attach.
 - iii. Drag the files you want to attach from the file browser into the **Drop files here** box in the attachments window in your workspace.
 - iv. Click **Attach**.
4. On the tab for the workspace, click ▼ **Menu** and select **Save Workspace**.

Setting Preferences for an Attachments Window

The Attachments tool preferences control whether My webMethods:

- Uses simple download URLs or Web DAV URLs for attached files. Web DAV files can allow you to make updates to attached files without having to save them locally. For more information, see ["Attachments Tool" on page 79](#).
- Displays the user interface control that allows you to attach files using drag and drop.

To set properties for an attachments window

1. In the title bar of the attachment window, click  **Menu**.
2. Select **Properties**.
3. Select the **Preferences** tab.
4. To indicate the type of links to use for attached files:
 - Clear the **Use Web DAV urls** check box to use simple download links.
 - Select the **Use Web DAV urls** check box to use Web DAV URLs.

For more information about the differences between simple download links and Web DAV URLs, see "[Attachments Tool](#)" on page 79.

5. If you do not want My webMethods to display the **Drop files here** box in the attachment window, clear the **Allow Drag n Drop** check box. When this check box is cleared, you will not be able to attach files by dragging them from the file browser.
6. Click **Apply**.

Updating an Attachment

You can update the files you have listed in the attachments window.

To update an attachment

1. In the attachments window in the row for the attachment that you want to update, click .
2. Select **Update**.
3. In the Update Attachment window, click **Browse**.
4. Browse to the location of the file you want to use in place of the current file and click **Open**.
5. Click **Update**.

Removing an Attachment

If you no longer want a file attached to the workspace, you can delete it from the attachments window.

To remove an attachment

1. In the attachments window in the row for the attachment that you want to remove, click .
2. Select **Remove**.

Bookmarks Tool

The Bookmarks tool allows you to add links to:

- External web pages
- Other My webMethods workspaces

After adding bookmarks to external web pages and workspaces, you have quick access to them. To view the page or workspace you only need to click a link in the bookmarks window.

Use the Bookmarks tool to add bookmarks to pages that are related to a workspace. For example, if you create a workspace to track requirements for a new project and find several web sites that provide information that you might want to consider, you can use the Bookmarks tool to add links to the web sites for easy access to the information.

Adding Bookmarks to a Workspace

When using the Bookmarks tool, you can add bookmarks to:

- External web pages by specifying an URL to the page.
- Other My webMethods workspaces by searching for and selecting a workspace.

After adding the Bookmarks tool, you can rename the window, reposition it, and resize it. For more information about managing windows in a workspace, see "[Working with Workspace Content](#)" on page 65.

To add bookmarks to a workspace

1. In the navigation pane, click the **Tools** tab.
2. In the **Workspace Tools** section, drag the **Bookmarks** tool on to the workspace in the content area.
3. To add bookmarks to workspaces:
 - a. Click **Add Workspace**.
 - b. In the Select Workspaces window, fill in the following fields to search for the workspaces for which you want to add bookmarks.
 - i. In the **Keyword** field, type keywords that My webMethods uses to search for workspaces. My webMethods matches the keywords you specify against workspace names and keywords assigned to the workspaces.
 - ii. In the **Search In** field, select the folders in which to look for matching workspaces.

- iii. Select the **Include only workspaces I own** check box if you only want to search for workspaces that you own. Clear the check box if you also want to search for workspaces that others have shared with you.
 - iv. Click **Search**.
 - My webMethods displays matching workspaces in the Results panel.
 - c. In the search results, select the check boxes for the workspaces for which you want to add bookmarks.
 - d. Click **OK**.
4. To add bookmarks to web pages:
 - a. Click **Add Link**.
 - b. In the **Title** field, type descriptive text for the bookmark.
 - c. In the **Location** field, type the URL for the page you want to bookmark.
 - d. Click **Save**.
5. On the tab for the workspace, click **▼ Menu** and select **Save Workspace**.

Using the Bookmark Tool to Access Bookmarked Pages

To display bookmarked pages

- Click the title of the bookmark in the bookmarks window.

Updating a Bookmark Title or URL

After adding bookmarks, you can update the following:

- For a bookmark to a workspace, you can update the title listed for the workspace in the bookmarks window.
- For a bookmark to an external page, you can update the title and the URL for the external page.

Additionally, you can update whether the workspace or page opens in the same web browser window or a new window. For more information, see "[Changing Whether a Bookmark is Opened in the Current or New Window](#)" on page 84.

To update a bookmark

1. In the bookmarks window in the row for the bookmark that you want to update, click .
2. Select **Edit**.
3. If you want to change the title My webMethods displays in the bookmarks window, type a new title in the **Name** field.

4. For a bookmark to a web page if you want to change the URL, type the new URL in the **URL** field.
5. Click **Save**.

Changing Whether a Bookmark is Opened in the Current or New Window

You can select whether you want My webMethods to open a workspace and/or external page in the current window or in a new web browser window.

To change whether a bookmark is opened in the current or new window

1. In the bookmarks window in the row for the bookmark that you want to update, click .
2. Select **Edit**.
3. If you want the bookmark to open in the current window, in the **Open Bookmark** part of the panel select the **in current window** option.
4. If you want the bookmark to open in a new window, in the **Open Bookmark** part of the panel select the **in a new window** option.
5. Click **Save**.

Deleting Bookmarks

If you no longer need a bookmark to a workspace or external page, you can delete it from the bookmarks window.

To delete a bookmark

1. In the bookmarks window in the row for the bookmark that you want to delete, click .
2. Select **Delete**.

Directory Browser Tool

The Directory Browser tool allows you to find information about other My webMethods users. The information that you can display is a subset of the identification information from the My webMethods profile, such as the user ID, full name, e-mail address, instant messenger user names, etc.

Add the Directory Browser tool to a workspace if you want quick access to the search window to find user information. For example, if you create a workspace to track requirements for a new project and need to contact other users in the project, you can add a directory browser so that you easily find user information for the other users.

Adding Directory Browsers to Workspaces

To add a directory browser to a workspace, use the following procedure.

After adding the Directory Browser tool, you can rename the window, reposition it, and resize it. For more information about managing windows in a workspace, see ["Working with Workspace Content" on page 65](#).

To add a directory browser

1. In the navigation pane, click the **Tools** tab.
2. In the **Workspace Tools** section, drag the **Directory Browser** tool on to the workspace in the content area.
3. Use the directory browser to search for users, groups, and/or roles. For instructions, see ["Searching for Users, Groups, and Roles" on page 93](#).
4. On the tab for the workspace, click **▼ Menu** and select **Save Workspace**.

HTML Text Tool

The HTML Text tool allows you to add formatted text to a workspace. For example, you can use different font sizes and styles; make text bold, italics, or underlined; use different colors for the text; highlight text; align text; add a CSS style sheet; use bullet lists and numbered lists.

Use the HTML Text tool to add text that is related to a workspace. For example, if you create a workspace to track requirements for a new project you might want to have a bullet list or numbered list on your workspace to itemize information about the project.

Adding Formatted Text to Workspaces

Use the procedure below to add formatted text to a workspace.

After adding the HTML Text tool, you can rename the window, reposition it, and resize it. For more information about managing windows in a workspace, see ["Working with Workspace Content" on page 65](#).

To add formatted text to a workspace

1. In the navigation pane, click the **Tools** tab.
2. In the **Workspace Tools** section, drag the **HTML Text** tool on to the workspace in the content area.
3. In the new HTML Text window on the workspace, select the **Edit Text** link.

My webMethods changes the window to an input mode, displaying the basic formatting tools at the top of the window.

4. To view the advanced formatting tools, click  **Toggle advanced toolbar**.
5. Type text in the edit text box using the formatting tools to format the text.
6. Click **Apply**.
7. On the tab for the workspace, click  **Menu** and select **Save Workspace**.

Updating Existing Formatted Text

You can update the text in an HTML text window. Use the following procedure to access the edit mode so that you can update the text.

To update formatted text

1. In the title bar of the note window, click  **Menu**.
2. Select **Properties**.
3. Select the **Preferences** tab.
My webMethods displays the text in edit mode.
4. To view the advanced formatting tools, click  **Toggle advanced toolbar**.
5. Update the text in the input text box using the formatting tools to format the text.
6. Click **Apply**.

Image Tool

The Image tool allows you to add an image file to a workspace. You can add any type of image file that your web browsers supports, for example, .gif, .jpg, .bmp, or .png.

Use the Image tool to add an image that is related to a workspace. For example, if you create a workspace to track requirements for a new project you might have an image of a screen that is related to the project and want to display that on the workspace.

Note: If you want to include text with an image, use the HTML Text tool; see "[HTML Text Tool](#)" on page 85.

Adding an Image to a Workspace

When using the Image tool, you can add image files by:

- Specifying the URL to an image file.
- Uploading an image file that resides in your file system.

By default, My webMethods displays the image using its actual size. However, you can optionally specify the width and height you want My webMethods to use for the image.

After adding the Image tool, you can rename the window, reposition it, and resize it. For more information about managing windows in a workspace, see "[Working with Workspace Content](#)" on page 65.

To add an image to a workspace

1. In the navigation pane, click the **Tools** tab.
2. In the **Workspace Tools** section, drag the **Image** tool on to the workspace in the content area.
3. In the new Image window on the workspace, select the **Click Here** link.
4. Identify the image file that you want to add to the workspace:
 - **To identify an image available from an URL:**
 - i. Select the **External Url** option.
 - ii. In the **Image Url** field, type the URL for the image you want to add to the workspace.
 - **To identify an image located on your machine:**
 - i. Select the **Upload File** option.
 - ii. In the **Select Image File** field, type the path to the image file or click **Browse** to select the file.
 - iii. Click **Upload File**.
5. If you want to define the size of the image in the workspace, perform the following steps.
 - a. In the **Image Height** field, type the number of pixels (such as, 80px) or the percentage (such as, 80%) to use for the height of the image.
 - b. In the **Image Width** field, type the number of pixels (such as, 80px) or the percentage (such as, 80%) to use for the width of the image.

Note: If you do not specify the size, My webMethods uses the images actual size.

6. Click **Apply**.
7. On the tab for the workspace, click ▾ **Menu** and select **Save Workspace**.

Updating an Image in a Workspace

Use the following procedure to update an image displayed in a workspace.

To update an image in a workspace

1. In the title bar of the note window, click ▾ **Menu**.
2. Select **Properties**.
3. Select the **Preferences** tab.

4. In the Image Properties window, identify the image file that you want to add to the workspace:
 - **To identify an image available from an URL:**
 - i. Select the **External Url** option.
 - ii. In the **Image Url** field, type the URL for the image you want to add to the workspace.
 - **To identify an image located on your machine:**
 - i. Select the **Upload File** option.
 - ii. In the **Select Image File** field, type the path to the image file or click **Browse** to select the file.
 - iii. Click **Upload File**.
 5. If you want to define the size of the image in the workspace, perform the following steps.
 - a. In the **Image Height** field, type the number of pixels (such as, 80px) or the percentage (such as, 80%) to use for the height of the image.
 - b. In the **Image Width** field, type the number of pixels (such as, 80px) or the percentage (such as, 80%) to use for the width of the image.
- Note:** If you do not specify the size, My webMethods uses the images actual size.
6. Click **Apply**.

Note Tool

The Note tool allows you to add simple text to a workspace. With the Note tool, you cannot specify formatting options for the text. If you need more complex text that requires formatting, such as using bullet lists, using numbered lists, or specifying font size, style, color, use the HTML Text tool. For information, see ["HTML Text Tool" on page 85](#).

Use the Note tool to add simple text that is related to a workspace. For example, you might want to add a short reminder of a task you need to complete for a workspace.

Adding Simple Notes to a Workspace

Use the procedure below to add simple text to a workspace.

After adding the Note tool, you can rename the window, reposition it, and resize it. For more information about managing windows in a workspace, see ["Working with Workspace Content" on page 65](#).

You can also set the preferences for the window to change the background color of the note and/or add the last update date to the note. For instructions, see ["Changing the](#)

[Background Color of a Note](#) on page 89 and [Adding the Last Update Date to a Note](#) on page 89.

To add a simple note to a workspace

1. In the navigation pane, click the **Tools** tab.
2. In the **Workspace Tools** section, drag the **Note** tool on to the workspace in the content area.
3. In the new Note window on the workspace, click the default text, “Enter your text here”.
My webMethods changes the window to an edit mode.
4. Type the text you want for the note over the existing text.
5. After specifying your text, click outside of the Note window.
6. On the tab for the workspace, click **▼ Menu** and select **Save Workspace**.

Changing the Background Color of a Note

You can update the preferences for the note window to change the background color of a note.

To change the background color of a note

1. In the title bar of the note window, click **▾ Menu**.
2. Select **Properties**.
3. Select the **Preferences** tab.
4. In the **Back Ground Color** field, select the color you want to use.
5. Click **Apply**.

Adding the Last Update Date to a Note

You can update the preferences for the note window to add the last date and time the note was updated.

To add the last update date and time to a note

1. In the title bar of the note window, click **▾ Menu**.
2. Select **Properties**.
3. Select the **Preferences** tab.
4. Select the **Show Last Updated Date** check box.
5. Click **Apply**.

Updating the Text of an Existing Note

You can update the text in a note window. Use the following procedure to access the edit mode so that you can update the text.

To update the text of an existing note

1. In the note window, click the existing text.
My webMethods changes the window to an edit mode.
2. Type the new text you want for the note.
3. After specifying your text, click outside of the Note window.
4. On the tab for the workspace, click ▾ **Menu** and select **Save Workspace**.

User Calendar Tool

The User Calendar tool allows you to show the availability of a user by adding the user's calendar to a workspace. You can add your own calendar or another user's calendar.

Note: User calendars will only show information if an administrator has configured the use of user calendars for the system and if the user's e-mail address is configured in the My webMethods profile.

Adding Your Calendar to a Workspace

To add your user calendar to your workspace use the following procedure.

To add your calendar to a workspace

1. In the navigation pane, click the **Tools** tab.
2. In the **Workspace Tools** section, drag the **User Calendar** tool on to the workspace in the content area.

By default My webMethods configures the user calendar window to show your user calendar. To configure the window to display another user's calendar, see "[Changing to View Another User's Calendar](#)" on page 90.

Changing to View Another User's Calendar

To update a user calendar in a workspace so that it displays the calendar for another user, use the following procedure.

To change the calendar to display another user's calendar

1. In the top line of the user calendar window after the user name, click [...].
2. In the **Calendar Configuration** panel, click **Select**.
3. Use the Select Principal window to search for and select the user whose calendar you want to display. For instructions, "[Searching for Users, Groups, and Roles](#)" on page 93.
4. After selecting the user, click **Apply** to close the Select Principal window.
5. In the user calendar window, click **Apply**.

7 Searching for Users, Groups, and Roles

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About Searching for Users, Groups, and Roles

My webMethods has a standard search panel for searching for users, groups, and/or roles. Many webMethods applications use this search panel in application pages. Also My webMethods uses the search panel in workspace tools that require finding a user, group, or role. The following shows the search panel.

The search panel might have some differences based on the context of the search. For example:

- The **Directory** field is not always included on the search panel. Also, My webMethods removes the **Directory** field when searching for roles.
- The **Search For** field is omitted when you can only search for type, for example, only search for users.
- The **Advanced** tab is not always included. In this situation the search panel is a single panel with the search fields from the **Keyword** tab.

Keyword Searches

Use a *keyword search* to locate users, groups, or roles that contain the keywords that you specify.

When you initiate a search, you select whether you want to search for users, groups, or roles, and specify the keywords to use in the search. My webMethods matches the keywords against user IDs, group IDs, or role IDs based on whether you are searching for users, groups, or roles.

You can use the following special characters in your keywords:

- **Embed an asterisk (*) any place within a keyword to match multiple characters.** The asterisk functions as a wildcard character. For example, if you want to locate all groups with group IDs that contain the letter “b” and “c” with any number of characters between, type b*c as the keyword.

- **Enclose a keyword in quotations (" ") to match an exact string.** For example, if you want to locate all users with user IDs that contain the string "acct", type "acct". Note that the search for exact phrases is case insensitive.

My webMethods performs an AND operation on the keywords you specify. In other words, all keywords that you specify must be present for My webMethods to include a user, group, or role in the search results. Additionally, My webMethods searches as if you had enclosed each keyword within asterisks. For example, if you specify the keyword `bbb`, My webMethods searches as if you specified `*bbb*` and returns entries that:

- Are equal to the keyword itself, for example, 'man' returns 'man'
- Start with the keyword, for example, 'man' returns 'manual' and "manufacturer"
- End with the keyword, for example, 'man' returns 'roman' and "snowman"
- Have the keyword embedded, for example, 'man' returns 'romantic' and 'adamant'

My webMethods does not take the order in which you specify keywords into consideration. It returns matching items regardless of the order in which the keywords occur.

Performing a Keyword Search for Users, Groups, or Roles

Use the procedure below to perform a keyword search for users, groups, or roles. Based on the application page or workspace that includes the panel, the procedure might be slightly different.

To perform a keyword search for users, groups, or roles

1. If the search panel has tabs, select the **Keyword** tab.
2. In the **Search For** field, select whether you want to search for **Users**, **Groups**, or **Roles**.
3. If the **Directory** field is available, select the directory service in which you want to search for users/groups/roles or select **Any Directory** to search in all configured directory services.
4. In the **Keywords** field, type the keywords that you want to use for your search. For information about what you can specify, see ["Keyword Searches" on page 94](#).
5. Click **Search**.

My webMethods displays matching users/groups/roles in the **Available** list in the panel.

6. Select the users/groups/roles by moving them to the **Selected** list.
7. Click **Add**.

Advanced Searches

If the search panel includes an **Advanced** tab, you can use filters for your search. When you initiate a search, you select whether you want to search for users or groups and then specify one or more filters. You cannot perform an advanced search for roles.

A filter allows you to specify a field to use for the search and a string value to use for matching. The **Advanced** tab of the search panel has a **Field Names** list that contains the field names you can use. My webMethods uses Principal Attribute Providers to generate the list of field names. In the list, bold items identify the name of the Principal Attribute Provider with the selections generated from that provider underneath.

The field names in the list can differ based on the webMethods components that are installed. Additionally, developers at your site can create custom Principal Attribute Providers that can supply field names for the list.

For each filter, when you select a field, you also specify a string value. A user or group is a match if the field value for that user or group contains the string value that you specify. The search is case-insensitive.

My webMethods performs an AND operation on the filters you specify. In other words, all filters must match for My webMethods to include a user or group in the search results.

Performing an Advanced Search for Users or Groups

Use the following procedure to perform an advanced search for users or groups. Based on the application page or workspace that includes the search panel, the advanced search might not be available. When an advanced search is available, the search panel includes an **Advanced** tab.

To perform an advanced search for users or groups

1. In the search panel, select the **Advanced** tab.
2. In the **Search For** field, select whether you want to search for **Users** or **Groups**.
3. If the **Directory** field is available, select the directory service in which you want to search for users or groups, or select **Any Directory** to search in all configured directory services.
4. In the **Filters** section of the panel, specify one or more filters. For each filter, perform the following steps. For more information about filters, see ["Advanced Searches" on page 96](#).
 - a. Select a field name that you want to use for the search from the **Field Name** list.
 - b. In the **Value** field, type a string contained in the field value of matching users or groups.
 - c. If you want to add another filter, click **+ Add** and repeat the steps to add a filter.

5. Click **Search**.

My webMethods displays matching users or groups in the **Available** list in the panel.

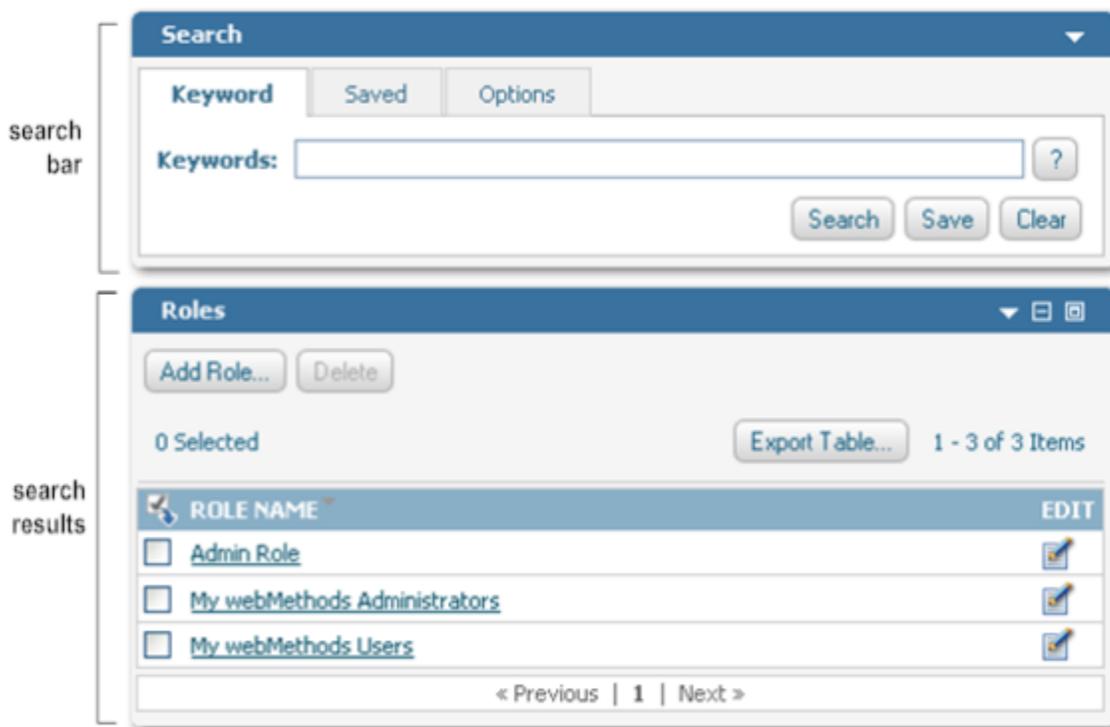
6. Select the users or groups by moving them to the **Selected** list.
7. Click **Add**.

8 Searching for Data

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About Searching for Data

My webMethods has a standard search panel that is included in many application pages to allow you to search for various types of data, for example, process instances, KPIs, etc. In My webMethods the search panels for searching for data do have some slight differences based on the context of the search. The following shows a representative sample of a panel used for searching data.



The two main areas of the search panel are the search bar and the search results.

Area of the page	Description
search bar	You use the search bar to define the criteria My webMethods is to use to search for information. You can also use it to specify options that are specific to the page; for example, you can set an option to have My webMethods automatically execute a saved search when you access the page.
search results	My webMethods displays the results of the search in the search results area, which is below the search panel. The search results are in either a standard-format table or in a tree format.

The following table describes the types of searches you can perform, the tab of the search panel that you use to perform the search, and when the type of search is available for your use.

Type of Search	Description	Search Panel Tab	Availability
keyword	<p>Search for data that contains the keywords and/or exact phrases that you specify.</p> <p>For instructions on how to perform a keyword search, see "Keyword Searches" on page 102</p>	Keyword	When the keyword searching is available depends on the data being searched.
basic	<p>Search using basic search criteria when a keyword search is not available.</p>	Basic	Whether basic searching is available depends on the data being searched.
advanced	<p>Search using keywords and exact phrases along with additional search criteria to produce a detailed search for specific information.</p> <p>For more information, see "Basic and Advanced Searches" on page 104.</p>	Advanced	Advanced searching is only present when the data being searched warrants detailed search criteria for specific information.
saved	<p>You can re-execute searches by saving the criteria for a search. When you save a search, you provide a name for the search criteria. Then when you want to re-execute the search, you select the criteria by the name you assigned it. You can save and re-execute keyword and advanced searches.</p> <p>For instructions on how to save search criteria and</p>	Saved	Re-executing saved searches is always available from the search panel.

Type of Search	Description	Search Panel Tab	Availability
	re-execute searches, see "Saving Your Search" on page 105		

You can set default search options for each My webMethods page that has a search panel. For example, you can set the tab of the search panel that you want My webMethods to display when it displays the My webMethods page and whether you want My webMethods to automatically execute a search when it displays the My webMethods page. For more information, see ["Setting Search Options for a My webMethods Page" on page 107](#).

My webMethods displays the results of your search in either a standard-format table or a tree format. You can customize the display of the search results, for example, you can select the columns you want included in the display. For more information about display options and a description of standard-format table and tree format, see ["Defining How My webMethods Displays Search Results" on page 108](#).

You can take actions against the items in the search result. For example, if your search was for logged services data, from the search results, you might resubmit a service. For more information, see ["Working with Search Results" on page 111](#).

Keyword Searches

Use a *keyword search* to locate entries that contain the keywords and/or exact phrases that you specify.

When searching for keywords, My webMethods searches across one or more fields. To determine the fields that My webMethods searches, see ["Determining the Fields that Keywords are Searched Against" on page 103](#). Keyword searches are *not* case sensitive.

You can use the following special characters in your keywords:

- **Embed an asterisk (*) any place within a keyword to match multiple characters.** The asterisk functions as a wildcard character. For example, if you want to locate all entries that contain the letter "b" and "c" with any number of characters between, type `b*c` as the keyword.
- **Enclose a keyword in quotations (" ") to match an exact phrase.** For example, if you want to locate all entries that contain the phrase "123 Main Street", type `"123 Main Street"`. Note that search for exact phrases is case-insensitive.

My webMethods performs an AND operation on the keywords you specify. In other words, all keywords that you specify must be present for My webMethods to include an entry in the search results. Additionally, My webMethods searches as if you had enclosed each keyword within asterisks. For example, if you specify the keyword `bbb`, My webMethods searches as if you specified `*bbb*` and returns entries that:

- Are equal to the keyword itself, for example, 'man' returns 'man'
- Start with the keyword, for example, 'man" returns 'manual' and "manufacturer'
- End with the keyword, for example, 'man' returns 'roman' and "snowman'
- Have the keyword embedded, for example, 'man' returns 'romantic' and 'adamant'

My webMethods does not take the order in which you specify keywords into consideration. It returns entries regardless of the order in which the keywords occur.

If you do not specify any keywords, My webMethods returns all entries in the search results up to the defined maximum results allowed. The defined maximum number of search results for a keyword search is set by My webMethods and is typically 200 results. If you want to define the maximum number of results, use the **Max Results** or **No Maximum** fields on the **Options** tab. For more information, see "[Setting Search Options for a My webMethods Page](#)" on page 107.

Note: My webMethods searches across a variety of data sources and databases. Some of the data sources and databases do not allow searches that contain certain non-alphanumeric characters. If you specify non-alphanumeric characters in a keyword and the data source or database does not support searching with those characters, rather than issuing an error and requesting you retype your keywords, My webMethods continues with the search. However, My webMethods will replace the non-supported character with a wildcard character that matches a single character. As a result, your search results might include additional entries that do not exactly match the search criteria you specified.

Determining the Fields that Keywords are Searched Against

The fields against which My webMethods matches keywords is different based on the page you are viewing. Use the  **Keyword Search Help** to determine the fields that My webMethods will use to find matching entries.

To determine the fields My webMethods searches against

- Click or rest your mouse pointer on the  **Keyword Search Help** icon. My webMethods displays text that lists the fields that it will search against.

Performing a Keyword Search for Data

Use the following procedure to perform a keyword search for data.

To perform a keyword search for data

1. In the search panel, click the **Keyword** tab.

2. In the text box, type the keywords that you want to use for your search. For information about what you can specify, see ["Keyword Searches" on page 102](#).
3. Click **Search** to initiate the search.

My webMethods displays the results. For more information, see ["Defining How My webMethods Displays Search Results" on page 108](#) and ["Working with Search Results" on page 111](#).

Tip: If you will need to perform this search again in the future, you can save and name the search criteria. Then to re-execute the search, you simply need to select the search criteria that you want to execute. For more information, see ["Saving Your Search" on page 105](#).

Basic and Advanced Searches

If the search panel includes a **Basic** or **Advanced** tab, you can perform these types of searches. A basic search is typically available in place of a keyword search. An advanced search is typically available when a keyword search is available and it provides additional search criteria to allow you to perform a detailed search for specific information.

The search criteria fields available for basic and advanced searches vary because they include fields specific to the page you are viewing. For example, assume My webMethods is displaying the monitoring Process Instances page, which displays information about process instances. The **Advanced** tab on the Process Instances page includes fields to allow you to search for specific process instances; for example, it includes a field that you can use to locate process instances that are based on a specific process model and a field that you can use to locate process instances that have a specific status (for example, completed status).

Although the search criteria on an **Advanced** tab is specific to the page you are viewing, one field that is often included on the **Advanced** tab is a field to specify a time period, for example, a date and time range to restrict the search. Typically, this criterion is called the **Range** search criterion. The table below provides information about how the **Range** search criterion typically functions.

Criteria	Description
Range	<p>If the data that My webMethods is to search has a time aspect associated with it, the Range list is available to restrict the search within a specified time period.</p> <p>The Range list contains:</p> <ul style="list-style-type: none"> ■ Several options that allow you to select a relative time period (for example, Today, Last 7 days, Last Month)

Criteria	Description
	<ul style="list-style-type: none"> ■ Custom option that allows you to specify an exact time period. When you select Custom, you must also fill in the Start Date, End Date, and Times fields to specify the exact time period. <p>Important: If you use the Custom option to specify an exact time period, My webMethods returns data within the exact time period that you specify. If you add the search results to a workspace, the data added will be static; that is the data displayed will always be for the exact time period that you specified. If you want the data to be dynamic, use one of the relative time period options (for example, Last 7 days). For more information, see "Adding Search Results to a Workspace" on page 113.</p>

The procedure for performing a basic or advanced search varies based on the page you are viewing. See the appropriate guide that contains information about the task you are using.

My webMethods returns all entries in the search results up to the defined maximum results allowed. The defined maximum number of search results for a search is set by My webMethods and is typically 200 results. If you want to define the maximum number of results, use the **Max Results** or **No Maximum** fields on the **Options** tab. For more information, see ["Setting Search Options for a My webMethods Page" on page 107](#).

My webMethods displays the search results in a table format. For more information, see ["Defining How My webMethods Displays Search Results" on page 108](#) and ["Working with Search Results" on page 111](#).

Tip: If you will need to perform this search again in the future, you can save and name the search criteria. Then to re-execute the search, you simply need to select the search criteria that you want to execute. For more information, see ["Saving Your Search" on page 105](#).

Saving Your Search

If you will frequently need to perform the same search, you have the option of saving your search query. Saving a search query is especially useful when performing advanced searches that you have constructed with multiple search criteria or search filters. After you save a search, rather than entering the same search criteria each time you want to execute the search, you can simply select a saved search and re-execute it. You can save keyword and advanced searches.

Tip: As an alternative to or in addition to saving a query, if you want immediate access to your search results, add the results to a workspace. Each time you display the workspace, the search results will be available. For more information, see ["Adding Search Results to a Workspace" on page 113](#).

To save search criteria that you want to re-execute in the future

1. Perform the search that you want to save. For more information about performing a search, see one of the following:
 - ["Performing a Keyword Search for Data" on page 103](#)
 - ["Basic and Advanced Searches" on page 104](#)
2. Click **Save**. My webMethods displays the Save Search dialog box.
3. In the **Search Name** field, type the name you want to assign to the search.
4. Click **OK**.

Re-executing a Saved Search

Perform the following procedure to re-execute a search that you previously saved.

To re-execute a saved search

1. Click the **Saved** tab.
2. Select the search you want to re-execute from the **Saved Search** list.

Tip: If you are unsure of the search criteria for the selected search, click **Details**. My webMethods displays the saved search criteria.

3. After selecting the search you want to re-execute, click **Search**.

Modifying a Saved Search

You can modify the search criteria for a saved search and re-save the search to keep your modifications.

To modify the search criteria for a saved search

1. Click the **Saved** tab.
2. Select the search you want to re-execute from the **Saved Search** list.
3. Click **Details**. My webMethods displays all search criteria including both:
 - Search fields that you specified when you saved the search so that you can change them if necessary. My webMethods displays your current settings in these search fields.
 - Search fields that you did not previously set, but might want to set when changing your search criteria.
4. Make your changes to the search criteria.
5. To save your changes, click **Save**.

Deleting a Saved Search

If you no longer need a saved search, you can delete it.

To delete a saved search

1. Click the **Saved** tab.
2. Select the search you want to delete from the **Saved Search** list.

Tip: If you are unsure of the search criteria for the selected search, click **Details**. My webMethods displays the saved search criteria.

3. After selecting the search you want to delete, click **Delete**.

Setting Search Options for a My webMethods Page

For each My webMethods page that has a search panel, you can define search options that apply specifically to that page. These search options can include:

- The search panel tab (for example, **Keyword** or **Advanced**) you want My webMethods to display by default when you initially access the My webMethods page
- Whether you want My webMethods to automatically execute a search when you initially access the My webMethods page, and if so, the saved search you want My webMethods to execute
- The maximum number of search results that you want My webMethods to retrieve before stopping execution of a search

To set search options for a My webMethods page

1. Access the My webMethods page for which you want to set search options.
2. Click the **Options** tab.
3. To define the search panel tab you want My webMethods to display when you initially access the My webMethods page, use the **Search Tab** field. Select one of the following:

Selection...	Description
Keyword	My webMethods displays the Keyword tab.
Basic	My webMethods displays the Basic tab.
Advanced	My webMethods displays the Advanced tab.
Saved	My webMethods displays the Saved tab.

Selection...	Description
Saved - Details	My webMethods displays the Saved tab with the fields that show the details about the saved search criteria displayed.

4. To select a saved search to load, and optionally execute, use the **Selected Saved Search** field and the **Run selected saved search when window is displayed** check box:
 - a. Use the **Selected Saved Search** field to identify a saved search you want *loaded* when you initially access the My webMethods page.

If you do not select the **Run selected saved search when window is displayed** check box, which is described in the step below, My webMethods does not automatically execute the search when you access the My webMethods page; it will execute the search when you click **Search**. If you set the **Search Tab** field to **Saved** or **Saved - Details**, when you initially access this My webMethods page, My webMethods displays the saved search that you select on this tab.

If you do not select a saved search in the **Selected Saved Search** field, My webMethods will not load nor execute a search when you initially access the page.
 - b. If you want My webMethods to *execute* the saved search that you selected in the **Selected Saved Search** field, select the **Run selected saved search when window is displayed** check box. When you select this check box, My webMethods automatically executes the selected saved search when you access the My webMethods page and displays its results, regardless of your setting in the **Search Tab** field.
5. To define the maximum number of search results that you want My webMethods to retrieve before it stops execution of a search, use the **Max Results** field or **No Maximum** check box.

To define a maximum number of search results	Type a number in the Max Results field. Use Max Results if you are only interested in the most recent information. By setting a limit, your searches will run more quickly and you will receive your search results faster.
---	---

If you want to always view all search results	Select the No Maximum check box. When you select the No Maximum check box, your searches can potentially be long running, and you might have to wait before My webMethods displays your search results.
--	---

6. Click **Save** to save your search options.

Defining How My webMethods Displays Search Results

My webMethods displays search results in a table format. The following table lists the possible display options that might be available for you to use for search results

and where you can find more information about the display option. Whether display options are available at all and which options you can use depend on the page that My webMethods is displaying.

Display Option	For more information, see
<p>Sort order of search results</p> <ul style="list-style-type: none"> ■ Define the default sort order for search results. ■ Re-sort search results after My webMethods initially displays the results. 	<p>"Sorting the Search Results" on page 109</p>
<p>Number of search results rows</p> <ul style="list-style-type: none"> ■ Define the number of rows to use for displaying search results. 	<p>"Defining the Number of Search Results Rows to Display Per Page" on page 110</p>
<p>Columns displayed</p> <ul style="list-style-type: none"> ■ Define the columns to use in the search results and the order in which the columns appear. 	<p>"Setting the Columns to Display and Their Display Order" on page 110</p>

Sorting the Search Results

For each My webMethods page that contains a search panel, you can sometimes define a default sort order that My webMethods uses when displaying search results. The default applies specifically to that page. Whether you can specify a sort order depends on the page. You can determine whether you can set a sort order by the presence of absence of the sort fields described in the procedure below.

After My webMethods displays search results in your selected default sort order, you can still re-sort the search results.

To set the default sort order for search results on a specific a My webMethods page

1. Access the My webMethods page for which you want to set display options.
2. In the search results panel window, click **▼ Menu** and select **Properties**.
3. Click the **Preferences** tab.
4. In the **Sort By** field, select the column name that you want to use to sort the search results.
5. For **Sort Order** select either **Ascending** or **Descending** to specify the sort order.
6. Click **Apply**.

Resorting the Search Results

To re-sort the search results

- To re-sort the search results, click ▾ in the column heading of the column that you want to use to sort the search results. My webMethods indicates the current sort order by displaying ▲ or ▼ next to the column header of the column that is currently being used for sorting:
 - ▲ indicates the results are sorted in ascending order
 - ▼ indicates the results are sorted in descending order.

For example, if your search results contain a column labeled **PROCESS** and you want to sort the data alphabetically based on the process name, click ▾ in the **PROCESS** column heading.

Defining the Number of Search Results Rows to Display Per Page

You can set the number of rows that My webMethods displays on each page of the search results. For example, if a search produces 18 results and you define the number of rows to display per page as 10, My webMethods displays your results in 2 pages, 10 results on the first page and the remaining 8 results on the second.

Tip: If you want to take the same action against all results from a search, set the number of rows to show all. Then, you can use  **Select All** to select all items in the search results, allowing you to act on all items at one time. For example, you might want to do this if you need to perform a bulk delete of several items. For more information about acting on search results, see ["Taking Action Against Items in the Search Results" on page 111](#).

To define the number of search results rows to display per page

1. Access the My webMethods page for which you want to set display options.
2. In the search results panel window, click ▾ **Menu** and select **Properties**.
3. Click the **Preferences** tab.
4. In the **Number of Rows to Display** field, select the number of rows you want My webMethods to use when displaying search results on this My webMethods page.
5. Click **Apply**.

Setting the Columns to Display and Their Display Order

For each My webMethods page, you can customize the columns that My webMethods displays in the search results. Additionally, you can specify the order in which you want the columns to appear.

To customize the display of columns for the search results

1. Access the My webMethods page for which you want to set display options.
2. In the search results panel window, click **▼ Menu** and select **Properties**.
3. Click the **Preferences** tab.
4. To specify the columns that you want included, in the **Column Display** section of the panel, move the columns to the **Selected** box.
5. To specify the order in which My webMethods displays the columns in the search results, move the column names up and/or down in the list.
6. Click **Apply** to save your column display changes.

Working with Search Results

The following table lists how you can use the search results.

Task	For more information, see...
Perform actions against items returned in the search results. For example, edit an entry.	"Taking Action Against Items in the Search Results" on page 111
Add the search results to a workspace.	"Adding Search Results to a Workspace" on page 113
Export the search results to a comma-delimited text file (.csv file).	"Exporting Search Results to a .csv File" on page 113

Taking Action Against Items in the Search Results

Typically, you will be able to perform actions against items listed in the search results. Actions that might be available can fall into one of three categories:

- Actions against multiple items in the search results (for example, deleting one or more items)
- Action to add an item
- Actions against a single item in the search result (for example, editing an item or displaying details about an item)

For information about the actions available in a specific search panel and more details about how to perform the actions, see the appropriate guide that is associated with the task.

Taking Action Against Multiple Items in the Search Results

If you can take actions against multiple entries in the search results, My webMethods displays a function bar at the top of the search results. The function bar contains a button for each action you can perform. For example, on the **Monitoring > Business > Process Instances** page, there is a **Resubmit** button that allows you to resubmit one or more process instances. In the search results, you mark each process instance that you want to resubmit, and then click **Resubmit**.

To act against multiple items in the search results

1. Select the items by selecting their check boxes.

To select all items on the currently displayed page of the search results, click  **Select All**. To clear all items that you have selected on the currently displayed page, click  **Select None**.

2. After selecting the items you want to act on, click the appropriate button (for example, **Delete**) in the function bar.

Tip: If you want to take the same action against all results from a search, first update the number of rows to display in the search results to show all search results on a single page. Then, you can use  **Select All** to select all items in the search results, allowing you to act on all items at one time. For information about setting your preference, see "[Defining the Number of Search Results Rows to Display Per Page](#)" on page 110.

Adding Items

If you can add an item, My webMethods displays a button you can use to add items in the function bar. For example, on the **Monitoring > System-Wide > Rules > Rule List** page, there is a **Create Rule** button. To add a new rule, click **Create Rule**.

To add an item

- Click the add button, which is typically labeled **Add** or **Create**.

If My webMethods displays additional windows, supply the requested information to describe the new item you are adding.

Taking Action Against a Single Item in the Search Results

If you can take actions against individual items in the search results, My webMethods displays action icons in the rows for items. The action icons are displayed on the right unless you re-ordered the column displays to place them in a different location.

Two common action icons are the  **Edit** icon that you use to edit information for an item in the search results and the  **Detail** icon that you use to display detail information for an item in the search results.

To act against a single item in the search results

- Click on the appropriate icon for the item you want to act on.

Adding Search Results to a Workspace

You can add the search results to a workspace.

Important: If your search includes a criterion that specifies an exact time period, for example using the **Custom** selection of the **Range** search criterion, when you add the search results to a workspace, the data is static; that is the data displayed will always be for the exact time period that you specified. For more information about the **Range** search criteria, see "[Basic and Advanced Searches](#)" on page 104.

To add search results to a workspace

1. In the title bar of the window containing the search results that you want to add to the workspace, click **Tools**.
2. Select **Add to Workspace**.
3. In the Add to Workspace window, search for the workspace to which you want to add the search results.
 - a. In the **Keyword** field, type keywords that My webMethods uses to search for workspaces. My webMethods matches the keywords you specify against workspace names and keywords assigned to the workspace.
 - b. In the **Search In** field, select the folders in which to look for a matching workspace.
 - c. Indicate whether you want to search for only folders for which you are the owner or also those that other users have shared with you.
 - To search only your own workspaces, select the **Include only workspaces I own** check box.
 - To search all workspaces to which you have access, clear the **Include only workspaces I own** check box.
 - d. Click **Search**.
4. In the Results panel, select the workspace(s) to which you want to add the search results.
5. Click **Add**.

Exporting Search Results to a .csv File

You can export search results to a comma-delimited text file (.csv file) if the search results panel includes the **Export Table** function.

After exporting search results to a .csv file, you can then import the .csv file into Microsoft Excel, Microsoft Access, or any other application that accepts the .csv file format.

To export search results

1. Click **Export Table**, which is located in the top right of the search results.
2. From the **Character Encoding** list, select the character encoding to use.
3. Click **Export**.
4. Click **Save** to indicate you want to save the search results to a file.
5. In the Save As dialog box, browse to the location where you want to save the .csv file.
6. Click **Save**.

Note: To open a .csv file saved with UTF-16 LE encoding in Excel 2000 or earlier, you will need to import the file using **Data > Get External Data > Import Text File** and follow the instructions in the Import Wizard.

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