Working with webMethods Business Console

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About this Guide

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

Both user-oriented and administrator-oriented features are documented here; however, Business Console features are available to users based on the privileges of their role.

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

- General terminology and usage of My webMethods. For more information, see the PDF publication *Working with My webMethods*.
- Working with tasks in the My webMethods environment. For more information about conceptual and procedural information, see the PDF publication *webMethods Task Engine User's Guide*.

Document Conventions

Convention	Description
Bold	Identifies elements on a screen.
Narrowfont	Identifies storage locations for services on webMethods Integration Server, using the convention *folder.subfolder:service* .
UPPERCASE	Identifies keyboard keys. Keys you must press simultaneously are joined with a plus sign (+).
Italic	Identifies variables for which you must supply values specific to your own situation or environment. Identifies new terms the first time they occur in the text.
`Monospace font`	Identifies text you must type or messages displayed by the system.
{ }	Indicates a set of choices from which you must choose one. Type only the information inside the curly braces. Do not type the { } symbols.

Convention	Description
|	Separates two mutually exclusive choices in a syntax line. Type one of these choices. Do not type the | symbol.
[ ]	Indicates one or more options. Type only the information inside the square brackets. Do not type the [ ] symbols.
...	Indicates that you can type multiple options of the same type. Type only the information. Do not type the ellipsis (...).

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

1 Overview

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

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

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

Business Console Features

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

In Business Console, you can:

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

Administrative Features

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

To...	Use this menu item...	Do...
Configure the Integration Server and Task Engine to which Business Console must connect	**Administration**	See "Configuring Integration Server and My webMethods Server for Business Console" on page 20.
Configure a Twitter account for Business Console	**Administration**	See "Configuring Business Console with Twitter" on page 21.

To...	Use this menu item...	Do...
Configure the rating for user endorsement	**Administration**	Set the value for **Maximum User Endorsement Rating**. See "Configuring User Endorsement Rating" on page 23.
Display or hide endorsements in Task Detail page and Task Experts panel	**Administration**	Use the **Do Not Show Endorsements** option. See "Configuring User Endorsement Rating" on page 23.
Manage task types using My webMethods	**Task Administration**	See "Managing Task Types Using My webMethods" on page 23.
Configure group tasks	**Administration**	See "Configuring Group Tasks" on page 23.
Customize the user interface	**Customize Business Console**	See "Customizing Business Console" on page 24.
Program user endorsement		Use the web services available for business process guidance. See "Configuring User Endorsement Rating" on page 23 and "Using Services for Business Process Guidance" on page 61.

User Features

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

To...	Navigate to...	Do...
View the unaccepted tasks	Masthead	Click .
View the tasks expiring today	Masthead	Click .

To...	Navigate to...	Do...
Filter and view process types and task types	**What's Happening Now > Process Stream**	Use the filter field to search and view the process types and task types. By default, you view all the process types and task types.
View process instances grouped by status (Process badges)	**What's Happening Now > Process Stream**	1. Click on the process bar to view the process badges. 2. Click on the process badge pertaining to the process instances you want to view.
Filter process instances	**What's Happening Now > Process Stream**	1. Click on the process bar to view the process badges. 2. Click on the process badge pertaining to the process instances you want to view. 3. Search and view the process instances.
View process instance details	**What's Happening Now > Process Stream**	1. Click on the process bar to view the process badges. 2. Click on the process badge pertaining to the process instances you want to view. 3. Search and view the process instances. 4. Click Process Detail corresponding to the process instance, and view the process instance details in My webMethods.

To...	Navigate to...	Do...
Check if a task type is enabled for: ■ Starting ■ Collaboration	**What's Happening Now > Process Stream**	Check the status on the task type bar.
View task types belonging to a process type	**What's Happening Now > Process Stream**	Click to expand the process type bar.
View task instances grouped by task type	**What's Happening Now > Process Stream**	Click to expand the task type bar.
Create and start a task instantly	**Instant Task** tab on the left margin	See "Creating and Starting a Task Instantly" on page 38.
View task instances grouped by saved search (Keylinks)	**What's Happening Now > Process Stream**	Click on the task bar to view the customized keylinks.
Customize task keylinks (using saved searches)	**What's Happening Now > Process Stream**	Select the **Customize Keylinks** option on the task type bar and configure the keylinks. See "Customizing Task Keylinks" on page 30.
Search for tasks in task list	**What's Happening Now > Process Stream**	1. Click to expand the task type bar. 2. Use the search field to search tasks. See "Searching for Task Instances" on page 42.
Create and use group tasks	**What's Happening Now > Process Stream**	See "Using Group Tasks" on page 31.
Configure task instances	**What's Happening Now > Process Stream > Task List**	Click **Settings.**

To...	Navigate to...	Do...
View task instance details such as tags, attachments, comments, experts, and audit information of a task	**What's Happening Now > Process Stream > Task List**	Click the task ID link of the task instance and select the **Task Detail** tab.
View business data of task instance	**What's Happening Now > Process Stream > Task List**	Click the task ID link of the task instance and select the **Business Data** tab.
Change task priority	**What's Happening Now > Process Stream > Task List > Task Detail**	Select the priority from the drop-down list.
Tag tasks	**What's Happening Now > Process Stream > Task List > Task Detail**	Type the new tag in the **Tags** field.
Create child task	**What's Happening Now > Process Stream > Task List** or **What's Happening Now > Activity Stream**	Click **Create Child Task** option.
Add comments to a task	**What's Happening Now > Process Stream > Task List > Task Detail** or **What's Happening Now > Activity Stream**	1. Type the comment for the task. 2. Click **Post**.
Add attachments to a task	**What's Happening Now > Process Stream > Task List > Task Detail** or **What's Happening Now > Activity Stream**	1. Select the task instance in **Process Stream**, and type your comment for the task. 2. Click **Add Attachments**. 3. Click **Attach**.
Reply to a comment, email the user who commented for a task, or delete a comment	**What's Happening Now > Activity Stream**	See "Task management capabilities available only in Activity Stream" on page 52.

To...	Navigate to...	Do...
Endorse users for a task	**What's Happening Now > Process Stream> Task List > Task Detail** or	See "Configuring User Endorsement Rating" on page 23 and "Using Services for Business Process Guidance" on page 61.
Visualize task data and analyze task activity	**What's Happening Now > Task Activity**	See "Task Charting and Analyzing Task Activities" on page 49.
View user profile, roles, and group memberships	**What's Happening Now > Get Connected** or **Profile** option in the administrative menu	See "Viewing and Updating Your Profile" on page 16.
Edit user profile	**What's Happening Now > Get Connected** or **Profile** option in the administrative menu	See "Viewing and Updating Your Profile" on page 16.
View and filter trending information related to tasks on social media	**What's Happening Now > Twitter Stream**	See "Viewing Trending Information on Social Media" on page 55.
Network with task experts	**What's Happening Now > Task Experts**	See "Networking with Task Experts" on page 57.
Filter and view tasks, accept tasks, delegate tasks, or remove delegation from tasks in your inbox	**Inbox** tab	See "Managing Your Inbox" on page 59.
Customize task list in Process Stream and Inbox	**What's Happening Now > Process Stream > Task List** or **Inbox > Task List**	Click **Settings** and use the **Configure Columns** option and select the columns to be displayed. You can also include the business data fields to Task List.

To...	Navigate to...	Do...
Specify the landing page	**What's Happening Now > Process Stream > Task List > Task Detail** or **Inbox > Task List**	See "Configuring Landing Page" on page 26. By default, the Home page is the default landing page.

2 Getting Started

Pre-Requisites

Before you begin, make sure that:

- The following products are installed and configured:
    - webMethods Integration Server
    - webMethods Task Engine
    - webMethods Process Engine
    - My webMethods Server
    - webMethods Monitor
    - webMethods Database Component Configurator
- The Task Engine environment is configured. For configuration information, see *webMethods Task Engine User's Guide*.
- You have a user account in My webMethods Server and the privileges to work in the Task Engine environment. See "Users, Roles, and Groups" on page 16.

Users, Roles, and Groups

Business Console access control and management of user, group, and role are performed through My webMethods Server user interface. Business Console features are assigned based on your user account, or your membership in one or more groups or roles in My webMethods Server.

Two categories of Business Console users:

- Administrators
- Other users

Business Console users require functional privileges for Task Engine, and the ACL privileges for Integration Server and Monitor.

Viewing and Updating Your Profile

Business Console uses the user details, groups, and roles configured in My webMethods Server.

To view and update your profile

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

- Use the **Profile** option in the administrative menu.

2. To edit the profile, type the new values in the fields, and click **Save**.
3. To change the profile picture, click **Upload Profile Picture**, and upload the new profile picture.

Opening the Business Console User Interface

Use the following procedure to open the Business Console user interface.

To open the Business Console user interface

1. In your browser, provide the following URL:

   http://*host: port/* business.console

host	The name or IP address of the machine on which My webMethods Server is running.
port	The port used by My webMethods.

2. Enter your My webMethods Server user ID and password.

Logging Out of Business Console

Use the following procedure to log out of Business Console.

To log out of Business Console

1. Navigate to the administrative menu located on the Business Console title bar.
2. Click **Logout**.

3 Administering Business Console

Configuring Integration Server and My webMethods Server for Business Console

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

Specify the values for the following fields in the **Administration** menu option in the administrative menu:

Field	Specify...
Integration Server URL	URL of the Integration Server that Business Console must connect to. For example, `http://localhost:5555`. Make sure that Process Engine is configured in the Integration Server. **Note:** In the URL, if you specify a machine name or IP address, make sure you configure the remote My webMethods Server to allow access to Business Console. See the instructions in "Configure a Remote My webMethods Server to Allow Access to Business Console " on page 21.
Task Engine URL	URL of the Task Engine that Business Console must connect to. For example, `http://localhost:8585`. Make sure you have configured following with the Task Engine: ■ My webMethods Server ■ My webMethods ■ Monitor **Note:** In the URL, if you specify the machine name or IP address, make sure you configure the remote My webMethods Server to allow access to Business Console. See the instructions in "Configure a Remote My webMethods Server to Allow Access to Business Console " on page 21.

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

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

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

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

2. Change the Cross-origin filter to:

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

Configuring Business Console with Twitter

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

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

Fields	Description
Enable	Select this option to enable searching and viewing the task related posts on Twitter.

Fields	Description
Consumer Key, **Consumer Secret**, **Access Token**, and **Access Token Secret**	Provide the corresponding values you obtained from the Twitter website. For registering your Business Console application in the Twitter website and obtaining values for the parameters, see "Creating Twitter Account for Business Console" on page 22.
HTTP Proxy Host, **HTTP Proxy Port**, **HTTP Proxy User**, and **HTTP Proxy Password**	Provide values for these parameters, if you want to configure a proxy server for external network connection.

Creating Twitter Account for Business Console

To enable Business Console to interact with Twitter, Business Console administrator must first create an account in Twitter, and then provide the Twitter settings in the Administration page as specified in "Configuring Business Console with Twitter" on page 21.

To create an account in Twitter

1. Stop My webMethods Server, if it is running.
2. Access the Twitter website to create a new account.
3. Download the VeriSign Class 3 Public Primary Certification Authority - G3.pem certificate as mentioned in the Twitter website to a local directory.
4. Import the VeriSign Class 3 Public Primary Certification Authority - G3.pem certificate to My webMethods Server.
    a. Open command prompt and change directory to *Software AG_directory* \MWS \server\default\config\security.
    b. Use the JVM's keytool command to import the Verisign certificate to the *Software AG_directory* \MWS\server\default\config\security directory as shown below. For information about importing certificates using the keytool command, see the *Administering My webMethods Server* guide.
    ```
    keytool -import -keystore sagdemoca.jks -file <path_to_the_downloaded_VeriSign_certificate
    ```
    c. The command prompts you for the password for the certificate file. Type the password. By default, the password is `changeit`.
    d. When command prompts: `Trust this certificate? [no]:`, type `y`.
5. Start My webMethods Server.

Configuring User Endorsement Rating

Only users with administrator privileges can use the **Administration** menu option in Business Console's administrative menu to enable endorsements and specify a value for the **Maximum User Endorsement Rating** field.

Field	Specifies...
Maximum User Endorsement Rating	The maximum endorsement rating you can grant to another user. The default value is `1`.
Do Not Show Endorsements	Whether the endorsements must be displayed in the Task Experts panel and the Task Detail page. By default, the Task Experts panel and the Task Detail page display the endorsements.

Managing Task Types Using My webMethods

Only users with administrator privileges can use the **Task Administration** menu option in Business Console's administrative menu to manage, modify, and delete task types using the Task Engine Administration page in My webMethods.

For information about administering task types, see *webMethods Task Engine User's Guide*.

Configuring Group Tasks

Only users with administrator privileges can use the Administration menu option in Business Console to configure the group tasks.

Configure group tasks using the settings listed in the table below. For information about creating group tasks with or without templates, see "Using Group Tasks" on page 31.

Field	Specifies...
Maximum Number of Rows Per Group Task Template	The maximum number of rows you can add to a group task template. **Tip:** If the number of child tasks that you want to add to a group task is more than the maximum number of rows allowed in the group task template, you can add the additional child tasks to the group

Field	Specifies...
	task by using the same template and the same parent task ID.
Allow Tags for Group Task	Whether or not you can use tags for group tasks. If you have used tags, you can search for group tasks by using the tags, and view the parent task of the group task that has the tag matching the search criteria. You can view the tag of a group task in the task detail page of the group task.
Default Group Task Tag Name	The default tag for group tasks.
Group Task Polling Enabled	Whether or not to poll Task Engine for the status of group tasks. If you have enabled group task polling, when you start a group task, Business Console polls the Task Engine in regular intervals and displays the updated status of the start operation in the Group Tasks dialog. If you want to stop polling that has been going on for a long time, click at the end of the polling progress bar. You can disable group task polling to avoid frequent polling of Task Engine. If you have you have disabled **Group Task Polling Enabled**, Refresh polling icon is available on the Group Tasks dialog for starting manual polling.

Customizing Business Console

You can customize the Business Console user interface as required by your company. Any Business Console user can customize the color theme, but only a user with administrative privileges can customize the logo, title, landing page, and the masthead.

To customize...	Perform these steps...
Logo	1. Select the **Customize Business Console** menu option from the Administrative menu. 2. Select **Logo** from the menu options on the Customize Business Console page.

To customize...	Perform these steps...
	3. Click **Select Logo** to upload the logo. The size of the image must be 140 X 40 pixels and the image file can be in .JPG or .PNG format. The image you upload will be displayed on the top left corner of the Business Console masthead. 4. Click **Reset to Default**, if you want to retain the default logo.
Masthead	1. Select the **Customize Business Console** menu option from the Administrative menu. 2. Select **Masthead** from the menu options on the Customize Business Console page. 3. Use the color pickers to select the color for the masthead. 4. Click **Preview** to view the changes. 5. Click **Reset to Defaults**, if you want to retain the default colors. 6. Click **Apply** to apply the new colors to the masthead.
Title	1. Select the **Customize Business Console** menu option from the Administrative menu. 2. Select **Title** from the menu options on the Customize Business Console page. 3. Type the new title in the text field. Maximum length of the title is 50 characters. 4. Click **Reset to Defaults**, if you want to retain the default title. 5. Click **Apply** to use the new title.
Color theme	1. Select the **Customize Business Console** menu option from the Administrative menu. 2. Select **Color Theme** from the menu options on the Customize Business Console page. 3. Select a theme and click **Apply** to apply the new theme to the masthead.
Default landing page	1. In the **Process Stream** panel or in the **Inbox**, select the task detail page that you want to make as the default landing page. 2. From the **Actions** menu, select **Set This As Landing Page**.

To customize...	Perform these steps...
	3. To reset the default landing page to the **What's Happening Now** tab, perform these steps: a. Select the **Administration** menu option from the Administrative menu. b. Clear the **Default Landing Page** field.

Configuring Landing Page

When you first login to Business Console, the Home page is the default landing page. You can configure any of these pages or a task detail page as the landing page:

- **Analytics**
- **Home** (Default)
- **My Inbox**
- **Processes**

To configure the landing page

1. To configure the Analytics, Home, My Inbox, or Processes page as the landing page, perform these steps:
   a. Select the **Administration** menu option from the Administrative menu.
   b. In the **Default Landing Page** drop-down list, select the page you want to make as the landing page.
2. To configure a task detail page as the landing page, perform these steps:
   a. In the Process Stream panel or in the Inbox tab, select the task detail page that you want to make as the landing page.
   b. Select **Set This As Landing Page** from the **Actions** menu.
3. To reset the landing page to Home page, perform these steps:
   a. Select the **Administration** menu option from the Administrative menu.
   b. Click **Clear** next to the **Default Landing Page URL** field.

4 Administering and Monitoring Tasks

In the **What's Happening Now** tab, you can view and monitor the current status and activities of the task instances published to My webMethods Server.

In this panel...	You can...
Process Stream	Manage the business process types (process models) and task types.
Task Activity Charting	View task charting
Activity Stream	View and perform task activities such as posting comments, adding attachments, creating child tasks, and configuring task actions.
Get Connected	View or edit your profile, and view your roles and group memberships.
Twitter Stream	Search the social networking site for posts related to your tasks.
Task Experts	Network with the task experts.

Related Topics

Managing Process Types and Task Types

Task Charting and Analyzing Task Activities

Collaborating Task Execution

Viewing Trending Information on Social Media

Networking with Task Experts

5 Managing Process Types and Task Types

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

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

- Process types
- Task types of standalone tasks

Operations You Can Perform Using Process Stream

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

Process Instance Statuses

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

Customizing Task Keylinks

In the Customize Keylinks dialog, for each keylink:

To...	Do...
Change the saved search	Select the saved search from the **Keylink Name** list.
Change the icon	Select an icon from the **Icon** list
Save changes	Select the check box corresponding to the keylink, and click **Save**.

Using Group Tasks

A group task is a defined set of tasks. Group task has a parent task and a set of child tasks belonging to one or more task types. Each child task can be assigned to one or more users. For example, you might want to create a group task for grouping the sub-tasks of a hiring or procurement process.

You can create a group task by using a new group task template or by re-using an existing group task template. For information about configuring group tasks, see "Configuring Group Tasks" on page 23.

The table below lists the group task operations that you can perform and the privileges that you must have for performing the operations.

To...	You need this functional privilege...	See...
Create, update, or delete a group task template	Create Group Task Template	■ "Creating Group Task Templates" on page 32 ■ "Viewing, Updating, or Deleting Group Task Templates" on page 32
Create a group task	Create Group Task	■ "Creating Group Tasks" on page 33 ■ "Viewing and Updating Group Tasks" on page 34
View group task template	Use Public Group Task Template	"Viewing, Updating, or Deleting Group Task

To...	You need this functional privilege...	See...
		Templates" on page 32

Creating Group Task Templates

Group task templates are useful for creating group tasks. You can specify the child tasks and the attributes for each child task either when you create the group task template or when you later update the template.

To create a group task template

1. Select the **Group Tasks** menu option on the task type bar or from the **Actions** menu of a task in the task list.
2. Type the unique name for the group task template in the **Group Task Template Name** field and select whether you want the template to be private or public.

   A private group task template is available only to the user who created it. Public group task templates are available for all users.
3. Provide the attribute values for the parent task and the child tasks. If required, you can change the attribute values of the child tasks after creating the group task template. For information about the group task attributes, see "Group Task Attributes" on page 34.
4. Click to add a child task.
5. Click to remove a child task.
6. Click **Save Group Task Template** and provide an unique name for the group task template.

Viewing, Updating, or Deleting Group Task Templates

After you create a group task template, you can view the template, and edit the template as required.

Except for the group task template name and the access right (public or private), you can update the values of other attributes of the group task template.

To view and update a group task template

1. Select **Group Tasks** menu option on the task type bar or from the **Actions** menu of a task in the task list.
2. Select the template you want to use from the **Saved Group Task Template**.
3. To change the attribute values of the child tasks, edit the attribute values. See "Group Task Attributes" on page 34.

4. Click to add a child task.
5. Click to remove a child task.
6. Click **Update Group Task Template** to save the changes.
7. Click **Delete Group Task Template** to remove the template.

Creating Group Tasks

You can create a group task with or without using a group task template. When you create a group task, you create instances of all the tasks defined in the group task template.

To create a group task

1. Select **Group Tasks** menu option on the task type bar or from the **Actions** menu of a task in the task list.
2. Provide the attribute values for the parent task if it is not already populated.

   If you select the **Group Tasks** menu option from the **Actions** menu in a task list, the task ID of the parent task type will be specified by default.
3. If you want to create a group task by using a saved group task template, click the **Saved Group Task Template** tab and perform the following steps:
   a. Select the template you want to use from the **Saved Group Task Template**.
   b. If required, provide values for all the group task attributes. See "Group Task Attributes" on page 34.

      After creating a group task, you can change the attribute values of the child tasks in the Task Details page.
   c. If you want to remove a child task, click corresponding to the child task.
   d. If you want to add a child task, click .
   e. If you have made any changes to the template, click **Update Group Task Template** to save the changes to the template.
   f. Click **Start Group Task** to create and start the group task.
4. If you want to create a group task without using a saved group template, click the **Create Group Task** tab and perform the following steps:
   a. Type a name for the new group task in the **Group Task Template Name** field.
   b. Provide values for all the group task attributes. If required, you can change the attribute values of the child tasks after creating the group task. See "Group Task Attributes" on page 34.
5. Click **Create Group Task**.

Icon displayed in each child task row helps you identify which child task instances were successfully created.

Viewing and Updating Group Tasks

In the task list, the child tasks are grouped under the parent task of the group task.

To view and update group tasks

1. In the task list of the group task's parent task, expand the parent task to view the child tasks of the group task.
2. Click on the task ID of the parent task or the child tasks to view the task details of the group tasks.
3. Edit a task in the task details page of the parent task or the child task. For information about what operations you can perform on a task, see "Task Operations" on page 39.

Group Task Attributes

The attributes of a group task define the tasks of a group task.

Parent Task Attributes

Attribute	Specifies...
Task Type Name	Name of the parent task type.
Name	Name of the parent task.
Priority	The group task priority.
Expiry Date	Expiry date for the parent task.
Assign	Name of the user to whom the parent task is assigned.
Queue Immediately	Queue the parent task and change status to Active.

Child Task Attributes

Attribute	Specifies...
Task Type Name	Name of the child task type.

Attribute	Specifies...
Name	Name of the child task.
Priority	The priority for the child task.
Expiry Date	Expiry date for the child task.
Assign To	Name of the user to whom the child task is assigned.
Queue Immediately	Queue the child task and change status to Active.

6 Managing Tasks

A Task List displays all the tasks of a task type that you have privileges to view, regardless of the task assignment. The Task List enables you to apply task management actions to selected tasks.

Use the search field to search for tasks and view the results in the task list. The completed tasks are not listed in a Task List, but you can search for the completed tasks. For more information, see "Searching for Task Instances" on page 42.

To apply various task management actions to the tasks in the Task List, a task must have a status of Active, Error, or Suspended. You cannot apply task list management actions to tasks with a status of Canceled, Completed, or Expired. For more information, see "Task Actions" on page 40.

Operations You Can Perform in Task List

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

Creating and Starting a Task Instantly

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

To instantly create and start a task instance

1. Click the **Instant Task** vertical tab on the left margin.
2. Select the task type for the task instance from the drop-down list.
3. Click **Go** to queue a new task instance.
4. Input the values for the new task, if the portlet for start task (or queue task) is defined for the task type.
5. Click **Start Task**.

Configuring Task Instances

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

Task Operations

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

Operation	Perform these steps in the task list...
View the following information pertaining to a task ■ Task details ■ Business data ■ Status ■ Priority ■ Attachments ■ Comments ■ Tags ■ Experts ■ Audit information	Click the task ID link for the task.
Perform actions on a task	Select a action from the **Actions** list. See "Task Actions" on page 40.
Change the priority of a task	1. Click the task ID link for the task. 2. Select the priority for the task (None, Low, Medium, High, Critical) from the **Priority** list.
Endorse users for the task	1. Click the task ID link for the task. 2. In the Task Details tab, Click **Endorse** and provide the endorsement rating for the users.
View or post task comments	1. Click the task ID link for the task.

Operation	Perform these steps in the task list...
	2. View or post comments in the Comments panel.
View or post task attachments	1. Click the task ID link for the task. 2. View or post attachments in the Attachments panel.
View task experts, email tasks experts, or assign a task to a task expert	1. Click the task ID link for the task. 2. In the Task experts panel, select the expert and perform the required action.
Add tags for a task	1. Click the task ID link for the task. 2. In the Task Details tab, type new tags in the **Tags** field.
Set the expiry date for a task	1. Click the task ID link for the task. 2. In the Task Details tab, set the expiry date for the task in the **Expiry Date** field.

Task Priority

You can escalate or change the priority of task instances to any of the following values based on your business requirement:

- None
- 1-Critical
- 2-High
- 3-Medium
- 4-Low

Task Actions

Depending on the access privileges and the current status of the task instance, you can perform these actions on tasks:

Action	Use this action to...
Resume	Resume a suspended task.
Suspend	suspend an active (running) task.
Assign To	Assign a task to one or more users, groups, or roles. The task will appear on the user's My Inbox.
Accept For	Accept a task on behalf of one or more users or roles. The task will appear in each individual user's inbox as an accepted task.
Resubmit	Resubmit an active task. This forces the task data to be re-evaluated regardless of whether or not any of the data has been modified. Note that resubmitting a task can have an effect on task assignments.
Set Status	Change the status of the task. Available settings are Active, Completed, Error, Canceled, and Expired.
Delete	Delete a task from the current process list.
Delegate	Delegate a task to another user.
Remove Delegations	Remove all delegations applied to the task.
Create Child Task	Opens the New Collaboration Task dialog box.
Set This As Landing Page	Set the task details page as the landing page.

Task Status

The task status can be set manually by a user, or automatically by the Task Engine as a result of processing rules.

Task statuses:

Task Status	Description
New	The task is in **New** status only if the queued task is not specified for immediate start. Immediately after a task starts, the status transitions from **New** to **Active**.

Task Status	Description
Active	The task is running normally and is available for user interaction.
Completed	The task is complete. No further work can be done on a task that is completed, other than deleting it.
Error	The task has transitioned to an error condition. No further work can be done on a task that is in Error status, other than deleting it.
Canceled	The task is canceled. No further work can be done on a task that is canceled, other than deleting it.
Suspended	The task is suspended. A suspended task can be resumed or placed back into Active status by a manual user action or as the result of a task event evaluation.
Expired	The task has expired as a result of a manual action by a user or as a result of a task event evaluation.

Searching for Task Instances

Use the search field in the task lists to search for task instances of a task type. In the search field of a task list, you can:

- Provide a task ID and search for a specific task instance.
- Create a search criteria for searching task instances.
- Save and reuse search criteria for searching task instances. For more information, see "Using Saved Searches" on page 42.

Using Saved Searches

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

In Business Console, the functionality to create, modify, delete, and reuse public and private task searches is available in the task lists viewed through the **What's Happening Now** and **Inbox** tabs.

A private saved search is available only to the user who created the saved search. Public saved searches are available to all Task Engine users.

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

Action	Perform these steps...
Create a new saved search	1. Click ▼ in the search field of a task list. 2. Click the **Create New Search** tab. 3. Select the fields and criteria for the search. Click **+** to add more search criteria. Click **-** to remove a search criteria. 4. Click **Save Search**. 5. Provide a name and description for the search criteria. 6. If you want the new search to be available to all users, choose **Public**. By default, the saved searches are private, and available only to user who created the saved search. 7. Click **Save**.
Use a saved search	1. Click ▼ in the search field of a task list. 2. Click the **Saved Searches** tab. 3. Select a saved search from the list. Click **Show Details** to view the search criteria of a saved search. 4. Click **Go**.
Modify a saved search	1. Click ▼ in the search field of a task list. 2. Click the **Saved Searches** tab. 3. Select the saved search that you want to modify. Click **Show Details** to view the search criteria of the saved search. 4. Select the fields and criteria for the search. Click **+** to add more search criteria. Click **-** to remove a search criteria. 5. Click **Update Saved Search**.
Delete a saved search	1. Click ▼ in the search field of a task list. 2. Click the **Saved Searches** tab. 3. Select a saved search that you want to delete. Click **Show Details** to view the search criteria of the saved search. 4. Click **Delete**.

Action	Perform these steps...
Clear a custom search	Click **Clear** on the search field.

7 Endorsing Users

The social guidance feature in Business Console enables you to:

- **View experts** for a task type. You can view the list of experts for a task type in the Task List page and in the **Task Experts** panel.
- **Network with task experts** and improve task execution. You can email task experts or assign task instances to task experts. For more information, see "Networking with Task Experts" on page 57.
- **Endorse users** based on their task expertise. When a user is endorsed for a task, the endorsement rating that the user gets is added to all the tags associated with the task for the user. For information about how user endorsements can be done, see "Endorsement Methods" on page 46.

The social endorsement feature in Business Console is governed by the social guidance properties of the Task Engine available in My webMethods Server. See "Endorsement Properties in My webMethods Server " on page 47.

Use the **Do Not Show Endorsements** option in the Administration page to display or hide endorsements in the Task Detail pages and the Task Experts panel. For more information, see "Configuring User Endorsement Rating" on page 23.

Endorsement Methods

Business Console identifies and tracks tasks experts of a task type based on the points a user receives for task instances.

User endorsements are possible through any of the following methods only if the `task.socialbpm.enabled` system property of the Task Engine is set to `1`. For information about property setting, see "Endorsement Properties in My webMethods Server " on page 47.

- **Automatic user endorsement**. Task Engine endorses users automatically when a user completes a task.

  Use `task.socialbpm.default.systemendorse.enabled` and `task.socialbpm.endorsement.rating` properties to enable automatic user endorsement.

- **Manual user endorsement**. Other users endorse task experts using the **Endorse** option in the Task Detail page in Business Console.
  - Use the `task.socialbpm.enabled` property to enable user endorsement.
  - Use the **Maximum User Endorsement Rating** parameter in Business Consoleto define the maximum endorsement rating a user can grant to another user.

    For example, if a user gets four stars, and **Maximum User Endorsement Rating** is set to five, the rating for the user will be calculated as (4/5)*5 (that is, *no_of_stars_received /max_endorsement_rating *max_endorsement_rating*). See "Configuring User Endorsement Rating" on page 23.

- **Customized user endorsement**. Users are endorsed by using the web services.

  Use the `task.socialbpm.customendorse.enabled` property to enable the usage of web services for user endorsements. For information about web services, see "Using Services for Business Process Guidance" on page 61.

Endorsement Properties in My webMethods Server

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

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

8 Task Charting and Analyzing Task Activities

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

Editing Chart Settings

Define the chart settings in the Chart Settings dialog box.

Chart Setting	Specifies...
Saved Searches	The task filter for chart results. The public and private saved searches that you defined in My webMethods are available for selection. Default is **All My Tasks (Standard Task Inbox)**.
Chart Type	The type of chart. The following chart types are available for selection: ■ Bar chart ■ Pie chart ■ Donut chart ■ Bubble chart ■ Tree chart Default is **Bar chart**.
Task Parameter	The task data on which the task charting is based.
Group By Task Type	Whether the chart data is grouped by task type. The **Group By Task Type** option: ■ Is not available for Pie chart and Donut chart. ■ Is mandatory for Bubble chart and Tree Chart.

9 Collaborating Task Execution

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

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

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

Task management capabilities available only in Activity Stream

Apart from the task collaboration capabilities specified in "Collaboration task management capabilities available in the Task Detail tab and Activity Stream" on page 52, you have these capabilities in the **Activity Stream**.

Click...	To...
	Apply task management actions to the selected task. For more information, see "Task Actions" on page 40.
	Show older posts in Activity Stream.
	Reply to a comment for a task type.
	Draft an email in the E-mail dialog box and email the user, who wrote the comment.
	Remove a comment from a task.

Creating a Child Task

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

To create a child task

1. Make sure the parent task for which you want to create a child task is enabled for collaboration.
2. In Activity Stream, select the parent task.
3. Click **Create Child Task** icon.
4. In the New Collaboration Task dialog box, specify the field values for the new child task. See the field descriptions in "New Collaboration Task" on page 53.
5. Click **Create New**.

New Collaboration Task

Field	Description
Collaboration Task Type	Select a task type to create a collaboration task.
Name	Type a name for the child task.
Description	Type a description for the child task.
Priority	Select the priority for the task.
Expiration Date	Select the expiry date for the task.
Assign To	Select the user to whom you want to assign the task.
Queue Task Immediately	Select the check box if you want the task to start immediately after creation. Otherwise, the task is deferred to start later. The task status is **New** if the task is not specified to start immediately. Immediately after the task starts, the task status transitions from **New** to **Active**.

10 Viewing Trending Information on Social Media

Twitter Stream on the **What's Happening Now** tab provides the functionality to search the social networking site. You must enable the Twitter settings on the Administration page to view **Twitter Stream**. See "Configuring Business Console with Twitter" on page 21.

By default, this panel does not display anything. If you select a task type in **Process Stream**, you can view the tweets pertaining to the selected task type name.

In Twitter Stream, you can view only 50 recent tweets pertaining to the keyword you searched, and make only 180 searches in an interval of 15 minutes. You will get "Rate limit exceeded" exception if you make frequent search requests.

11 Networking with Task Experts

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

Operations you can perform:

- View profile of an expert
- Send email to an expert

For information about how experts are identified, see "Endorsing Users" on page 45.

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

12 Managing Your Inbox

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

Operations you can perform in Inbox:

Operation	Perform these steps...
View tasks grouped by task type	Select the task type to view all of the tasks of a specific task type or select **My Inbox** to view your task inbox. My Inbox displays all of the tasks assigned to you based on your individual user account, or your group/ role membership, or assignment done by other users.
Filter tasks	Select the filter option from the **Task Filter** list.
Search for tasks instances of a task type	Provide the task ID on the task search field or use saved searches in the task list. For more information, see "Searching for Task Instances" on page 42.
View the unaccepted tasks	Click  on the Business Console title bar
View the tasks expiring today	Click  on the title bar.
Accept tasks	Click **Accept** corresponding to the task in the task list.
Delegate task(s)	Select **Delegate** from the **Actions** menu and select the user to whom you want to delegate the task.
Remove delegation from task(s)	Select **Remove Delegation** from the **Actions** menu.

Operation	Perform these steps...
Set a task list as the default landing page	Select **Set This As Landing Page** from the **Settings** menu.

13 Using Services for Business Process Guidance

Overview

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

- Endorse users based on task tags.
- Endorse user for a task.
- Remove all the endorsements from users.
- Retrieve a list of experts for a task.
- Retrieve the endorsements done for a user.

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

Summary of Services Available for Business Process Guidance

The following services are available:

Task Guidance

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

User Endorsement

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

Social Guidance Service URLs

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

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

Where:

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

Extracting the WSDL for Social Guidance Services

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

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

Example

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

getTaskExpertList

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

Input Parameters

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

Output Parameters

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

listSkillsByUser

Returns all the endorsements of the specified user.

Input Parameters

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

Output Parameters

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

endorseUser

Endorses user for the specified task tags.

Input Parameters

endorsedBy	**String** ID of the user performing the endorsement. In case of system endorsement, 'SYSTEM' is stored in this parameter.
keywordNames	**String** Comma-separated list of task tags.
userID	**String** ID of the My webMethods Server user being endorsed.

Output Parameters

None.

deleteEndorsementForUser

Removes all the endorsements from a specified user.

Input Parameters

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

Output Parameters

None.

endorseUserBasedOnTask

Endorses user for task expertise.

Input Parameters

rating	**Integer** Numeric rating for endorsing the user for all the tags associated with the task.
taskID	**String** ID of the task for which the user is being endorsed.

Output Parameters

None.

Guidance

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

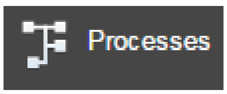
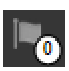
Element	Description
displayName	**String** Displayable name of the expert user.
rating	**Double** Rating of the expert user.
userId	**String** User ID of the expert user on My webMethods Server.

Endorsement

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

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

A Icon Reference

Icon/Image	Click to...
	View and monitor tasks in the What's Happening Now tab (Home).
	View the process execution dashboard.
	View the process analytics dashboard. For more information, see *Working with Business Process Dashboards*.
	View the administrative menu.
	View the unaccepted tasks.
	View the tasks that are expiring today.
	View the process type.
	View the task type.
	Search and view results.
	Expand the process type or task type bar.
	Collapse the process type or task type bar.
	Expand the view.
	Collapse the expanded view.

Icon/Image	Click to...
	Configure setting.
	Refresh content to display the real time changes.