4 Running the process

4.1 Using the Oracle BPM Workspace

Oracle BPM's Workspace is a web application that allows you to interact with a process in relation to your assigned role or roles within your company. The Workspace helps you to manage your tasks effectively and efficiently with minimal training. It serves as a portal, or window, into a business process for which you have an assigned role. When you select a pending task, the Workspace allows you to execute the transaction or transactions associated with the task. The Workspace allows you to access your work with an Internet browser from any location. You can use the Workspace interface like an e-mail reader to view incoming tasks for which you are responsible.

Workspace allows you to:

- Invoke instance activity tasks
- Route completed instances automatically to the user or system responsible for the next step in the process
- Delegate required tasks to a specific end user
- Perform operations on a batch of instances
- Add notes and attachments to an instance of a process
- Customize how your activities and instances are organized
- View detailed activity documentation, notes, attachments, and audit trail information
- Search for instances in processes

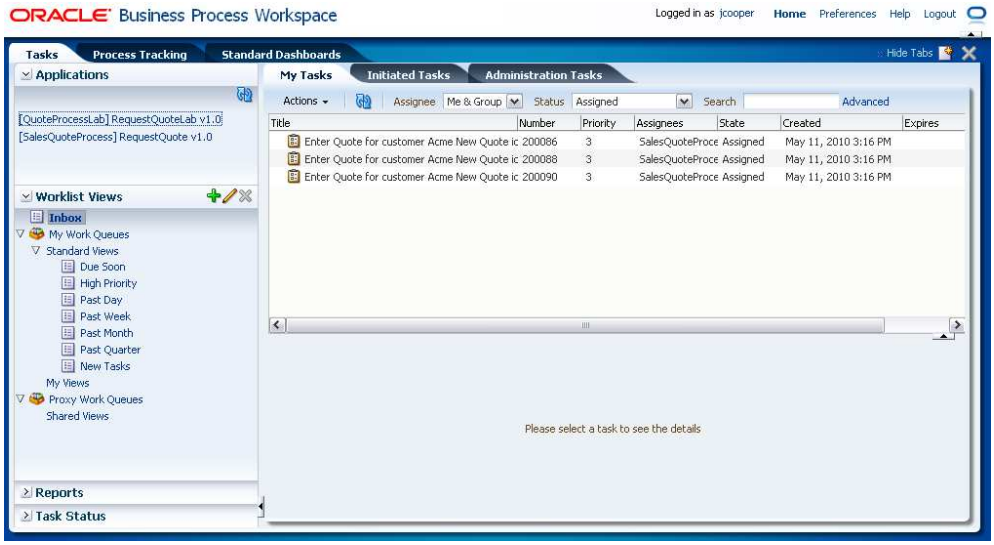
4.2 A Quick Tour of the BPM Workspace

For each process in which you have been assigned a role, the Workspace displays your current tasks. The participants in the process and their roles and groups have already been created. Recall that:

- James Cooper (user id jcooper) was assigned the Sales Representative (SalesRep) role and will be able to do the **Enter Quote Details** activity

- John Steinbeck (user id jstein) was assigned the role Business Practices and will be able to do the Business Practices Review activity. He also has the role of the Process Owner and will be able to perform process administrative functions.
- Charles Dickens (user id cdickens) was assigned the role Approvers and will be able to do Approve Deal activity.
- William Faulkner (user id wfaulk) was assigned the role Contracts and will be able to perform both Approve Terms and Finalize Terms activities.

1. To access the Workspace, type in
   http://localhost:7001/bpm/workspace
   Replace "localhost" with the hostname of your server if BPM is not running locally. If your installation has a separate SOA managed server, you would use port 8001.
2. Log in as "jcooper/welcome1".

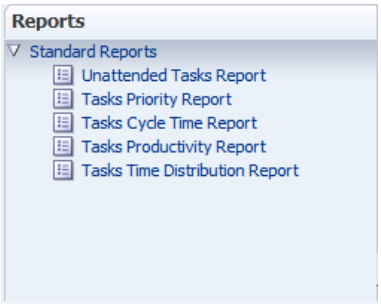


When you first access Workspace after logging on, you are in the **Tasks** section.

The **Inbox** option shows the list of task items assigned to you and your Group in the right pane of the Workspace (similar to an email inbox).

On the left side, below the **Inbox**, you can see that there are other **Views** as well and you can query **Tasks** based on priority, expiration, time window etc.

On the bottom left side, there are pre-seeded reports available to look at different task related performance metrics.



The right-hand section shows the task items for all the process instances in the Inbox. The default view displayed is "**Me & Group**" with Status set to "**Assigned**".

The items appearing in your list are based on the roles assigned to you. Each role is associated with certain activities in a process. For example, if you are have the Business Practices Review role, your role might be assigned to the Business Practices Review activity in your company's Sales Quote process. As a result, when you log onto Workspace, instances in the Business Practices Review activity would appear in the list. On the other hand, a Contracts person logging onto Workspace would not be able to see instances in the Business Practices Review activity, but would see only those in the Approve Terms and Finalize Terms activities.

As an instance flows through a business process, each end user processes the instance by completing the tasks assigned to him or her. Once a task is completed, the process advances to the next activity in the business process. If it is an Interactive Activity, anyone assigned to the role for that activity gets the task and can process it. Alternatively, you can assign the task to a particular user as long as he or she is assigned to the role for that activity.

Description of columns in **My Tasks**:

- **Title**

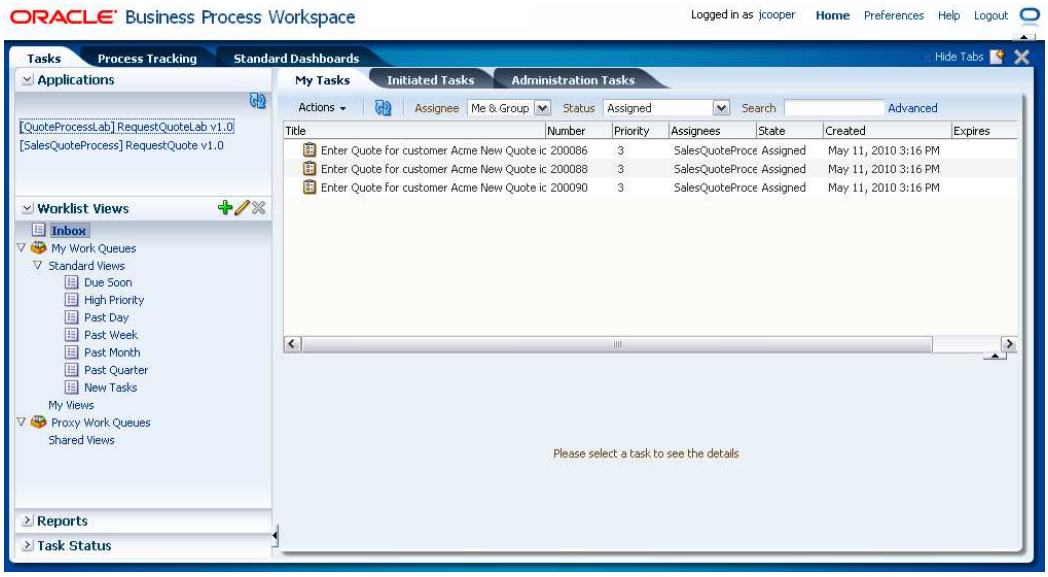
  When you click the Inbox, each task is listed in the right pane of the workspace. The Title column displays information that explains the task. Think of this field as the subject on an e-mail. In the example above, the name of the customer submitting this order is customer **Acme**. You set the title earlier when you set the XPath Expression in the **Enter Quote Details** task definition.

- **Number**
  Each task item has a unique process instance id which is displayed under the Number column. There can be several task items for the same process instance.

- **State**
  The State column indicates the status of the task in the process instance. For example, the status of a task can be "Assigned" or "Completed" or "In process".

- **Date**
  The date represents the timestamp at which the Task is created.

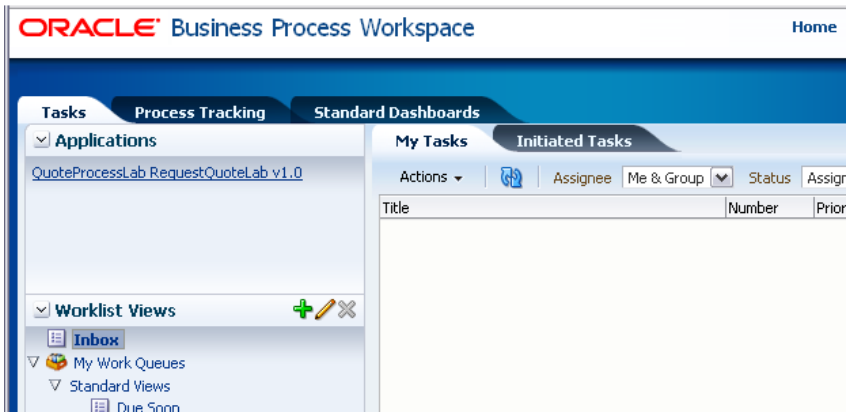
Selecting a particular task item opens the UI interfaces associated with it in the section below. Double-clicking it opens it in a new window.



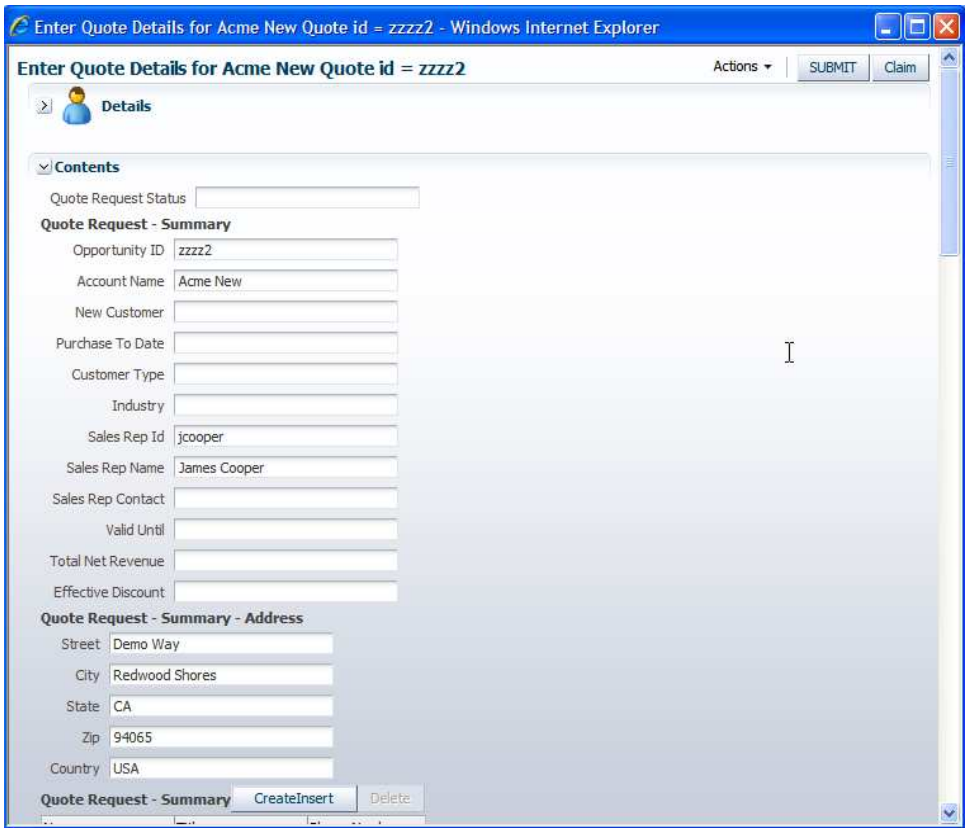
4.3 Triggering the Sales Quote Process

Recollect that the Sales Quote process is triggered by the Sales Representative role with an Initiate task. The BPM process is available to the Sales Rep in Workspace.

1. While logged in as *jcooper*, go to the **Applications** section and click on the process you just deployed – `QuoteProcessLab.RequestQuoteLab_v1.0`. This auto-generates a task item for the **Enter Quote Details** step and opens the task in a new window – you may have to turn off the pop-up blocker in your browser to see it.



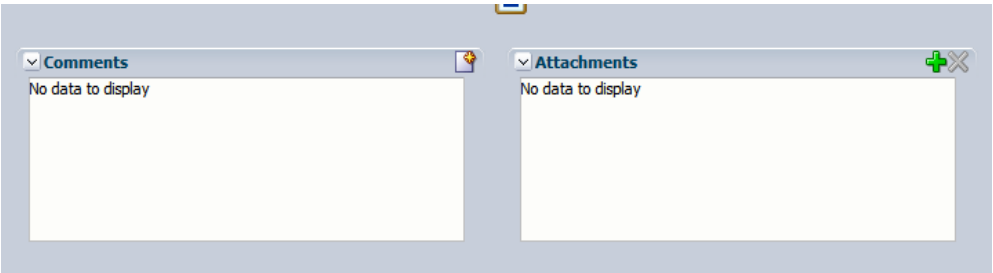
4.4 Executing the Interactive Tasks and completing the Process



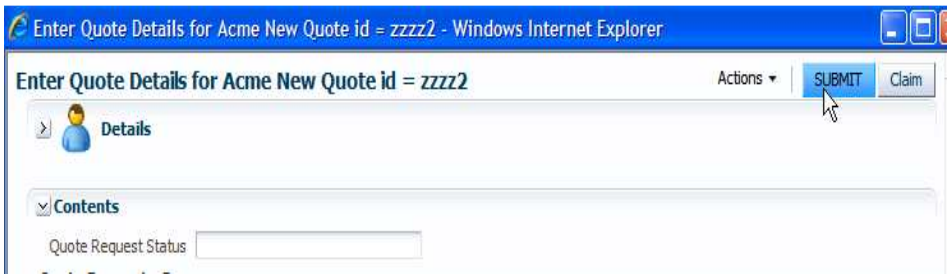
Files can be attached to tasks by anyone involved in a process at any activity and later viewed and used by other participants involved in later activities for the instance in the process.

2. To attach a file to an instance, go to the **Attachments** section (scroll all the way to the bottom) and select the "+" symbol to bring up a file browser and add documents. The file attachment now appears as a link for other participants. They can view the attachment by simply clicking on the link.

3. You can also add a note in the **Comments** section. Any user can add a note to any task item in their view that has not been processed or completed. Other users who work with the task can also access any notes added previously and then add a note of their own if they choose. The process may also add notes automatically to an instance as it flows through the process. The notes added by the process typically point out problems that might have occurred and how to correct them. The notes added by the process automatically appear identical to end user-added notes.



4. In this lab, you can select the **Submit** button at the top right-hand corner to complete the task.



The task has now left jcooper's Inbox.

The Business Practices Review step is always skipped as we have set the **businessPracticesReviewRequired** Boolean data object to be always false.

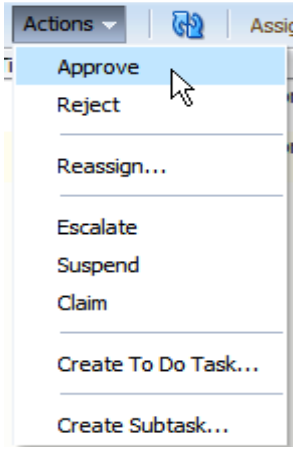
The process now moves to the **Approvers** and **Contracts** roles at the same time for the **Approve Deal** and **Approve Terms** process steps respectively.

5. Log out as *jcooper* and log in as *cdickens* with *welcome1* as the password.

1. You see that a new task item is now available in the **Inbox** of *cdickens*.

2. You can single- or double-click on this item to launch the user interface associated with the task. The double-click action opens it in another window while single-click opens it in the lower pane of the screen. The user interface is the form that was defined for this task.

3. Notice the new task in the **Inbox** for *cdickens*. Select the task and then select **Approve** from the Actions menu or click the **Approve** button on the task to submit the task with the **Approve** outcome.



The **Approve Deal** task item is now removed from the **Inbox** of *cdickens*.

4. Log out again and log in as *wfaulk* Contracts role.

5. Select the **Approve Terms** task item and go to **Actions** and select **Approve.**

6. The **Approve Terms** task item is now removed from the **Inbox** and the **Finalize Contracts** task item gets automatically created. Click on the Refresh icon if you don't see the new task for finalizing the contracts.

7. As the **Contracts** role is responsible for both **Approve Terms** and **Finalize Contracts**, *wfaulk* can act on the **Finalize Contracts** task item as well. Click on **Actions** and select **OK**.

8. This completes the process instance and a file now exists in the output directory you entered for the **SaveQuote** service. Go to the directory and view the file.

From an end user perspective, the most important thing to learn about the Workspace is how to execute activities as the process advances.

Instead of having to log in and log out for each role, you could also login once as ***jstein***, who is the process owner and approve all the tasks. Recollect, that you added the *jstein* user to the **Process Owner** role and he has privileges for all the tasks in the process.

4.5 Monitoring the Process Instance using Workspace

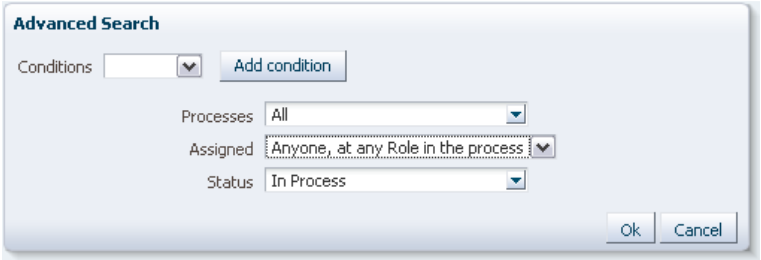
This area has performance issues in this release and you may wish to defer this part of the lab to another time.

1. Log in to **Workspace** as *jstein* with password *welcome1*.

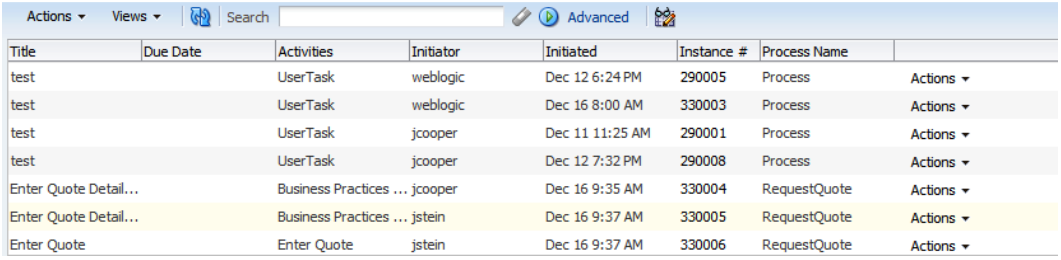
2. Go to **Process Tracking** tab. This section displays the process instances that the user *jstein* is associated with.

3. To search, select the **Advanced** tab. 

4. Choose the default options. Click **OK**.



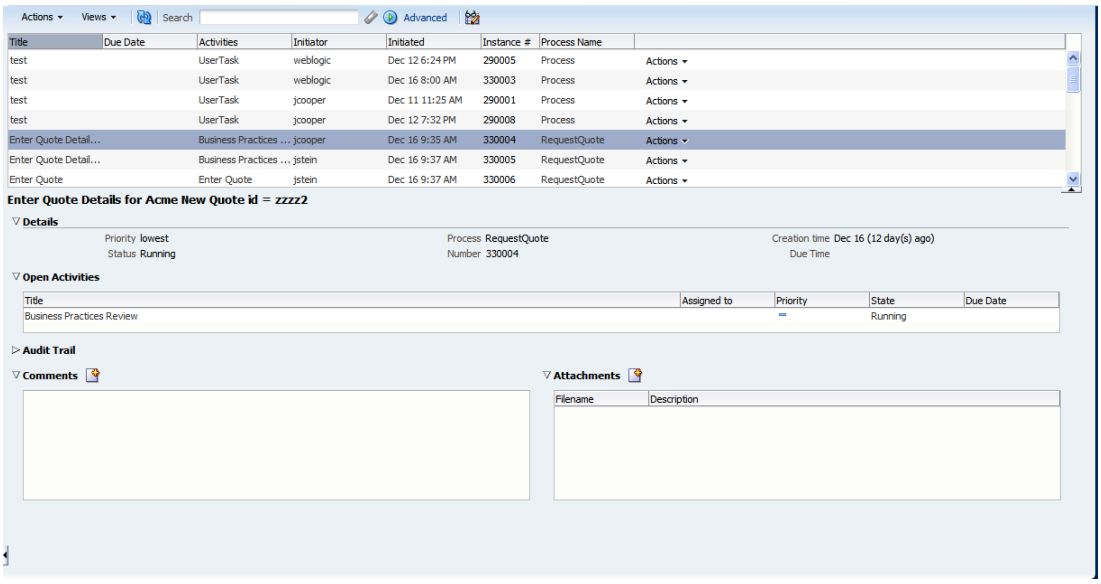
5. The top right section is now populated with process instances that match the search criteria.



Title	Due Date	Activities	Initiator	Initiated	Instance #	Process Name	
test		UserTask	weblogic	Dec 12 6:24 PM	290005	Process	Actions
test		UserTask	weblogic	Dec 16 8:00 AM	330003	Process	Actions
test		UserTask	jcooper	Dec 11 11:25 AM	290001	Process	Actions
test		UserTask	jcooper	Dec 12 7:32 PM	290008	Process	Actions
Enter Quote Detail...		Business Practices ...	jcooper	Dec 16 9:35 AM	330004	RequestQuote	Actions
Enter Quote Detail...		Business Practices ...	jstein	Dec 16 9:37 AM	330005	RequestQuote	Actions
Enter Quote		Enter Quote	jstein	Dec 16 9:37 AM	330006	RequestQuote	Actions

6. Highlight a specific process instance.

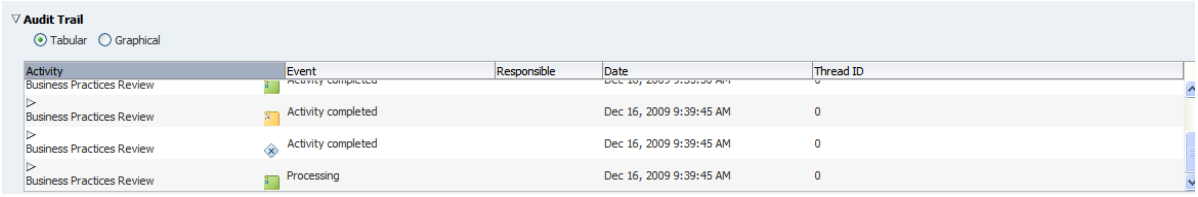
7. This populates the process instance details in the bottom window.

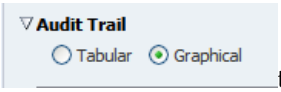


8. The Details segment provides information on the general process status such as whether it is running or completed, the creation time, priority etc.

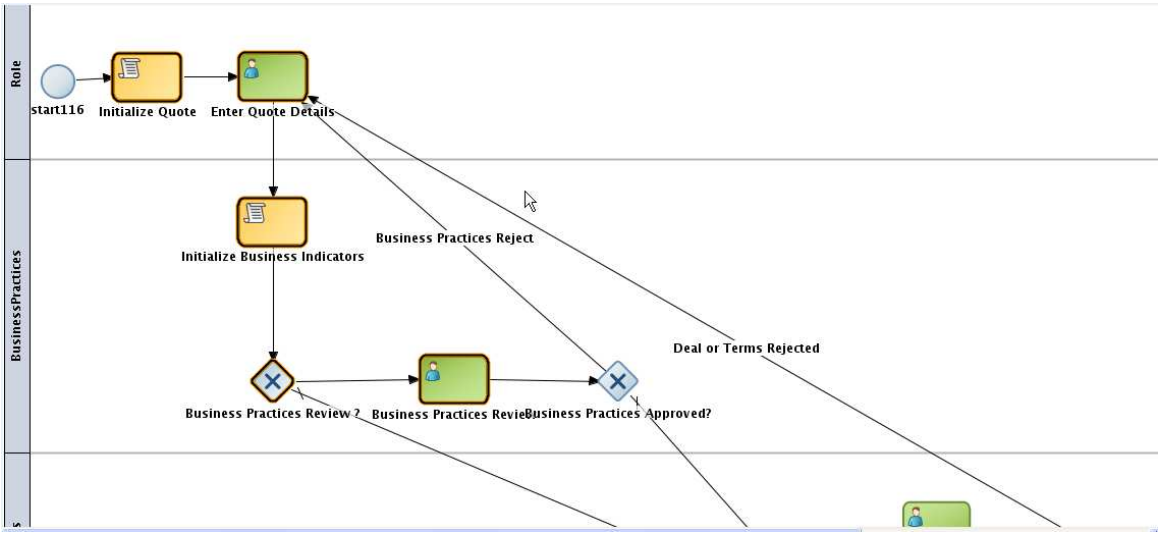
9. The Open Activities provides information on the task items belonging to that process instance that is assigned but not yet completed.

10. Click on the ▷ symbol next to the **Audit trail** and it shows the list of activities completed for that process instance as well as the activity that it is currently waiting on in a tabular format.



11. Switch to the **Graphical view** 

to see the process instance flow in a graphical format.



12. You can also view any **Comments** or **Attachments** associated with the task instance that the process is waiting on.