Peregrine

Get-Answers

Workflow Guide

PART NO: GET-ANS-3.0-01015-00195

Peregrine SYSTEMS®

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Peregrine Systems, Inc.
Worldwide Corporate Campus and Executive Briefing Center
3611 Valley Centre Drive San Diego, CA 92130
Tel 800.638.5231 or 858.481.5000
Fax 858.481.1751
www.peregrine.com

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About This Guide

The Get-Answers Workflow User Guide provides information about the workflow functionality available for editing and reviewing knowledge management documents.

This preface includes the following topics:

- *Organization of this guide* on page 6.
- *Related documentation* on page 6.
- *Contacting customer support* on page 6.

Organization of this guide

This guide includes the following chapters:

Chapter 1, *Workflow Overview* on page 9.

Chapter 2, *Using the Worklist* on page 13.

Chapter 3, *Defining Workflow Templates* on page 27.

Chapter 4, *Using the Request List* on page 69.

Chapter 5, *Using Workflow Administration* on page 73.

Related documentation

In addition to this guide, *Get-Answers Workflow Guide*, the following documentation is available for the Get-Answers product.

This manual...	Provides information on...
User Guide	Searching for, authoring, and managing documents, and generating reports.
Administration Guide	Creating and managing users, and customizing features in Get-Answers.

Contacting customer support

For further information and assistance with Get-Answers, contact Peregrine Systems' Customer Support at: *http://support.peregrine.com*.

You will need the current login and password to access the web page.

Alternatively, you can contact one of the Peregrine Systems Customer Support offices listed below.

Note: Only the European Customer Support staff is multilingual and can provide technical support to customers in their native language.

Corporate Headquarters

Address:	Peregrine Systems, Inc. Attn: Customer Support 3611 Valley Centre Drive San Diego, CA 92130
Telephone:	+(1) (858) 794-7428
Fax:	+(1) (858) 480-3928
Email:	support@peregrine.com

North and South America

Telephone:	(1) (800) 960-9998 (within US and Canada only, toll free) +(1) (858) 794-7428 (Mexico, Central America, and South America)
Fax:	+(1) (858) 480-3928
Email:	support@peregrine.com

Europe, Asia/Pacific, Africa

Visit the Peregrine Systems web site at:
http://sdweb02.peregrine.com/prgn_corp_ap/Support/pstCustomerSupport.cfm
for support contact information for your country and product.

You can also contact the Corporate Headquarters using the information provided above.

1 CHAPTER Workflow Overview

Get-Answers provides a workflow system where a business process is defined in a process definition. The process definition is composed of activities that can be manual activities or automated activities and is used to create and manage process instances. In the execution of a process instance, activity instances are started. The activity instances include work items allocated to a workflow participant or to an invoked application used to support an activity.

This chapter provides a glossary of workflow terminology and includes the following section:

Workflow Terminology on page 10.

Workflow Terminology

Note: This section is not intended to provide a complete list of workflow terminology. The definitions included here are simplified and intended only to give a basic understanding of the terms used in this manual.

Activity A task or set of tasks that forms one logical step within the process definition. An activity can be a *manual activity* or an *automated activity*.

Activity Instance A single instance of an activity within a process instance. A process instance can include multiple activity instances.

An activity that has been started is an activity instance.

AND-Join A point within the workflow where two or more parallel activities are joined and the next logical activity is executed (see *Parallel Routing*).

AND-Split A point within the workflow where a sequential route splits so that two or more parallel activities are formed for independent, simultaneous processing (see *Parallel Routing*). An AND-Join is used to join the parallel activities when their processing is complete.

Audit Data An historical record of the progress of process instances and activity instances.

Get-Answers collects the following information for process instances and activity instances:

Process Instance	Activity Instance
Date Started	Date Assigned
Date Ended	Date Due
	Date Ended

Automated Activity An activity that is performed by a computer, without user intervention.

Business Process A set of linked activities that complete a business objective. A business process is defined in a process definition that can include both automated and manual activities.

Deadline	A time-based scheduling constraint where the work item for an activity must be completed by a specified time.
Escalation	A procedure that is invoked when a specific constraint or condition is not met. An escalation can be automated or manual and generally involves a higher level of authority (see *Organiza-tional Role*).
Event	An occurrence that causes the workflow management software to take one or more actions. An event notifies the workflow engine of an internal or external action.
Iteration	A repetitive execution of one or more activities until a specified condition is met.
Manual Activity	An activity that requires user resources for performance of the required tasks associated with the activity.
OR-Join	A point within the workflow where two or more alternative activity branches are joined into a single activity.
OR-Split	A point within the workflow where a sequential route splits based on a decision upon which branch to take. An OR-Split is conditional and the branch to the next activity is determined by the value returned.
Organizational Role	A group of workflow participants having a specific set of attributes, qualifications, and skills. The participants within the group can perform work items that require a participant who has that set of attributes.
Parallel Routing	A segment of a process instance where two or more activity instances execute in parallel. Parallel routing normally is created with an AND-Split and concludes with an AND-Join.
Process	A set of process activities designed within the process definition according to the requirements of a business process.
Process Definition	A process definition represents a business process and consists of activities where the process tasks are defined. A process definition includes information about the activities and workflow users. Both manual activities and automated activities can be included in the process definition.

Process Instance	A single instance of a process as defined by the process definition. A process that has been started is a process instance.
Process Role	A mechanism that associates workflow participants with workflow activities. The role defines how the user participates in a specific process or activity.
Process State	A representation of the status of a process instance. The Get-Answers workflow uses the following process states: Running—the process instance is running and one or more activities have started. Completed—the process instance has successfully completed all activities. Error—the process instance has encountered an error and stopped.
Sequential Routing	A segment of a process instance where several activity instances are executed in sequence.
Work Item	The work to be processed by a workflow user, as defined in the associated activity. Work items for a user or group of users are accessed through the worklist.
Workflow	The automation of a business process where tasks are passed from one user to another, as defined by the process definition.
Workflow Engine	A software service or “engine” that provides the run time execution environment for a process instance. The workflow engine interprets the process definition, creates process instances and manages their execution, and navigates activities and creates work items for their processing.
Workflow Participant	A user that performs the work items assigned through the worklist. Each work item is represented by a workflow activity.
Worklist	A list of work items associated with a specific user or group of users.

2 CHAPTER

Using the Worklist

After submitting documents, workflow users receive work items through a worklist. This chapter provides information on how to use your worklist and complete your work items.

Topics in this chapter include:

- *Accessing the worklist* on page 14.
- *Completing work items* on page 14.
- *Reassigning a work item* on page 22.
- *Viewing history* on page 23.
- *Viewing status* on page 24.
- *Delegating your worklist to another user* on page 25.

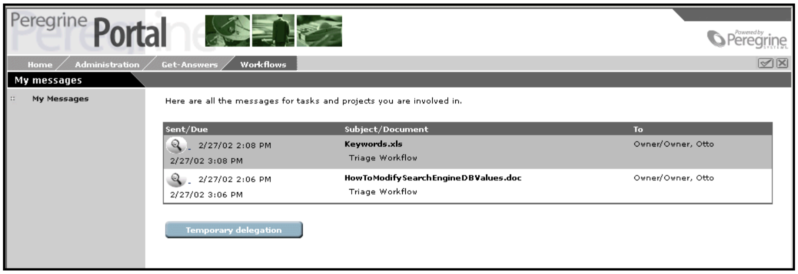
Accessing the worklist

As a workflow user, you will receive work items through your worklist.

To access your worklist:

1. Log on to Get-Answers to display the Navigation Menu on your Home page.

   If you have customized your Home page to include the My Messages workflow component, the My Messages frame will display below the Navigation Menu.
2. Click **Workflows** to display the My Messages page.



Here are all the messages for tasks and projects you are involved in.

Sent/Due	Subject/Document	To
2/27/02 2:08 PM 2/27/02 3:08 PM	**Keywords.xls** Triage Workflow	Owner/Owner, Otto
2/27/02 2:06 PM 2/27/02 3:06 PM	**HowToModifySearchEngineDBValues.doc** Triage Workflow	Owner/Owner, Otto

3. Click any of the task entries for the work item to display the details page.

Completing work items

In Get-Answers, there are two types of Workflows which include Triage (sorting documents) and Editorial work items (or documents). The Triage workflow is used by Owners to examine newly submitted documents that have never been published before. The Editorial workflow is used by Editors and Reviewers to edit and review unpublished documents and their metadata.

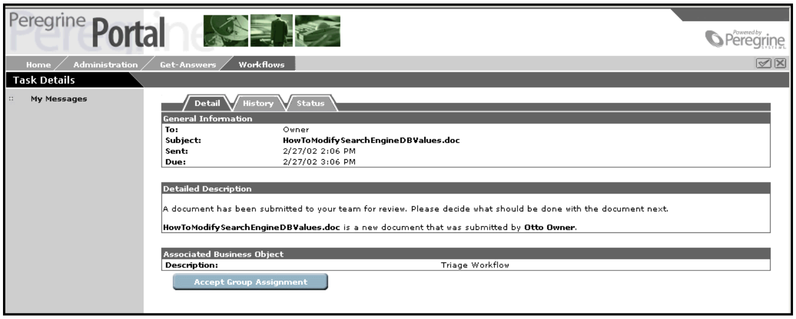
All work items (or documents) must go through the following process by the following Roles:

1. Owner - First, an Owner examines a document and makes a decision about what to do with the document. Options include sending the document into an Editorial workflow, publishing the document, transferring the document, or deleting the document.

2. Editor - Once an Owner marks a document for an Editorial review, an Editor reviews the document and can change the document or its metadata. Editors can also view, add, and delete comments on a document.
3. Reviewer - A Reviewer can view the document and its metadata, but cannot change the document. Reviewers can also view and add comments.
4. Owner - After going through the review process, an Owner can reroute the document back to the Editor, publish the document, transfer the document, delete the document, or revert the document to its original state, if the document was previously published.

To complete a Triage work item:

1. After an Owner selects a Triage work item, the Task Details page displays.


Peregrine Portal
Powered by Peregrine Systems
Home
Administration
Get-Answers
Workflows
Task Details
My Messages
Detail
History
Status
Accept Group Assignment

General Information

To: Owner
Subject: **HowToModifySearchEngineDBValues.doc**
Sent: 2/27/02 2:06 PM
Due: 2/27/02 3:06 PM

Detailed Description

A document has been submitted to your team for review. Please decide what should be done with the document next.

HowToModifySearchEngineDBValues.doc is a new document that was submitted by **Otto Owner**.

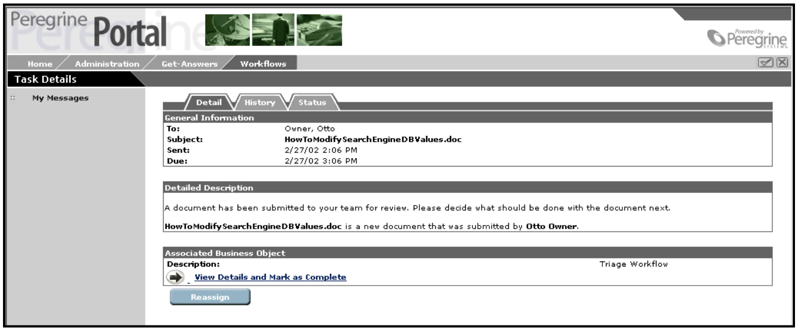
Associated Business Object

Description: Triage Workflow

2. Review the General Information frame of the page and determine if there is a date by which you need to complete the task.

   The date due is optional and depends on the setting defined for the work item activity.
3. Review the instructions in the Detailed Description frame of the page.
4. Click **Accept Group Assignment** to take ownership of the document.

5 Click **View Details and Mark as Complete** to continue into the Triage workflow.


Peregrine Portal
Powered by Peregrine
Home
Administration
Get-Answers
Workflows
Task Details
My Messages
Detail
History
Status
Reassign

General Information

To: Owner, Otto
Subject: **HowToModifySearchEngineDBValues.doc**
Sent: 2/27/02 2:06 PM
Due: 2/27/02 3:06 PM

Detailed Description

A document has been submitted to your team for review. Please decide what should be done with the document next.

HowToModifySearchEngineDBValues.doc is a new document that was submitted by **Otto Owner**.

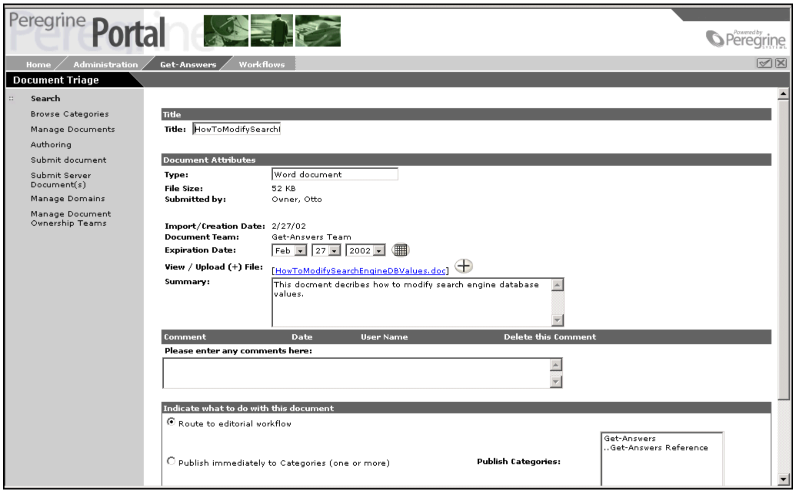
Associated Business Object

Description: Triage Workflow
View Details and Mark as Complete

If you want to reassign the task to another user, see *Reassigning a work item* on page 22.

The **Triage Workflow Form** displays. Depending on whether you are looking at a native document or a new document (created in the Authoring option), the top portion of the page will vary a little bit.

The example below shows a native document in the Triage Workflow. A newly authored document will look like the Authoring page with the same options available for you to use.


Peregrine Portal
Powered by Peregrine
Home
Administration
Get-Answers
Workflows
Document Triage
Search
Browse Categories
Manage Documents
Authoring
Submit document
Submit Server Document(s)
Manage Domains
Manage Document Ownership Teams
Comment
Date
User Name
Delete this Comment

Title

Title: HowToModifySearchl

Document Attributes

Type: Word document
File Size: 52 KB
Submitted by: Owner, Otto

Import/Creation Date: 2/27/02
Document Team: Get-Answers Team
Expiration Date: Feb 27 2002
View / Upload (+) File: [HowToModifySearchEngineDBValues.doc]
Summary: This docment decribes how to modify search engine database values.

Please enter any comments here:

Indicate what to do with this document

● Route to editorial workflow
○ Publish immediately to Categories (one or more)

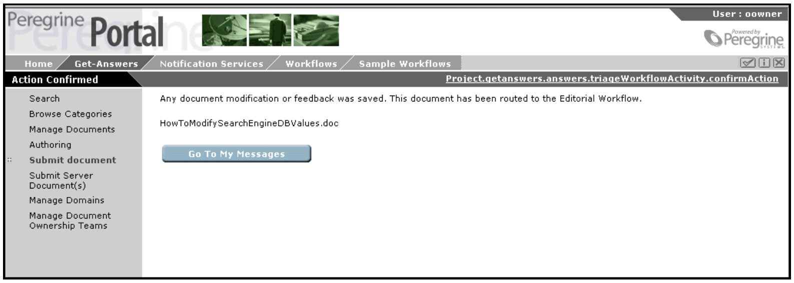
Publish Categories:
Get-Answers
..Get-Answers Reference

6 As an Owner, you can adjust the document before passing it on to an Editor. Specifically, you can do the following:

- Change the actual document.
- Change the metadata for the document.
- Enter any comments you want to include.
- Decide whether to route the document into the editorial workflow.
- Publish the document immediately into the desired domain category.
- Transfer the document to a different document team.
- Delete the document.
- Don't do anything with the document at this time.

7. Click **Save** when you finish.

   The **Action Confirmed** page displays.


Peregrine Portal
User : oowner
Powered by Peregrine
Home
Get-Answers
Notification Services
Workflows
Sample Workflows
Action Confirmed
Project.getanswers.answers.triageWorkflowActivity.confirmAction
Search
Browse Categories
Manage Documents
Authoring
Submit document
Submit Server Document(s)
Manage Domains
Manage Document Ownership Teams
Go To My Messages

Any document modification or feedback was saved. This document has been routed to the Editorial Workflow.

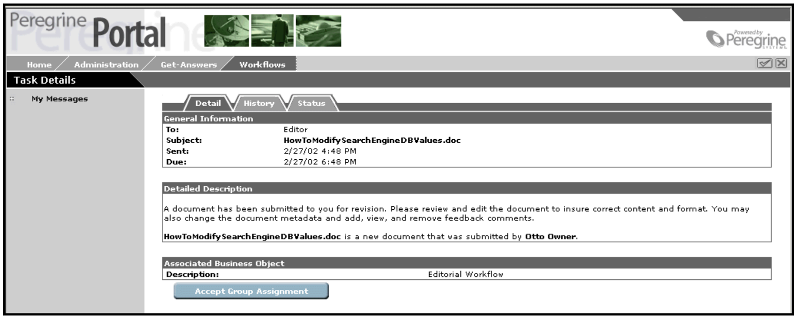
HowToModifySearchEngineDBValues.doc

8. Click **Go To My Messages** to continue reviewing documents.

To complete an editorial work item:

1. After a document is sent to the Editorial workflow, an Editor can select an Editorial work item.

   The **Task Details** page displays.


Peregrine Portal
Powered by Peregrine
Home
Administration
Get-Answers
Workflows
Task Details
My Messages
Detail
History
Status
Accept Group Assignment

General Information

To: Editor
Subject: **HowToModifySearchEngineDBValues.doc**
Sent: 2/27/02 4:48 PM
Due: 2/27/02 6:48 PM

Detailed Description

A document has been submitted to you for revision. Please review and edit the document to insure correct content and format. You may also change the document metadata and add, view, and remove feedback comments.

HowToModifySearchEngineDBValues.doc is a new document that was submitted by **Otto Owner**.

Associated Business Object

Description: Editorial Workflow

2. Review the General Information frame of the page and determine if there is a date by which you need to complete the task.

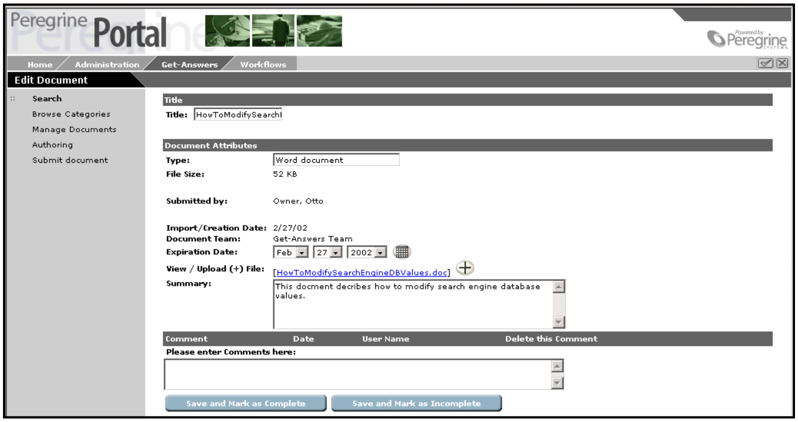
   The date due is optional and depends on the setting defined for the work item activity.

3. Review the instructions in the Detailed Description frame of the page.
4. Click **Accept Group Assignment** to take ownership of the document.
5. Click **View Details and Mark as Complete** to continue into the Editorial workflow.

   Note: If you want to reassign the task to another user, see *Reassigning a work item* on page 22.

The Editorial Workflow Form displays. Depending on whether you are looking at a native document or a new document (created in the Authoring option), the top portion of the page will vary a little bit.

The example below shows a native document in the Editorial Workflow. A newly authored document will look like the Authoring page with the same options available for you to use.


Peregrine Portal
Powered by Peregrine
Home
Administration
Get-Answers
Workflows
Edit Document
Search
Browse Categories
Manage Documents
Authoring
Submit document
Title
Document Attributes
Comment
Date
User Name
Delete this Comment
Save and Mark as Complete
Save and Mark as Incomplete

Title: HowToModifySearchI

Type: Word document

File Size: 52 KB

Submitted by: Owner, Otto

Import/Creation Date: 2/27/02

Document Team: Get-Answers Team

Expiration Date: Feb 27 2002

View / Upload (+) File: [HowToModifySearchEngineDBValues.doc]

Summary: This docment decribes how to modify search engine database values.

Please enter Comments here:

6. As an Editor, you can change the document, change the document metadata, and view, add, or delete comments. Then you can send the document on to a Reviewer.
7. Click **Save and Mark as Complete** when you finish. If you need to stop and return to the document later, click **Save and Mark as Incomplete**.

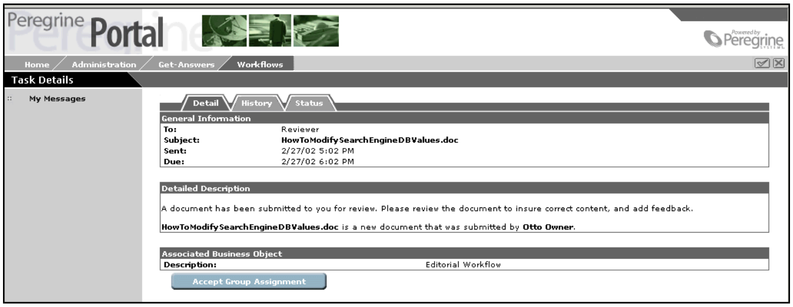
   The Action Confirmed page displays.

8. Click **Go To My Messages** to continue reviewing documents.

To review a work item:

1. After a document is edited and saved as complete, a Reviewer can select a Review Document work item.

   The **Task Details** page displays.


Peregrine Portal
Powered by Peregrine Systems
Home
Administration
Get-Answers
Workflows
Task Details
My Messages
Detail
History
Status
Accept Group Assignment

General Information

To: Reviewer
Subject: **HowToModifySearchEngineDBValues.doc**
Sent: 2/27/02 5:02 PM
Due: 2/27/02 6:02 PM

Detailed Description

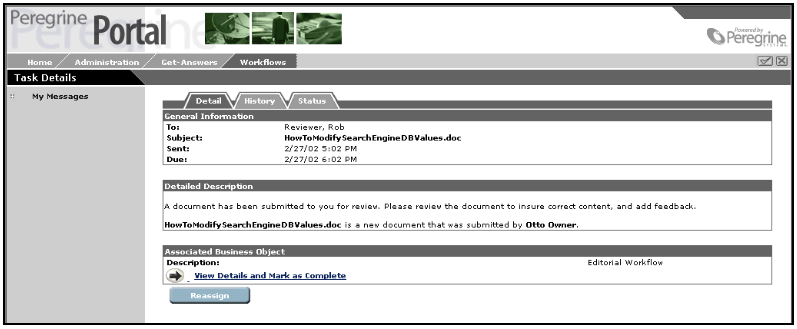
A document has been submitted to you for review. Please review the document to insure correct content, and add feedback.

HowToModifySearchEngineDBValues.doc is a new document that was submitted by **Otto Owner**.

Associated Business Object

Description: Editorial Workflow

2. Click **Accept Group Assignment** to take ownership of the document.


Peregrine Portal
Powered by Peregrine Systems
Home
Administration
Get-Answers
Workflows
Task Details
My Messages
Detail
History
Status
View Details and Mark as Complete
Reassign

General Information

To: Reviewer, Rob
Subject: **HowToModifySearchEngineDBValues.doc**
Sent: 2/27/02 5:02 PM
Due: 2/27/02 6:02 PM

Detailed Description

A document has been submitted to you for review. Please review the document to insure correct content, and add feedback.

HowToModifySearchEngineDBValues.doc is a new document that was submitted by **Otto Owner**.

Associated Business Object

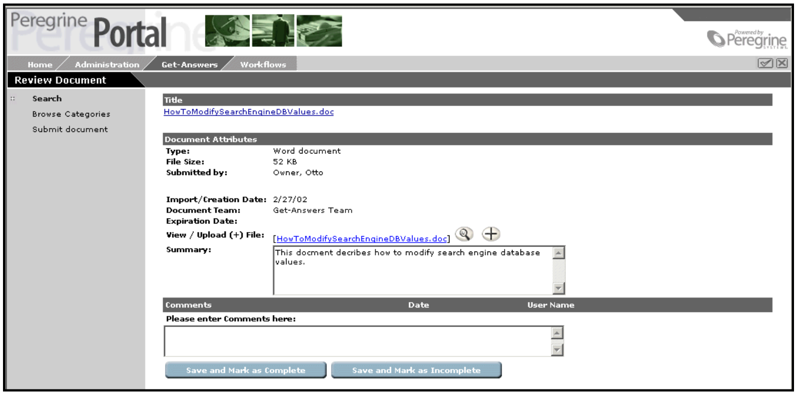
Description: Editorial Workflow

3. Click **View Details and Mark as Complete** to continue into the Editorial workflow.

   Note: If you want to reassign the task to another user, see *Reassigning a work item* on page 22.

The Review Document Form displays. Depending on whether you are looking at a native document or a new document (created in the Authoring option), the top portion of the page will vary a little bit.

The example below shows a native document. A newly authored document will look like the Authoring page with the same options available for you to use.


Peregrine Portal
Powered by Peregrine
Home
Administration
Get-Answers
Workflows
Review Document
Search
Browse Categories
Submit document
Save and Mark as Complete
Save and Mark as Incomplete

Title
HowToModifySearchEngineDBValues.doc

Document Attributes

Type: Word document
File Size: 52 KB
Submitted by: Owner, Otto

Import/Creation Date: 2/27/02
Document Team: Get-Answers Team
Expiration Date:
View / Upload (+) File: [HowToModifySearchEngineDBValues.doc]
Summary: This docment decribes how to modify search engine database values.

Comments	Date	User Name

Please enter Comments here:

4 As a Reviewer, you can view the document and its metadata, and view and add comments.

5 Click **Save and Mark as Complete** when you finish to send the document back to the Owner. If you need to stop and return to the document later, click **Save and Mark as Incomplete.**

The Action Confirmed page displays.

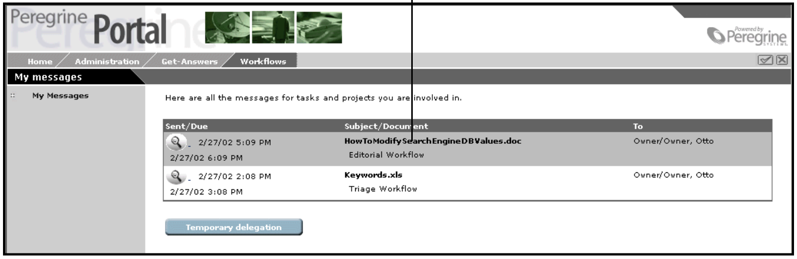
6 Click **Go To My Messages** to continue reviewing documents.

To send the document back to the Owner:

After going through the review process, a document is submitted back to the Owner to publish, revert, delete, transfer, or send the document back into the Editorial workflow for another review cycle.

1. An Owner selects the desired work item.

After a document has been trough the review process once and is sent back to the Owner, the Subject/Document column will say “Editorial Workflow” rather than “Triage Workflow” which is what you see when a document is first submitted.



Here are all the messages for tasks and projects you are involved in.

Sent/Due	Subject/Document	To
2/27/02 5:09 PM 2/27/02 6:09 PM	**HowToModifySearchEngineDBValues.doc** Editorial Workflow	Owner/Owner, Otto
2/27/02 2:08 PM 2/27/02 3:08 PM	**Keywords.xls** Triage Workflow	Owner/Owner, Otto

2. Review the General Information frame of the page and determine if there is a date by which you need to complete the task.

   The date due is optional and depends on the setting defined for the work item activity.

3. Review the instructions in the Detailed Description frame of the page.
4. Click **Accept Group Assignment** to take ownership of the document.
5. Click **View Details and Mark as Complete** to continue into the workflow.

   If you want to reassign the task to another user, see *Reassigning a work item* on page 22.

   The Owner Approval Form displays. It looks very similar to the Triage Workflow Form, but it also contains the comments and changes submitted by the Editor and the Reviewer.

   Depending on whether you are looking at a native document or a new document (created in the Authoring option), the top portion of the page will vary a little bit.

6. Once again, you can do the following:
   - Change the metadata for the document.
   - Enter any comments you want to include.
   - Publish the document into the desired domain category.
   - Transfer the document to a different document team.
   - Delete the document.

- Route the document back to the Editor.
- Don’t do anything with the document at this time.

7 Click **Save** when you finish.

The **Action Confirmed** page displays.

8 Click **Go To My Messages** to continue reviewing documents.

Reassigning a work item

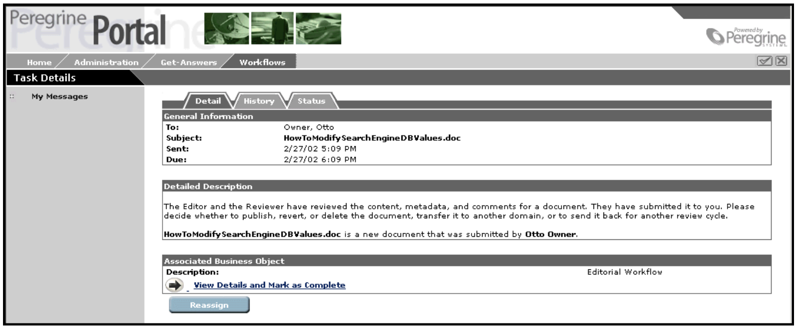
Reassigning a work item to another user will add that work item to the worklist of the other user and will remove the work item from your worklist.

Note: To temporarily reallocate all of your work items to any user, see *Delegating your worklist to another user* on page 25.

To reassign a task to another user:

1 From the Task Details page, click **Reassign**.

The Reassign Task page displays.


Peregrine Portal
Powered by Peregrine
Home
Administration
Get-Answers
Workflows
Task Details
My Messages
Detail
History
Status
Reassign

General Information

To:	Owner, Otto
Subject:	**HowToModifySearchEngineDBValues.doc**
Sent:	2/27/02 5:09 PM
Due:	2/27/02 6:09 PM

Detailed Description

The Editor and the Reviewer have reviewed the content, metadata, and comments for a document. They have submitted it to you. Please decide whether to publish, revert, or delete the document, transfer it to another domain, or to send it back for another review cycle.

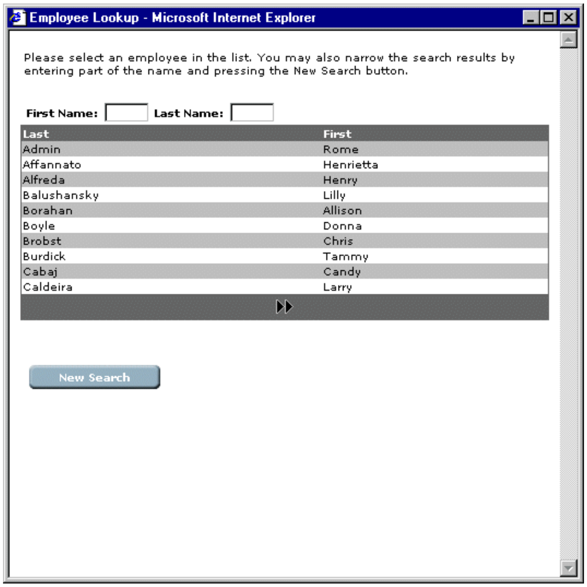
HowToModifySearchEngineDBValues.doc is a new document that was submitted by **Otto Owner**.

Associated Business Object

Description: Editorial Workflow

View Details and Mark as Complete

2 Click the magnifying glass in the **Select the person** frame to display the Employee Lookup window.



Please select an employee in the list. You may also narrow the search results by entering part of the name and pressing the New Search button.

First Name: Last Name:

Last	First
Admin	Rome
Affannato	Henrietta
Alfreda	Henry
Balushansky	Lilly
Borahan	Allison
Boyle	Donna
Brobst	Chris
Burdick	Tammy
Cabaj	Candy
Caldeira	Larry

3 Using this window, select the person you want to reassign the work item.

The name of the person selected will display next to the magnifying glass in the details page.

4 Click **Submit**.

The work item will be removed from your work list and will display in the work list of the user where it was reassigned.

Viewing history

You can view the history of the work items for a process instance.

To view the process instance history:

1 From the My Messages page, click any of the column entries for a work item.

The details page for the selected work item will display.

2 Click the **History** tab to display the history list of the process instance activities.

The history list contains the following columns for the previous work items and the current work item for that specific process instance:

Start Date—The date the work item was started.

End Date—The date the work item was completed.

Subject—A brief description of the work item.

To—The name of the person or group assigned the work item.

Status—The status of the work item (such as, **Done** or **In progress**).

Viewing status

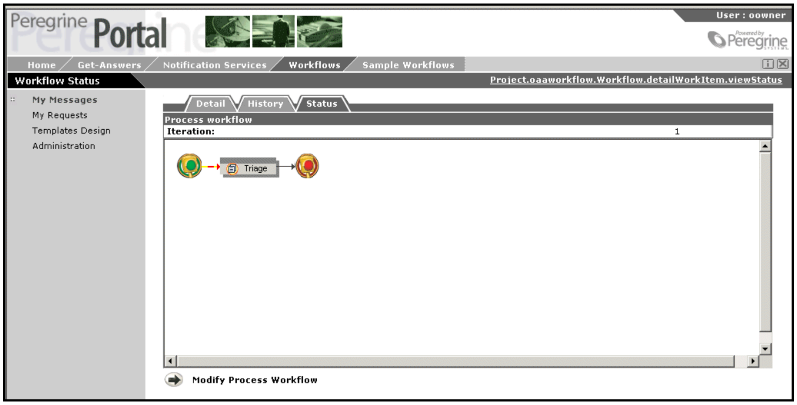
You can view the status of the activities for a process instance.

To view the status of the process instance:

1. From the My Messages page, click any of the column entries for a work item.

   The details page for the selected work item displays.

2. Click the **Status** tab to display a graphical representation of the process instance.


Peregrine Portal
User : oowner
Powered by Peregrine
Home
Get-Answers
Notification Services
Workflows
Sample Workflows
Workflow Status
Project.oaaworkflow.Workflow.detailWorkItem.viewStatus
My Messages
My Requests
Templates Design
Administration
Detail
History
Status
Process workflow
Triage
Modify Process Workflow

Iteration: 1

Blinking yellow and orange arrows indicate the activities in the process instance that have been completed or are currently in progress. This is true for activities that are executed more than once because of an iteration or jump.

When the cursor is placed over an activity, a ScreenTip will display information about the activity.

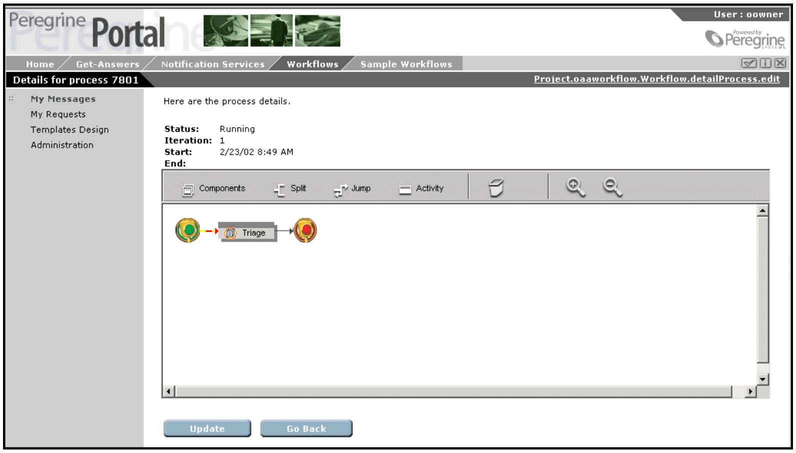
Modifying a process instance workflow

There may be times that an activity needs to be added to a process instance, or other changes to the workflow are required.

Note: Changes to the process instance workflow does not change the workflow process template. After a process instance is started, it is no longer linked to the workflow template.

To modify the workflow for a process instance:

1 Click **Modify Process Workflow** to display the graphical workflow designer for the process instance.



Details for process 7801

Here are the process details.

Status: Running
Iteration: 1
Start: 2/23/02 8:49 AM
End:

Peregrine Portal
User : oowner
Powered by Peregrine
Home
Get-Answers
Notification Services
Workflows
Sample Workflows
Project.oaaworkflow.Workflow.detailProcess.edit
My Messages
My Requests
Templates Design
Administration
Components
Split
Jump
Activity
Triage
Update
Go Back

2 Add activities using the toolbar icons, or modify or delete activities.

See *Creating a Workflow Template* on page 28 for information on using the graphical workflow designer.

Note: You can only add, modify, or delete activities that are not completed or active for this iteration.

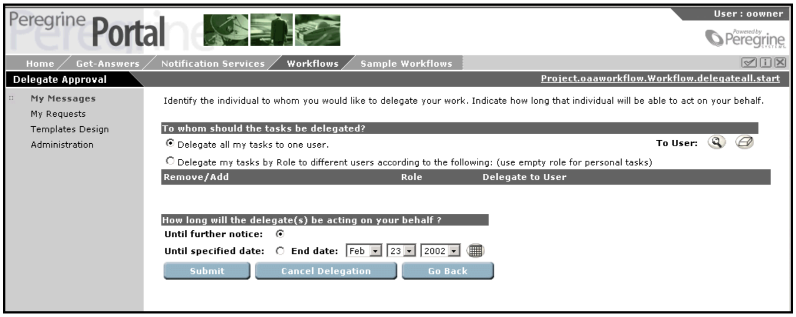
3 Click **Update** to save the changes, or click **Back** to cancel changes and return to the work item.

Delegating your worklist to another user

There may be times when you need to delegate your work items to another user. For example, when you go on vacation, or when you will be out of the office for several days.

To temporarily delegate your worklist to another user:

1. Access your Home page or the My Messages page.
2. Click **Temporary Delegation** to display the Delegate Approval page.


Peregrine Portal
User : oowner
Powered by Peregrine
Home
Get-Answers
Notification Services
Workflows
Sample Workflows
Delegate Approval
Project.oaaworkflow.Workflow.delegateall.start
My Messages
My Requests
Templates Design
Administration
Remove/Add
Role
Delegate to User
Submit
Cancel Delegation
Go Back

Identify the individual to whom you would like to delegate your work. Indicate how long that individual will be able to act on your behalf.

To whom should the tasks be delegated?

● Delegate all my tasks to one user. **To User:**

○ Delegate my tasks by Role to different users according to the following: (use empty role for personal tasks)

How long will the delegate(s) be acting on your behalf ?

Until further notice: ●

Until specified date: ○ **End date:** Feb 23 2002

3. Click the magnifying glass to display the Employee Lookup window.
4. Using this window, select the person to assign your worklist.

   The name of the person selected will display next to the magnifying glass.
5. If you want the delegation to last until further notice, select the **Until further notice** option button.
6. If you want the delegation to be until a specific date, select the **Until specified date** option button.
7. Select the end date from the **End date** drop-down lists.
8. Click **Submit**.

   Your work items will display in the worklist of the person assigned in the delegation, and will also continue to display in your worklist.

To cancel a delegation:

1. Access your Home page or the My Messages page.
2. Click **Temporary Delegation** to display the Delegate Approval page.
3. Click **Cancel Delegation**.

3

CHAPTER

Defining Workflow Templates

Workflow templates are process definitions for business processes associated with a Get-Answers business object. You can attach business objects to a specified workflow template designed for processing work for the business object.

Note: The workflow template functions can be accessed only by users having the required capabilities (permissions), such as an Administrator.

This chapter includes the following sections:

Creating a Workflow Template on page 28.

Modifying a Workflow Template on page 44.

Deleting a Workflow Template on page 48.

Creating a Component Template on page 48.

Creating a Workflow Template

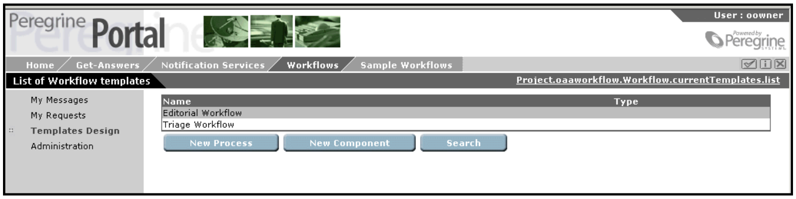
Workflow provides a graphical workflow designer for designing and creating workflow templates. After a workflow template is created and attached to a business process, process instances of the workflow template can be started.

Each process instance will be routed according to the activities specified in the workflow template, but the workflow definition for a process instance is no longer linked to the workflow template. If changes to the routing are required during processing, the user can modify the workflow through the workflow designer for that specific process instance. The workflow template will not be changed and future process instances will be routed according to the workflow template.

To create a workflow template:

1. Log on to Get-Answers to display the Navigation Menu on your Home page.
2. Click the **Workflows** tab, or click **Workflows** from the Navigation Menu.

   The Workflow menu displays.
3. Click **Templates Design** from the Workflows menu to display the List of Workflow templates page.


Peregrine Portal
User : oowner
Powered by Peregrine
Home
Get-Answers
Notification Services
Workflows
Sample Workflows
My Messages
My Requests
Templates Design
Administration
New Process
New Component
Search

List of Workflow templates

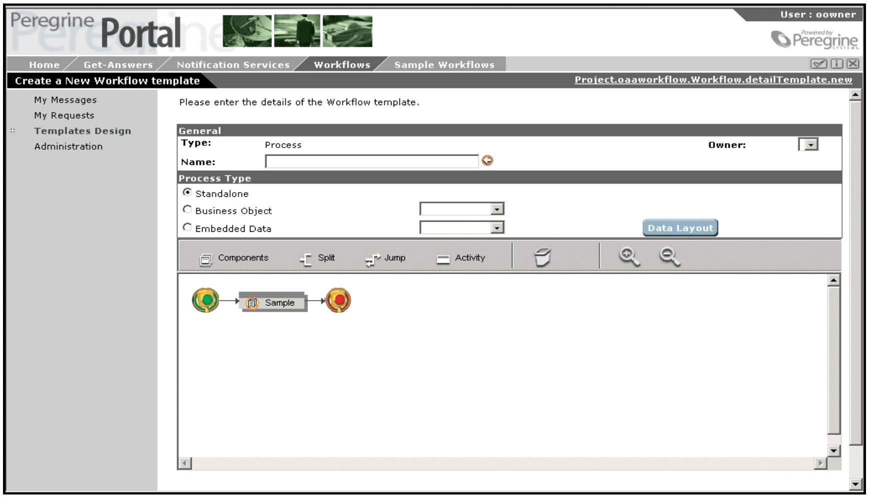
Project.oaaworkflow.Workflow.currentTemplates.list

Name	Type
Editorial Workflow	
Triage Workflow	

Note: After workflow templates are defined, the template name for each template will display in the list.

4. Click **New Process**.

The Create a New Workflow page displays.



Peregrine Portal
User : oowner
Powered by Peregrine
Home
Get-Answers
Notification Services
Workflows
Sample Workflows
Create a New Workflow template
Project.oaaworkflow.Workflow.detailTemplate.new
My Messages
My Requests
Templates Design
Administration
Data Layout
Components
Split
Jump
Activity
Sample

Please enter the details of the Workflow template.

General

Type: Process

Name:

Owner:

Process Type

● Standalone

○ Business Object

○ Embedded Data

The Type entry of **Process** is created by the system based on your selection of the New Process button.

5 In the Name text box, type the name of the new workflow template.

6 In the Process Type section, select one of the option buttons to define the process type associated with this workflow template.

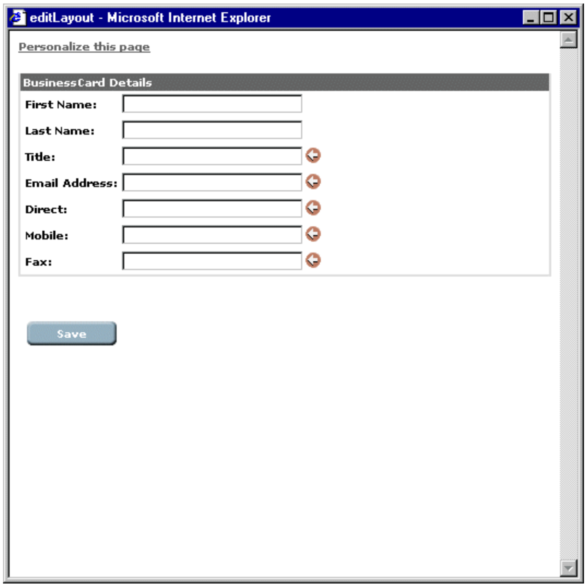
- **Standalone**—When the **Standalone** option button is selected, there is no link to a business object or to data.
- **Business Object**—When the **Business Object** option button is selected, the workflow will be related to a business object.
- **Embedded Data**—When the **Embedded Data** option button is selected, the workflow will be related to data. This data is not stored in the database, but is carried with the process.

7 If you selected the **Business Object** option button, select the business object from the associated drop-down list.

8 If you selected the **Embedded Data** option button:

a Select the entity or schema from the associated drop-down list.

b Click **Data Layout** to display the EditLayout window.



editLayout - Microsoft Internet Explorer
Personalize this page
BusinessCard Details
First Name:
Last Name:
Title:
Email Address:
Direct:
Mobile:
Fax:
Save

You can change the data layout using the **Personalize this page** option at the top of the page.

c Click Save to exit the **EditLayout** window and return to the Create a New Workflow page.

The workflow template will define a specific process definition. The name assigned to the template *must* be unique and should reflect the process definition.

Each workflow template must have a **Start** and **End** activity. When initially displayed, the workflow designer contains the **Start** and **End** activity, and includes a sample activity that can be modified for use in your workflow template or can be deleted. See *Modifying an Activity* on page 42 and *Deleting an Activity* on page 43.

9 In the workflow designer, create and add activities to the workflow template using the toolbar icons described in the following table.

Icon	Description
Components	Select a new activity from the template list. See *To add a component template:* on page 41 for information on adding an activity from the template list.
Split	Create a new Select activity. See *To create and add a Select activity:* on page 36 for information on adding a Select activity.
Jump	Create a new Jump activity. See *To create and add a Jump activity:* on page 39 for information on adding a Jump activity.
Activity	Create a new activity. See *To create and add a new activity:* on page 31 for information on adding a new activity.
🗑	Trash. See *To delete an activity:* on page 43 for information on deleting an activity from a workflow template.

In addition to the activity icons on the toolbar, zoom functionality is provided by the following toolbar icons.

Icon	Description
🔍+	To zoom in on the workflow template graphic, click the **Zoom in** icon until the required magnification is achieved.
🔍−	To zoom out on the workflow template graphic, click the **Zoom out** icon.

Creating a New Activity

These activities represent the basic activities used when defining a workflow template for a specific process definition.

To create and add a new activity:

Activity

1 Position the cursor over the **Activity** icon, then click and hold down the left mouse button.

2 Drag the **Activity** icon over an activity so that the new activity will precede, follow, or be parallel to that activity.

Notice that a rectangle outlined in red will display along with the icon.

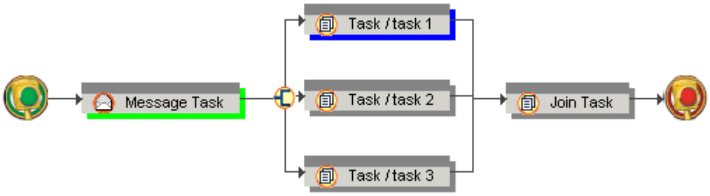
3 To select the placement of the new activity, position the red rectangle in one of the positions described in the following table and release the left mouse button.

Note: The position of the new activity is determined by where the red rectangle is located when you release the mouse button.

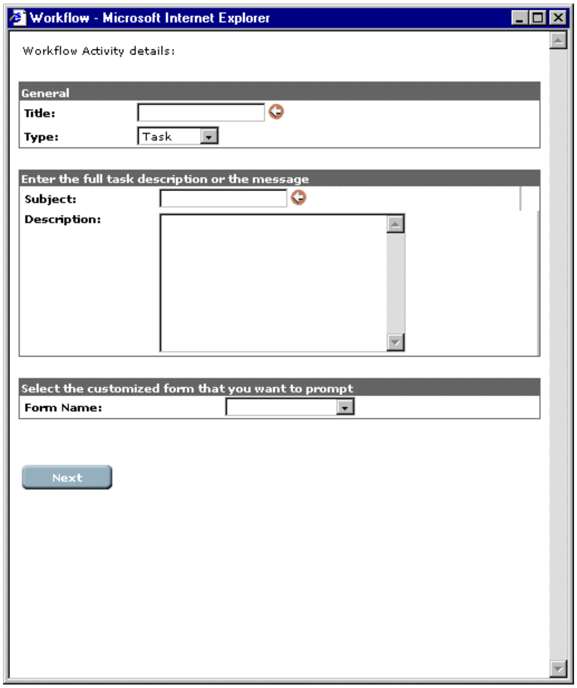
When positioned...	The activity will be placed...
over the first half of the current activity	before the current activity
over the last half of the current activity	after the current activity
over the top half of the current activity	above the current activity
over the bottom half of the current activity	below the current activity

Parallel routing is defined by creating activities above or below a current activity (AND-Split). The activities are then joined later in the process by adding an activity after the parallel activities (AND-Join).

Important: Do not use the **End** activity to join parallel activities.



After you click the mouse button, the Workflow window displays. You will define the details for the new activity through this window.


Workflow - Microsoft Internet Explorer
Workflow Activity details:
General
Title:
Enter the full task description or the message
Subject:
Description:
Select the customized form that you want to prompt
Form Name:
Next

Type: Task

4 In the **Title** text box, type the title you want to display on the activity in the workflow designer.

5 Select **Task** from the **Type** drop-down list. In Get-Answers, you can only use Task type activities.

6 In the **Subject** text box, type a short description of the task.

This description will display in the ScreenTip when the cursor is placed over the activity.

7 In the **Description** box, type a full description of the task.

8 If you want to prompt a customized form for a business object, select the name of the form from the **Form Name** drop-down list.

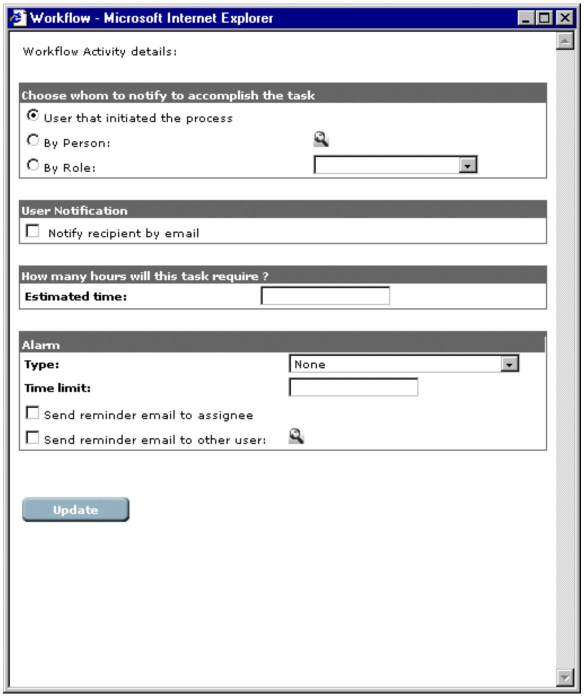
Instead of the standard **Task Details** page, the selected form will display when viewing task details.

9 Click **Next**.

The **Workflow** window displays additional activity details.

To complete the activity details for a Task:

When the activity type is **Task**, the Workflow window shown below is displayed.



Workflow Activity details:

Choose whom to notify to accomplish the task

● User that initiated the process

○ By Person:

○ By Role:

User Notification

☐ Notify recipient by email

How many hours will this task require ?

Estimated time:

Alarm

Type: None

Time limit:

☐ Send reminder email to assignee

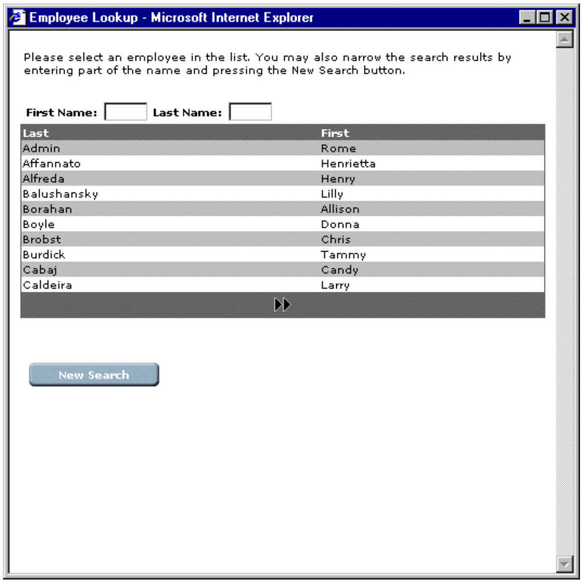
☐ Send reminder email to other user:

1 In the **Choose whom to notify to accomplish the task** section, select one of the option buttons to determine who is notified of the task.

- **User that initiated the process**—The user who initiated the process will be notified.
- **By Person**—The specific person selected will be notified.
- **By Role**—All users assigned to the selected role will be notified.

2 If you selected the **By Person** option button:

a Click the magnifying glass to display the **Employee Lookup** window.



Please select an employee in the list. You may also narrow the search results by entering part of the name and pressing the New Search button.

First Name: ☐ **Last Name:** ☐

Last	First
Admin	Rome
Affannato	Henrietta
Alfreda	Henry
Balushansky	Lilly
Borahan	Allison
Boyle	Donna
Brobst	Chris
Burdick	Tammy
Cabaj	Candy
Caldeira	Larry

b Using this window, select the person you want to notify.

The name of the person selected will display next to the option button.

3 If you selected the **By Role** option button, select the role from the associated drop-down list.

4 If you want to notify the user by e-mail, select the **Notify recipient by email** check box.

Note: The user will be notified by the method set in the **Notification Services** tab. For information on Notification Services, refer to the *Notifications Service Quick Start Guide.*

When a user receives an e-mail notification, it contains standard message text and a link to the Get-Answers application where the associated activity will be displayed.

5 When the task is time-sensitive, type the number of hours allocated for the task to be completed in the **Estimated time** text box.

6 Select the **Send reminder email to assignee** check box to send the e-mail notification to the person assigned to the task.

7 Select the **Send reminder email to other user** check box to send the e-mail notification to another person.

This person may be a supervisor or project manager who needs to know that a time-sensitive task is pending.

8 Click the magnifying glass to display the Employee Lookup window.

9 using the window, select the other user to notify.

10 Click **Update** to complete the task definition and display the activity in the workflow designer.

Creating a Select Activity

A Select activity is used to branch workflow routing (OR-Split). The workflow route is determined by a decision made in the previous activity or, in the case of a Custom Select, by the value returned after a script is executed.

To create and add a Select activity:

1 Position the cursor over the Split icon, then click and hold down the left mouse button.

2 Drag the Split icon over an activity so that the new activity will precede, follow, or be parallel to that activity.

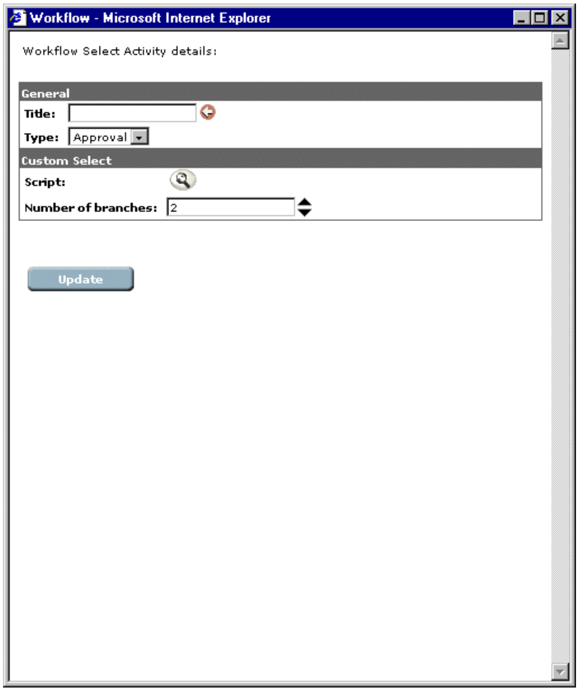
Notice that a rectangle outlined in red will display along with the icon.

3 To select the placement of the Select activity, position the red rectangle in one of the positions described in the following table and release the left mouse button.

Note: The position of the activity is determined by where the red rectangle is located when you release the mouse button.

When positioned...	The activity will be placed...
over the first half of the current activity	before the current activity
over the last half of the current activity	after the current activity
over the top half of the current activity	above the current activity
over the bottom half of the current activity	below the current activity

After you release the mouse button, the **Workflow** window will display.



Workflow Select Activity details:

Title:

Type: Approval

Script:

Number of branches: 2

4 Type a name for the task in the **Title** text box.

The title will display (followed by the task number) on each of the activities associated with this Select activity.

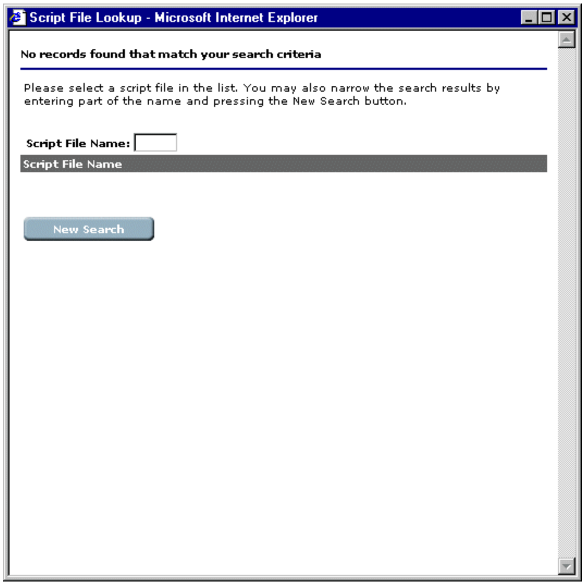
5 Select the type of selection from the **Type** drop-down list.

Values are:

- **Approval**—checks the previous activity to determine the routing requirements.
- **Custom**—determines the routing requirements from the value returned by a script.

If you selected **Approval**, go to step 8 to complete the procedure.

6 If you selected **Custom**, click the magnifying glass next to **Script** to display the **Script File Lookup** window.


Script File Lookup - Microsoft Internet Explorer

No records found that match your search criteria

Please select a script file in the list. You may also narrow the search results by entering part of the name and pressing the New Search button.

Script File Name:

Script File Name

New Search

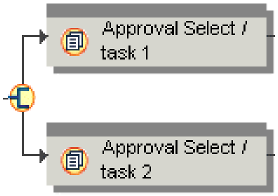
7 Using this window, locate and select the script file.

The selected script file name will display next to **Script** in the **Workflow** window.

8 Type or select the number of branches in the **Number of branches** text box.

9 Click **Update** to complete the Select activity definition and display the activity in the workflow designer.

A Select activity creates activities for each of the branches is created.


Approval Select / task 1
Approval Select / task 2

The top activity (task 1) will execute when the prior task is approved. The bottom activity (task 2) will execute when the prior task is declined.

10 Click each of the branch activities and modify the activity details.

See *Modifying an Activity* on page 42 for information on modifying activity details.

Creating a Jump Activity

A Jump activity is used to re-route the process forward or backward to a specific activity. For example, when an approval is declined, the process may be sent back to another activity for changes or sent forward to the **End** activity.

To create and add a Jump activity:

1 Position the cursor over the Jump icon, then click and hold down the left mouse button.

2 Drag the Jump icon over an activity so that the new activity will precede, follow, or be parallel to that activity.

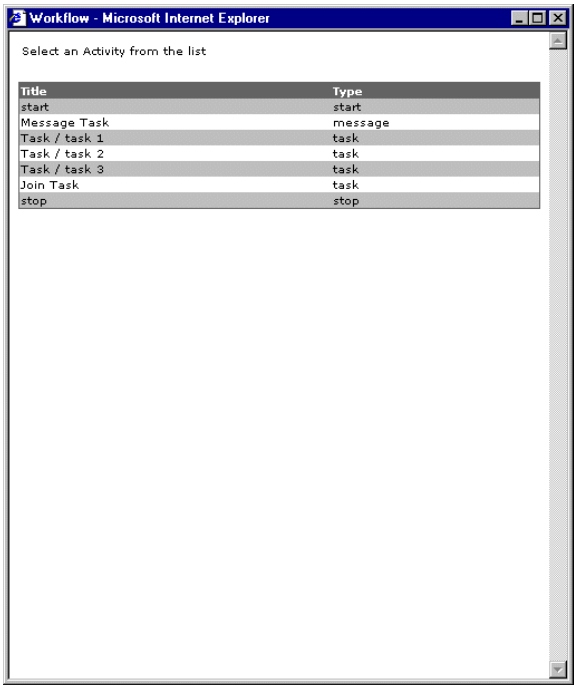
Notice that a rectangle outlined in red will display along with the icon.

To select the placement of the Jump activity, position the red rectangle in one of the positions described in the following table and click the left mouse button

Note: The position of the activity is determined by where the red rectangle is located when you release the mouse button.

When positioned...	The activity will be placed...
over the first half of the current activity	before the current activity
over the last half of the current activity	after the current activity
over the top half of the current activity	above the current activity
over the bottom half of the current activity	below the current activity

After you release the mouse button, the **Workflow** window will display.



Select an Activity from the list

Title	Type
start	start
Message Task	message
Task / task 1	task
Task / task 2	task
Task / task 3	task
Join Task	task
stop	stop

3 From the activity list, select the destination activity for the jump.

The title of the destination activity will display in the ScreenTip when the cursor is placed over the jump activity.

The **Workflow** window will close and the Jump activity will be added in the workflow designer.

Adding a Component Template

Component templates are a set of activities that represent a portion of a process that can be used in more than one workflow template. See *Creating a Component Template* on page 48.

When component templates have been pre-defined in the system, you can add them to your workflow template if they meet your requirements for the process being defined.

A component template that is added to a workflow process template is a copy and is no longer linked to the original component template. If changes are made to the original component template, a component template previously added to a workflow process template will not inherit those changes.

To add a component template:

Components

1 Position the cursor over the Components icon, then click and hold down the left mouse button.

2 Drag the Components icon over an activity so that the component template will precede, follow, or be parallel to that activity.

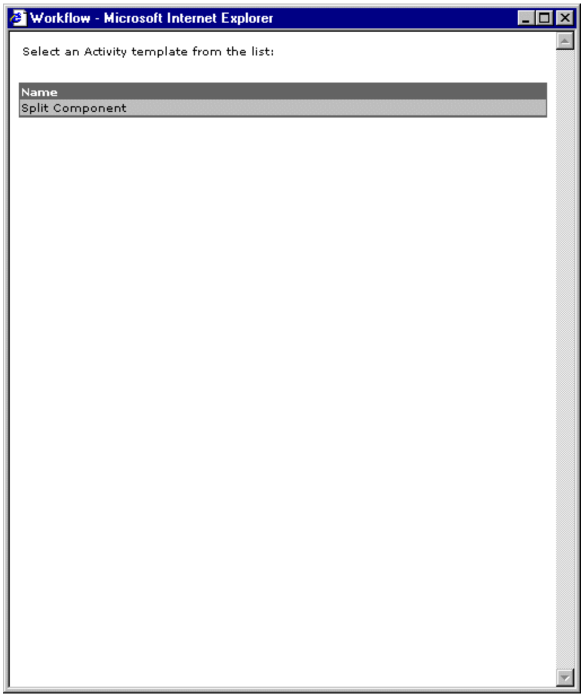
Notice that a rectangle outlined in red will display along with the icon.

To select the placement of the activity, position the red rectangle in one of the positions described in the following table and release the left mouse button.

Note: The position of the activity is determined by where the red rectangle is located when you release the mouse button.

When positioned...	The activity will be placed...
over the first half of the current activity	before the current activity
over the last half of the current activity	after the current activity
over the top half of the current activity	above the current activity
over the bottom half of the current activity	below the current activity

After you release the mouse button, the **Workflow** window will display a list of component templates.



Select an Activity template from the list:

Name
Split Component

3 Click the component template you want to add to the workflow template.

The **Workflow** window will close and the component template will be added in the workflow designer.

Modifying an Activity

In the process of designing a workflow template, after activities are created, they may need to be moved to another location in workflow, re-defined using different options, or renamed.

The **Sample** activity provided in the initial workflow designer must be modified if you want to use it within your workflow template.

Activities can be modified before or after the workflow template is saved.

Note: Modifying an activity within a workflow template that has already been created does not effect process instances that are currently running. After a process instance is started, it is no longer linked to the workflow template.

To modify an activity:

1. Click the activity you want to modify.

   The **Workflow** window for the selected activity will display the activity details.

2. Make the required modification to the activity details.

   Depending on the activity you are modifying, see *Creating a New Activity* on page 31, *Creating a Select Activity* on page 36, *Creating a Jump Activity* on page 39, or *Adding a Component Template* on page 40 for specific instructions on defining activity details.

3. Click **Update**.

Deleting an Activity

Activities can be deleted from a workflow template before or after the workflow template is saved.

Note: Deleting an activity within a workflow template that has already been created does not effect process instances that are currently running. After a process instance is started, it is no longer linked to the workflow template.

To delete an activity:

1. Using the left mouse button, click the activity you want to delete and hold down the mouse button.
2. Drag and drop the activity onto the **Trash** icon.

Saving the Workflow Template

After a new workflow template is completed, you must save the template. To save the workflow template

- ▶ Click **Create**.

  The workflow template will be added to the **List of Workflow templates**.

Note: If you exit the **Create a New Workflow** page prior to clicking **Create**, all changes to the workflow template will be discarded.

Modifying a Workflow Template

A workflow template can be modified as necessary to ensure its continued alignment with the business process it represents.

Note: Modifying a workflow template does not effect process instances that are currently running. After a process instance is started, it is no longer linked to the workflow template.

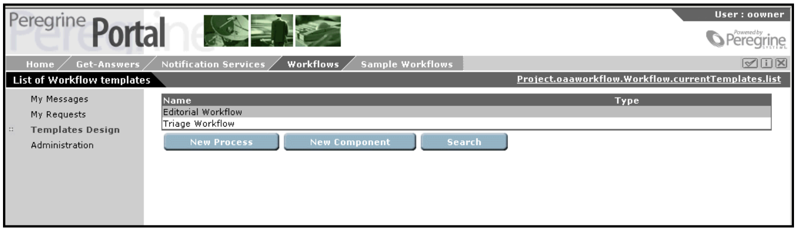
To modify a workflow template:

1 Log on to Get-Answers to display the **Navigation Menu** on your **Home** page.

2 Click the **Workflows** tab, or click **Workflows** from the **Navigation Menu**.

The **Workflow** menu will display in the left pane.

3 Click **Templates Design** from the **Workflows** left pane menu to display the **List of Workflow templates** page.

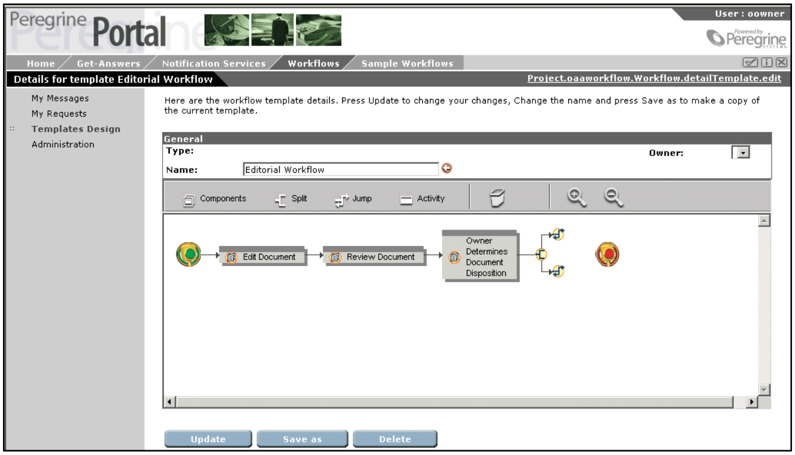

Peregrine Portal
User : oowner
Powered by Peregrine
Home
Get-Answers
Notification Services
Workflows
Sample Workflows
List of Workflow templates
Project.oaaworkflow.Workflow.currentTemplates.list
My Messages
My Requests
Templates Design
Administration
New Process
New Component
Search

Name	Type
Editorial Workflow	
Triage Workflow	

4 Locate the workflow template you want to modify. You can modify the Editorial Workflow or Triage Workflow templates.

5 Click the name of the workflow template you want to modify.

The **Details for template** page is displayed.



Peregrine Portal
User : oowner
Powered by Peregrine
Home
Get-Answers
Notification Services
Workflows
Sample Workflows

Details for template Editorial Workflow

Project.oaaworkflow.Workflow.detailTemplate.edit

My Messages
My Requests
Templates Design
Administration

Here are the workflow template details. Press Update to change your changes, Change the name and press Save as to make a copy of the current template.

General

Type:

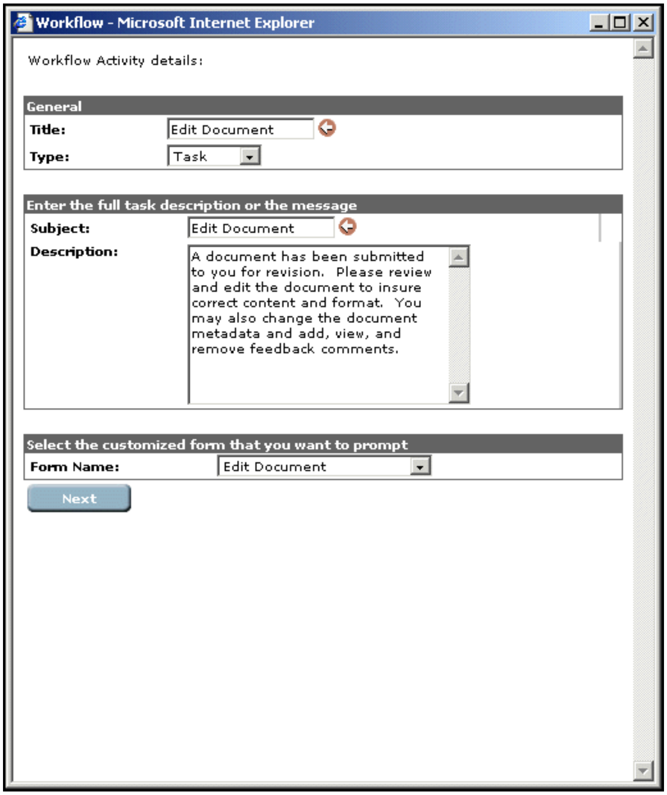
Owner:

Name: Editorial Workflow

Components
Split
Jump
Activity
Edit Document
Review Document
Owner Determines Document Disposition
Update
Save as
Delete

6 Double-click the desired gray box on the graphical layout of the template.

The Workflow Activity details page displays.



Workflow Activity details:

General

Title: Edit Document

Type: Task

Enter the full task description or the message

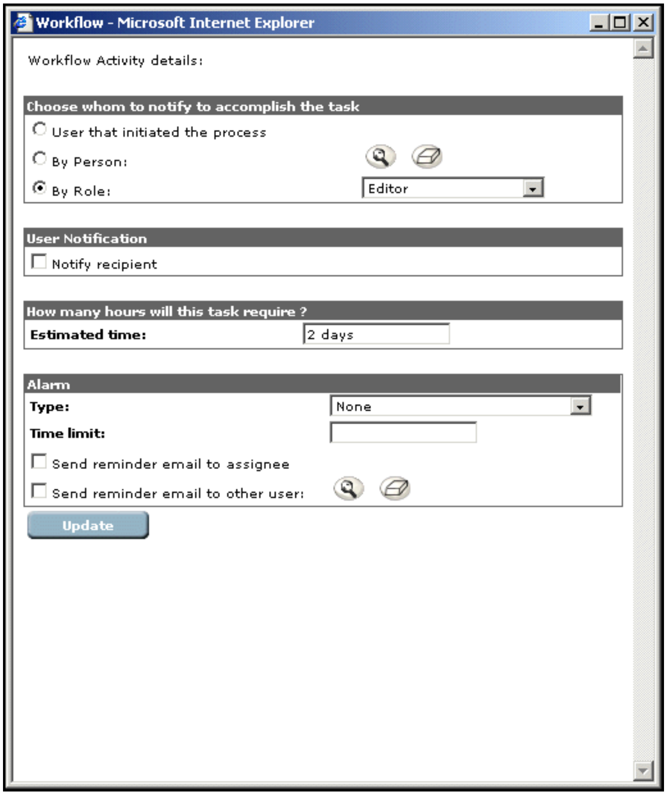
Subject: Edit Document

Description: A document has been submitted to you for revision. Please review and edit the document to insure correct content and format. You may also change the document metadata and add, view, and remove feedback comments.

Select the customized form that you want to prompt

Form Name: Edit Document

7 Click **Next** to display the second page.



Workflow Activity details:

Choose whom to notify to accomplish the task

○ User that initiated the process

○ By Person:

● By Role: Editor

User Notification

☐ Notify recipient

How many hours will this task require ?

Estimated time: 2 days

Alarm

Type: None

Time limit:

☐ Send reminder email to assignee

☐ Send reminder email to other user:

8 Make the necessary modifications to the template. Click **Update** when you finish.

9 To add other items from the toolbar in the graphical layout of the template, see the following cross-references.

See *Creating a Component Template* on page 48 for information on adding components.

See *Creating a Select Activity* on page 36 for information on adding select activities (or splits).

See *Creating a Jump Activity* on page 39 for information on adding jump activities.

See *Creating a Workflow Template* on page 28 for information on adding, modifying, or deleting activities.

10 Click **Update** to update the workflow template and return to the List of Workflow Templates page.

Deleting a Workflow Template

When a workflow template is no longer useful or the process has been redefined as another template, you can delete the workflow template.

Note: Deleting a workflow template does not effect process instances that are currently running. After a process instance is started, it is no longer linked to the workflow template.

To delete a workflow template:

1. Log on to Get-Answers to display the **Navigation Menu** on your **Home** page.
2. Click the **Workflows** tab, or click **Workflows** from the **Navigation Menu.**

   The **Workflows** menu will display in the left pane.
3. Click **Templates Design** from the **Workflows** menu to display the **List of Workflow templates** page.
4. Locate the workflow template you want to delete.

   Note: Do not delete the Editorial Workflow or Triage Workflow default templates.
5. Click the name of the workflow template you want to delete.

   The **Details for template** page is displayed.
6. Click **Delete** to delete the workflow template and return to the **List of Workflow templates** page.

   The workflow template list no longer displays the name of the deleted workflow template.

Creating a Component Template

Component templates are a set of activities that represent a portion of a process. These templates can be used when designing workflow process templates.

To create a component template:

1. Log on to Get-Answers to display the **Navigation Menu** on your **Home** page.

2. Click the **Workflows** tab, or click **Workflows** from the **Navigation Menu.**

   The **Workflow** menu will display in the left pane.

3. Click **Templates Design** from the **Workflows** left pane menu to display the **List of Workflow templates** page.

   Note: After component templates are defined, the template name and type (**Component**), will display in the list.

4. Click **New Component.**

   The **Create a New Workflow** page is displayed.

5. In the **Name** text box, type the name of the new component template.

   The component template will define a specific set of activities. The name assigned to the template *must* be unique.

   Notice that the workflow designer contains only a sample activity. Since a component template is designed to be added to a workflow template, component templates do *not* contain the **Start** and **End** activities.

   The sample activity can be modified for use in the component template or deleted. See *Modifying an Activity* on page 42 and *Deleting an Activity* on page 43.

6. In the workflow designer, create and add activities to the component template using the toolbar icons described in the following table.

Icon	Description
Components	Select a new activity from the template list. See *To add a component template:* on page 41 for information on adding an activity from the template list.
Split	Create a new Select activity. See *To create and add a Select activity:* on page 36 for information on adding a Select activity.
Jump	Create a new Jump activity. See *To create and add a Jump activity:* on page 39 for information on adding a Jump activity.
Activity	Create a new activity. See *To create and add a new activity:* on page 31 for information on adding a new activity.
🗑	Trash. See *To delete an activity:* on page 43 for information on deleting an activity from a workflow template.

In addition to the activity icons on the toolbar, zoom functionality is provided by the following toolbar icons.

Icon	Description
⊕	To zoom in on the workflow template graphic, click the **Zoom in** icon until the required magnification is achieved.
⊖	To zoom out on the workflow template graphic, click the **Zoom out** icon.

To create and add a new activity, see *Creating a New Activity* on page 31. To create and add a Jump activity, see *Creating a Jump Activity* on page 39. To create and add a Select activity, see, *Creating a Select Activity* on page 36. To add a component template for inclusion into this component template, see *Adding a Component Template* on page 40.

See *Modifying an Activity* on page 42 and *Deleting an Activity* on page 43 for information on modifying and deleting activities.

7 Click **Create**.

The component template will be added to the **List of Workflow templates**.

Note: If you exit the **Create a New Workflow** page prior to clicking **Create**, all changes to the workflow template will be discarded.

Manually creating the workflow templates

The workflow templates are imported when you install Get-Answers, but if you should need to manually create the workflow templates, see the instructions below.

Triage Workflow

The Triage Workflow is used examine newly submitted documents that have never been published before, in order to determine if the document should be further reviewed in an Editorial Workflow, published immediately, transferred to a different Document Team, or deleted.

Occasions that trigger the workflow

The Triage Workflow is triggered by one of the following:

- Via the Authoring menu option, a new structured document is submitted.

- Via the Submit Document menu option, a new document is submitted.
- A Document Team Owner from one Document Team transferred ownership of a document to another Document Team.

Task and Form Contents

The Triage Workflow has a single task in its workflow, which has an action form that is followed by a confirmation form.

The owner can edit the metadata and the document. The owner can enter comments and can save and mark the item incomplete, so they can go back and work on the document or metadata later and review the comments already added.

Using a standard workflow function via the reassign option, the owner can reassign the Triage task to another owner, who would then see any comments that the first owner entered.

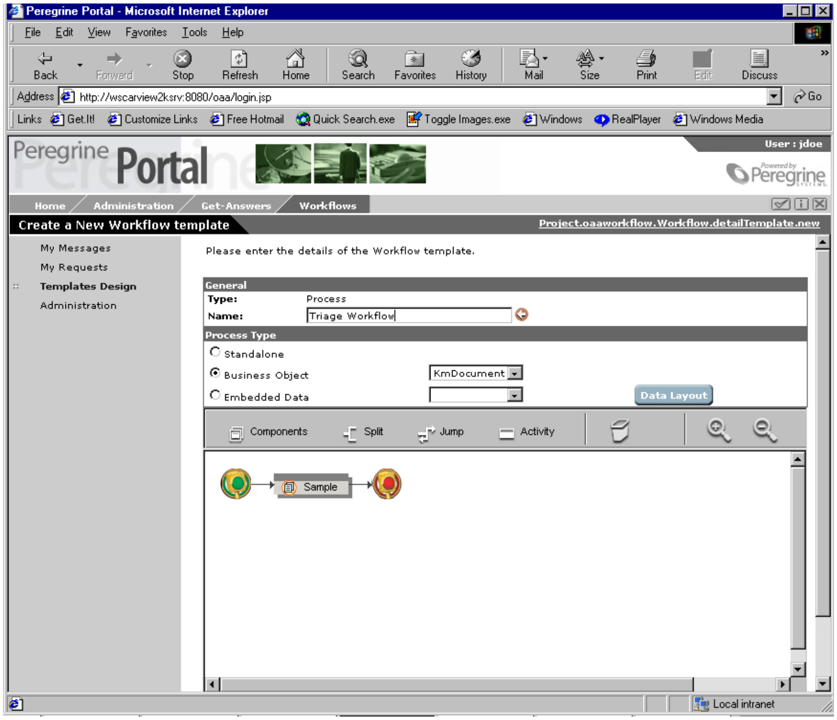
In this single task form, the owner can route the document to the editorial workflow, publish it immediately, transfer the document to the domain of a different Document Team, or delete the document.

Creating the Triage Workflow Template

To create the Triage template workflow:

1. Click the **Workflows** tab.
2. Click **Templates Design** in the menu options.

3 Click the **New Process** button.


Peregrine Portal - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Size Print Edit Discuss
Address http://wscarview2ksrv:8080/oaa/login.jsp
Go
Links Get It! Customize Links Free Hotmail Quick Search.exe Toggle Images.exe Windows RealPlayer Windows Media
Peregrine Portal
User : jdoe
Powered by Peregrine
Home Administration Get-Answers Workflows
Project.oaaworkflow.Workflow.detailTemplate.new
My Messages
My Requests
Templates Design
Administration
Data Layout
Components Split Jump Activity
Sample
Local intranet

Create a New Workflow template

Please enter the details of the Workflow template.

General

Type: Process

Name: Triage Workflow

Process Type

○ Standalone

● Business Object KmDocument

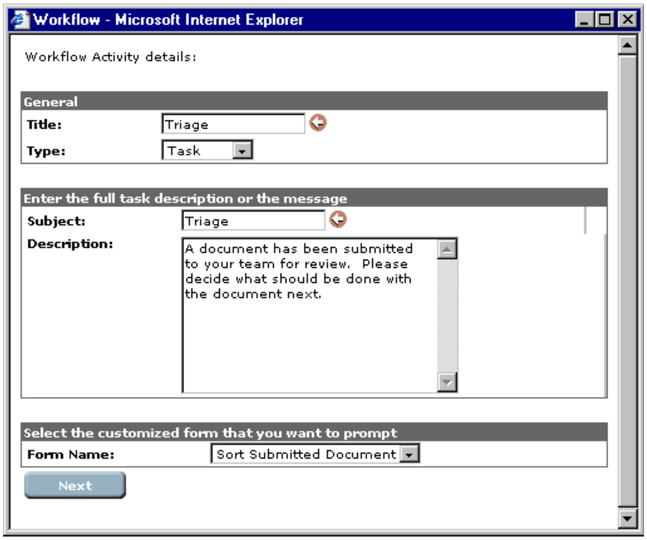
○ Embedded Data

4 For Name, type **Triage Workflow**.

5 For Business Object, select **KmDocument**.

6 Click on the **Sample** component between the green and red lights.

A Workflow Activity details window displays.



Workflow Activity details:

General

Title: Triage

Type: Task

Enter the full task description or the message

Subject: Triage

Description: A document has been submitted to your team for review. Please decide what should be done with the document next.

Select the customized form that you want to prompt

Form Name: Sort Submitted Document

7 For Title, type **Triage**.

8 Set the Type to **Task**.

9 Set Subject to **Triage**.

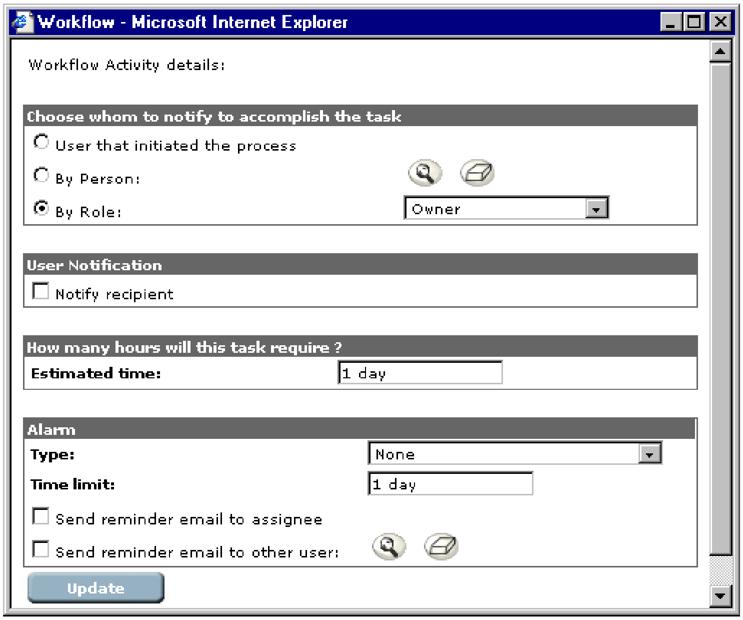
10 Enter the following description in the Description text box:

A document has been submitted to your team for review. Please decide what should be done with the document next.

11 Set the Form Name to **Sort Submitted Document**.

12 Click the **Next** button.

The first window closes and a second Workflow Activity details window displays.



Workflow Activity details:

Choose whom to notify to accomplish the task

○ User that initiated the process

○ By Person:

● By Role: Owner

User Notification

☐ Notify recipient

How many hours will this task require ?

Estimated time: 1 day

Alarm

Type: None

Time limit: 1 day

☐ Send reminder email to assignee

☐ Send reminder email to other user:

13 Select **By Role** and from the pop-up menu, select **Owner**.

14 Set Estimated Time to **24 hours.**

15 Click **Update**. The second window closes.

16 On the Details for template Triage Workflow form, scroll down to the bottom of the page and click the **Create** button.

You’ve just created the Triage Workflow template.

Editorial Workflow

The Editorial Workflow is used to edit and review an unpublished (working copy) document and its metadata.

Occasions that trigger the workflow

The Editorial Workflow is triggered by one of the following:

- In the Manage Documents menu option, the Document Team Owner has clicked on the Modify link, confirmed the Modify in the next frame, and entered comments to guide the owner's team of editors and reviewers in reviewing the document.
- In the Triage Workflow, the Document Team Owner has decided to send a newly submitted document to the Editorial Workflow.

Tasks and form contents

The Editorial Workflow has three tasks:

Task 1: A Document Team Editor can change the document and/or the metadata, and can view, add, and delete comments.

Task 2: A Document Team Reviewer can view (but not modify) the document and its metadata, and can view and add comments.

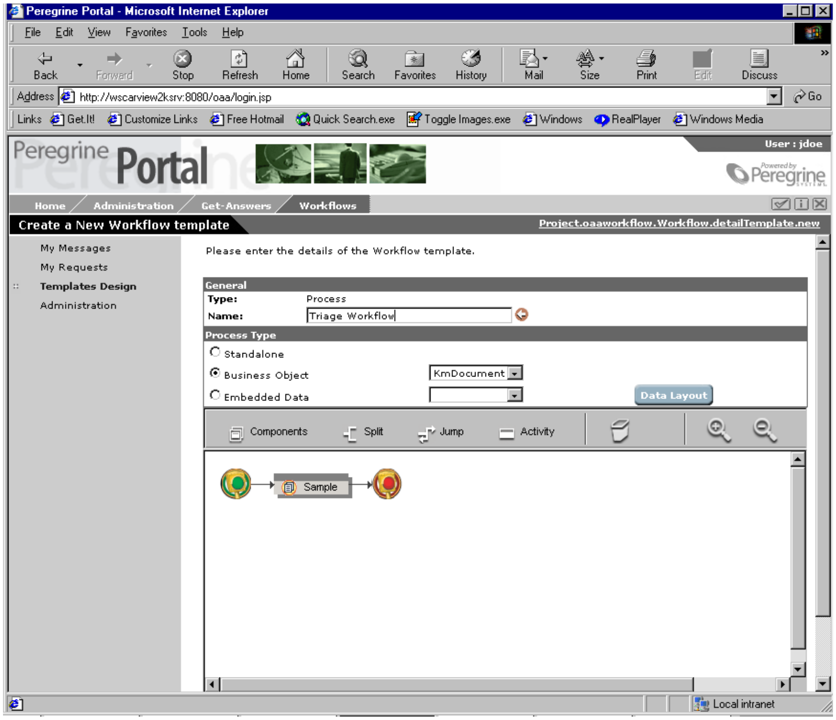
Task 3: A Document Team Owner can change the document and/or its metadata, and can view, add, and delete comments. In this third and final task in the workflow, the owner can reroute the document back to the editor in the first step in the editorial workflow, publish the document to one or more domain categories, transfer the document to a different Document Team, delete the document, or if the document was previously published, revert the document to its original state.

Creating the editorial workflow template

To create the editorial workflow template:

1. Click the **Workflows** tab.
2. Click **Templates Design** in the menu options.
3. Click the **New Process** button.
4. For Name, type **Editorial Workflow.**
5. For Business Object, select **KmDocument.**

6 Click on the **Sample** component between the green and red lights.


Peregrine Portal - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Size Print Edit Discuss
Address http://wscarview2ksrv:8080/oaa/login.jsp
Go
Links Get.It! Customize Links Free Hotmail Quick Search.exe Toggle Images.exe Windows RealPlayer Windows Media
Peregrine Portal
User : jdoe
Powered by Peregrine
Home Administration Get-Answers Workflows
My Messages
My Requests
Templates Design
Administration
Components Split Jump Activity
Sample
Local intranet

Create a New Workflow template

Project.oaaworkflow.Workflow.detailTemplate.new

Please enter the details of the Workflow template.

General

Type: Process

Name: Triage Workflow

Process Type

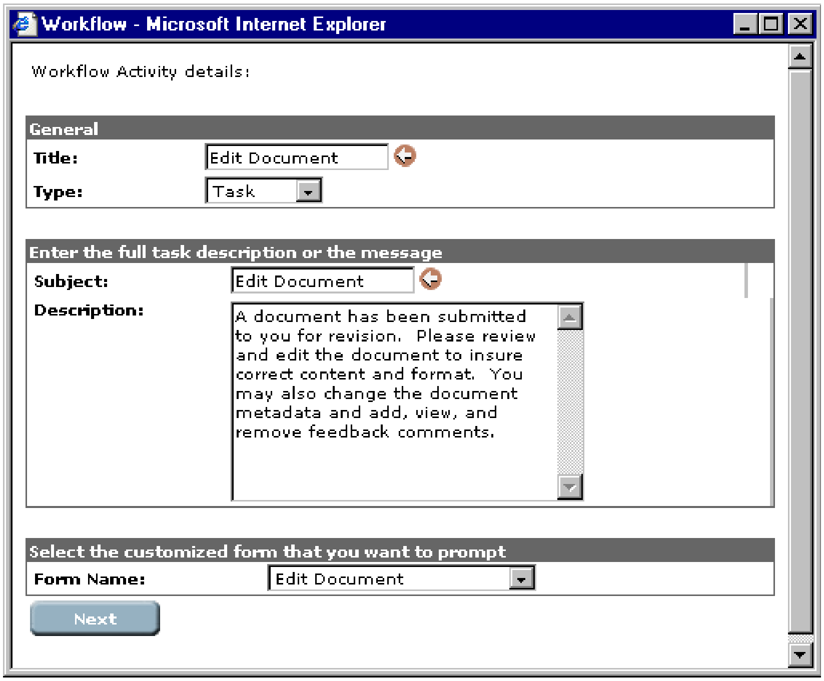
○ Standalone

● Business Object KmDocument

○ Embedded Data

Data Layout

A Workflow Activity details window displays.


Workflow - Microsoft Internet Explorer
Workflow Activity details:
General
Enter the full task description or the message
Select the customized form that you want to prompt
Next

Title: Edit Document

Type: Task

Subject: Edit Document

Description: A document has been submitted to you for revision. Please review and edit the document to insure correct content and format. You may also change the document metadata and add, view, and remove feedback comments.

Form Name: Edit Document

7 For Title, type **Edit Document**.

8 Set the Type to **Task**.

9 For Subject, type **Edit Document**.

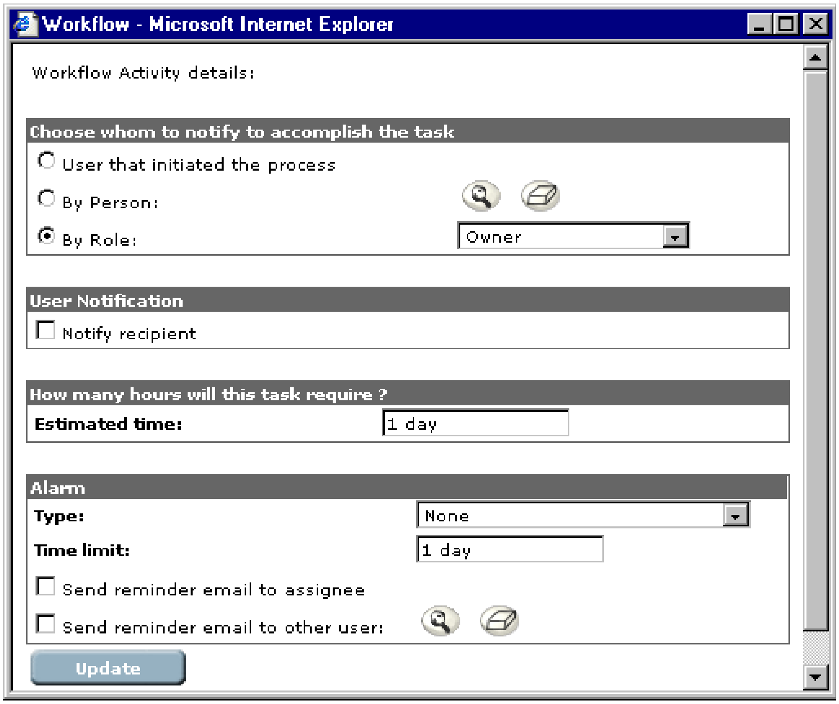
10 Enter the following description in the Description text box:

A document has been submitted to you for revision. Please review and edit the document to ensure correct content and format. You may also change the document metadata and add, view, and remove comments.

11 Set the Form Name to **Edit Document**.

12 Click the **Next** button.

The first window closes and a second Workflow Activity details window displays.



Workflow Activity details:

Choose whom to notify to accomplish the task

○ User that initiated the process

○ By Person:

● By Role: Owner

User Notification

☐ Notify recipient

How many hours will this task require ?

Estimated time: 1 day

Alarm

Type: None

Time limit: 1 day

☐ Send reminder email to assignee

☐ Send reminder email to other user:

13 Select **By Role** and from the pop-up menu, select **Editor**.

14 Set Estimated Time to **48 hours**.

15 Click **Update**.

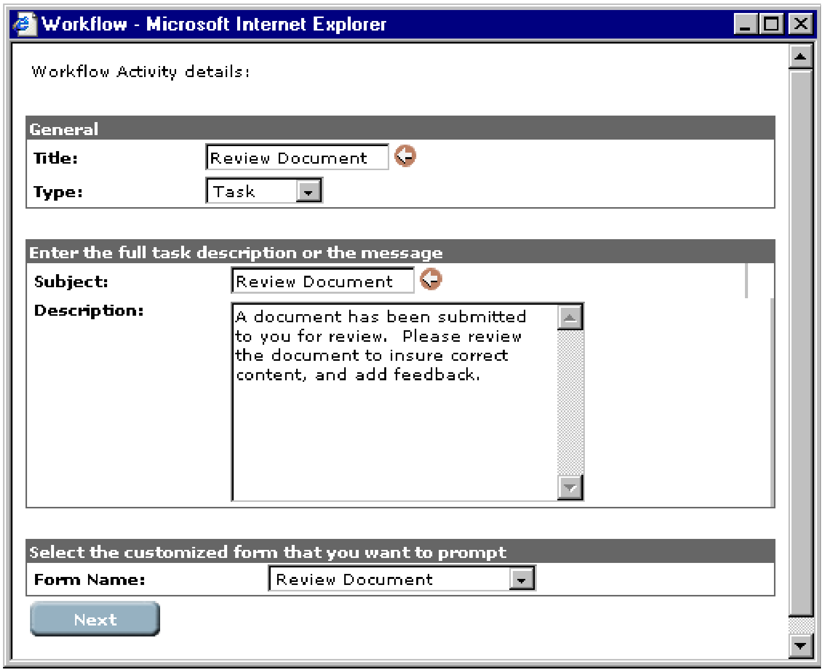
Adding the review document workflow activity

1 In the Editorial Workflow form, place your mouse cursor over the Activity icon above the Edit Document activity you just added.

2 Depress the left mouse button and drag the activity to the right side of the Edit Document activity. A red triangle will appear over the right side of the Edit Document activity.

3 Release the mouse button.

A Workflow Activity details window displays.



Workflow Activity details:

General

Title: Review Document

Type: Task

Enter the full task description or the message

Subject: Review Document

Description: A document has been submitted to you for review. Please review the document to insure correct content, and add feedback.

Select the customized form that you want to prompt

Form Name: Review Document

4 For Title, type **Review Document**.

5 Set the Type to **Task**.

6 For Subject, type **Review Document**.

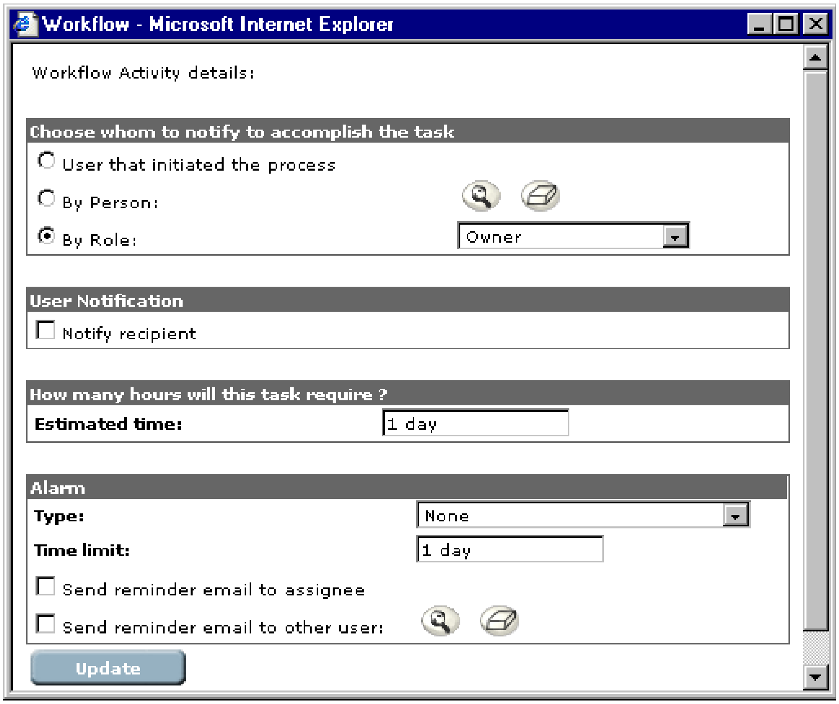
7 Enter the following description in the Description text box:

A document has been submitted to you for review. Please review the document to ensure correct content and to add comments.

8 Set the Form Name to **Review Document**.

9 Click the **Next** button.

The first window closes and a second Workflow Activity details window displays.



Workflow Activity details:

Choose whom to notify to accomplish the task

○ User that initiated the process

○ By Person:

● By Role: Owner

User Notification

☐ Notify recipient

How many hours will this task require ?

Estimated time: 1 day

Alarm

Type: None

Time limit: 1 day

☐ Send reminder email to assignee

☐ Send reminder email to other user:

10 Select **By Role** and from the pop-up menu, select **Reviewer**.

11 Set Estimated Time to **24 hours**.

12 Click the **Update** button.

The second window closes.

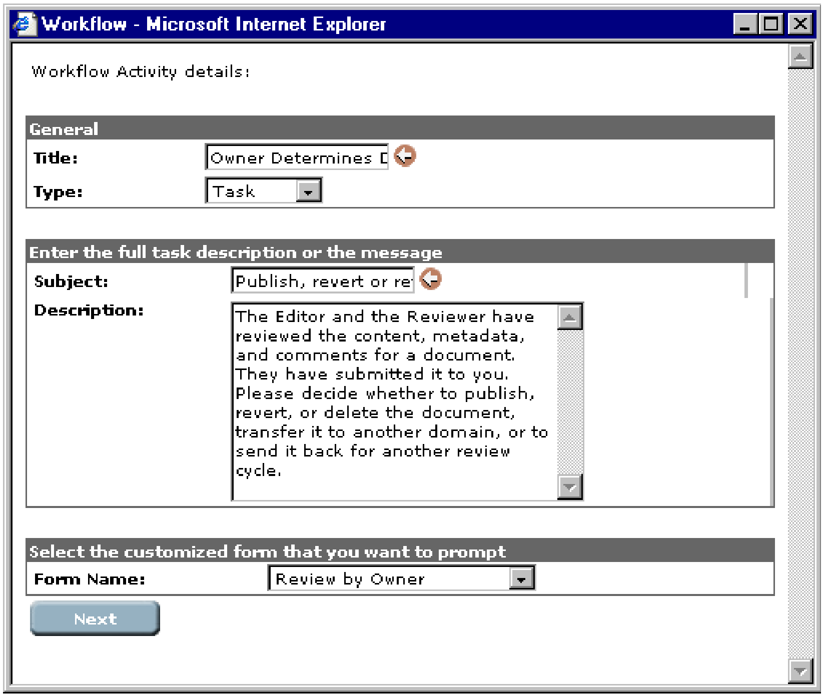
Adding the owner to determine document disposition

1 In the Editorial Workflow form, place your mouse cursor over the Activity icon above the Review Document activity you just added.

2 Depress the left mouse button and drag the activity to the right side of the Review Document activity. A red triangle will appear over the right side of the Review Document activity.

3 Release the mouse button.

A Workflow Activity details window displays.


Workflow - Microsoft Internet Explorer
Workflow Activity details:
General
Enter the full task description or the message
Select the customized form that you want to prompt
Next

Title: Owner Determines D

Type: Task

Subject: Publish, revert or re

Description: The Editor and the Reviewer have reviewed the content, metadata, and comments for a document. They have submitted it to you. Please decide whether to publish, revert, or delete the document, transfer it to another domain, or to send it back for another review cycle.

Form Name: Review by Owner

4 For Title, type **Owner Determines Document Disposition.**

5 Set the Type to **Task.**

6 Set Subject to **Publish, revert, or retire document**.

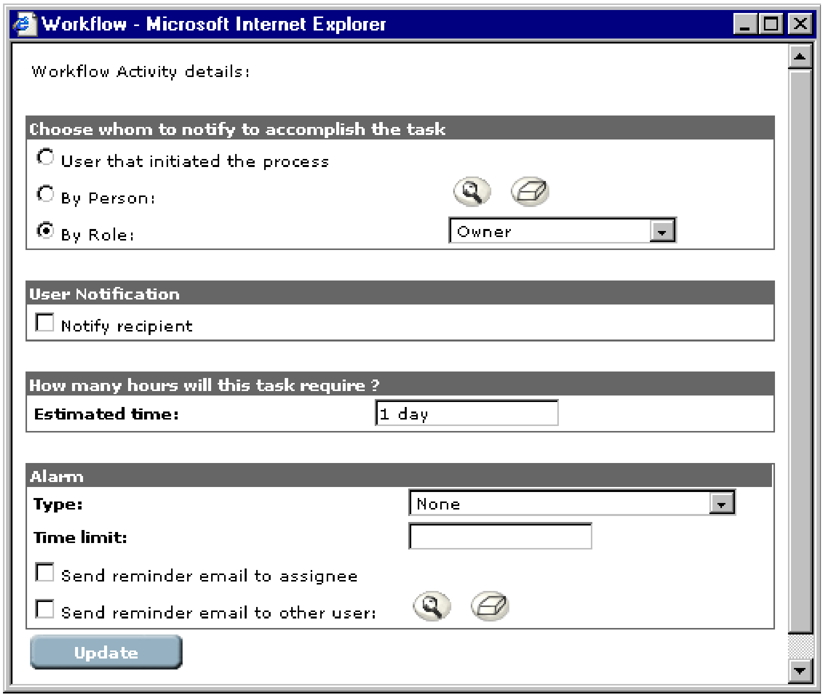
7 Enter the following description in the Description text box:

The Editor and Reviewer have reviewed the content, metadata, and comments for a document. They have submitted it to you. Please decide whether to publish, revert, or delete the document, transfer it to another domain, or send it back for another review cycle.

8 Set the Form Name to **Review by Owner**.

9 Click the **Next** button.

The first window closes and a second Workflow Activity details window displays.



Workflow - Microsoft Internet Explorer

Workflow Activity details:

Choose whom to notify to accomplish the task

○ User that initiated the process

○ By Person:

● By Role: Owner

User Notification

☐ Notify recipient

How many hours will this task require ?

Estimated time: 1 day

Alarm

Type: None

Time limit:

☐ Send reminder email to assignee

☐ Send reminder email to other user:

10 Select **By Role** and from the pop-up menu, select **Owner**.

11 Set Estimated Time to **1day**.

12 Click **Update**. The second window closes.

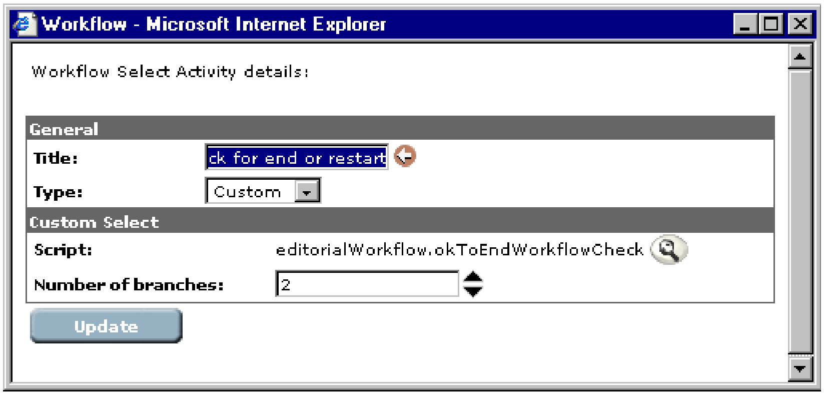
Creating a split (select activity)

1 In the Editorial Workflow form, place your mouse cursor over the Split icon next to the Jump and Activity controls.

2 Depress the left mouse button and drag the split control to the right side of the red light. A red triangle will appear over the right side of the red light.

3 Release the mouse button.

A Workflow Select Activity details window displays.



Workflow - Microsoft Internet Explorer

Workflow Select Activity details:

General

Title: ck for end or restart

Type: Custom

Custom Select

Script: editorialWorkflow.okToEndWorkflowCheck

Number of branches: 2

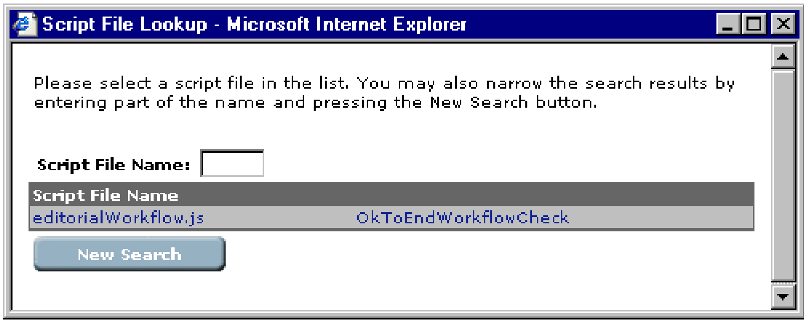
Update

1 For Title, enter **Check for end and restart**.

2 Set Type to **Custom**.

3 For the Number of branches, select **2**.

4 For Script, click the magnifying glass.



Script File Lookup - Microsoft Internet Explorer

Please select a script file in the list. You may also narrow the search results by entering part of the name and pressing the New Search button.

Script File Name:

Script File Name	
editorialWorkflow.js	OkToEndWorkflowCheck

New Search

5 Click **New Search** and navigate to the Editorial Workflow.js file at <presentation directory>\WEB-INF\apps\getanswers\jsscript\EditorialWorkflow.js.

Within this EditorialWorkflow.js javascript file is a function named OkToEndWorkflowCheck. This function returns a 0 if the top jump after the split is to be followed, and a 1 if the bottom jump after the split is to be followed. The owner form just before the split allows the owner to decide whether to return to the start of the Editorial Workflow and request that the Editor review the document again (0 jump) or end the workflow (1 jump).

If the New Search button does not work, do the following:

1. Run this sql in SQLPlus Worksheet signed in as user rome:

```
/*workflow needs this jsfile for the split in Editorial Workflow;        */
/*the editorialWorkflow.OkToEndWorkflowCheck() script        */
/*determines whether to go back to the start or to forward after the owner */
/*decision (and stop)     */

INSERT INTO "JSFILE" (LJSFILEID ,BIZDOCTYPE ,DESCRIPTION
,SCRIPTFILE ,SCRIPTFUNCTION ,GUID ,DTLASTMODIFY ) VALUES
(1 ,'rJSFile', 'OkToEndWorkflowCheck' ,'editorialWorkflow.js' ,'' ,'FDF31'
,16-FEB-2002' );
commit;
```

2. Copy the editorialworkflow.js file to a second location.

Keep the editorialworkflow.js file here in this first directory:
<presentation directory (usually oaa)>\WEB-INF\apps\getanswers\jscript\
and also copy the editorialworkflow.js file to this second directory:
<presentation directory (usually oaa)>\WEB-INF\apps\oaaworkflow\jscript\custom\.

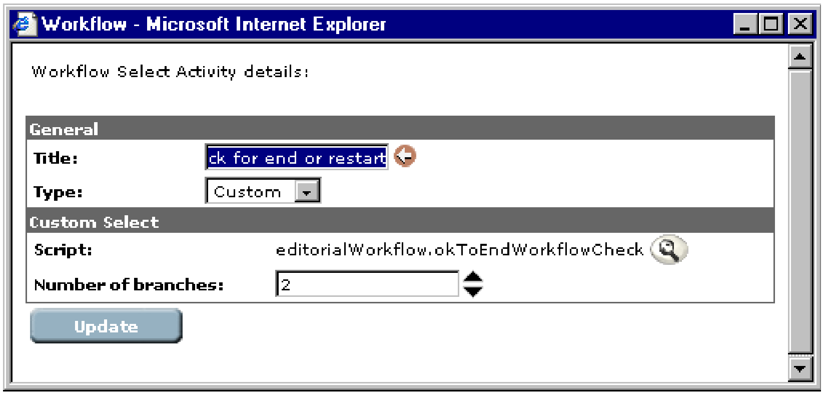
The custom directory may not exist under \WEB-INF\apps\oaaworkflow\jscript\ so please create the custom directory, if necessary.

The end result will be the same file in each directory:

<presentation directory>\WEB-INF\apps\getanswers\jscript\editorialworkflow.js

<presentation directory>\WEB-INF\apps\oaaworkflow\jscript\custom\editorialworkflow.js

You can do SQL insert and javascript file copy with any javascript file that will be consulted when a split occurs.



Workflow Select Activity details:

General

Title: ck for end or restart

Type: Custom

Custom Select

Script: editorialWorkflow.okToEndWorkflowCheck

Number of branches: 2

6 Click the Update button to save the split (select activity).

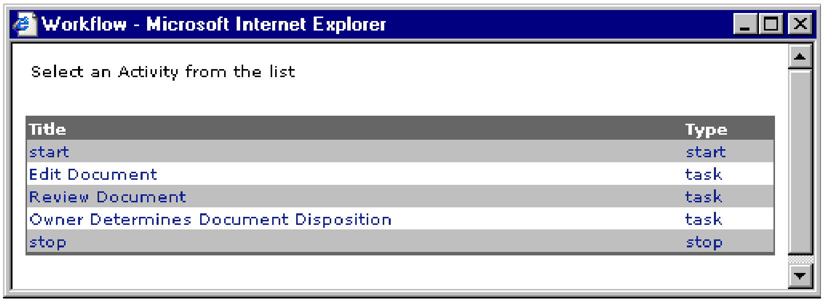
Creating two jumps to go to the start or the end

1 In the Editorial Workflow form, place your mouse cursor over the Jump icon next to the Split controls.

2 Depress the left mouse button and drag the jump control to the left side of the top (Check for end or restart / Task 1) activity to the right of the split. A red triangle will appear over the left side of the top (Check for end or restart / Task 1) activity to the right of the split.

3 Release the mouse button.

A Select an activity from the list window displays.



Select an Activity from the list

Title	Type
start	start
Edit Document	task
Review Document	task
Owner Determines Document Disposition	task
stop	stop

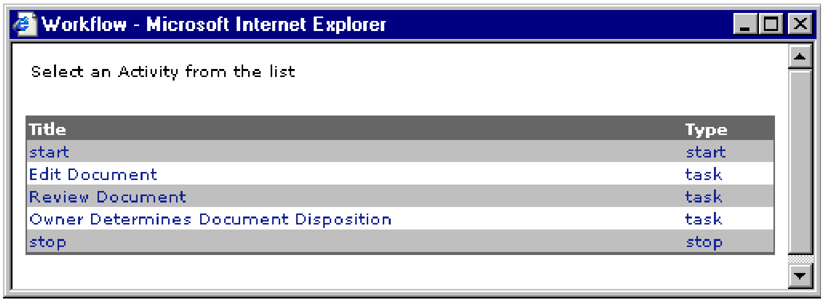
1 Select the **Edit Document** activity. This means the top jump after the split will loop back to the Edit Document activity.

2 Back on the Editorial Workflow form, place your mouse cursor over the Jump icon next to the Split controls.

3 Depress the left mouse button and drag the jump control to the left side of the bottom (Check for end or restart / Task 2) activity to the right of the split. A red triangle will appear over the left side of the bottom (Check for end or restart / Task 2) activity to the right of the split.

4 Release the mouse button.

A Select an activity from the list window displays.



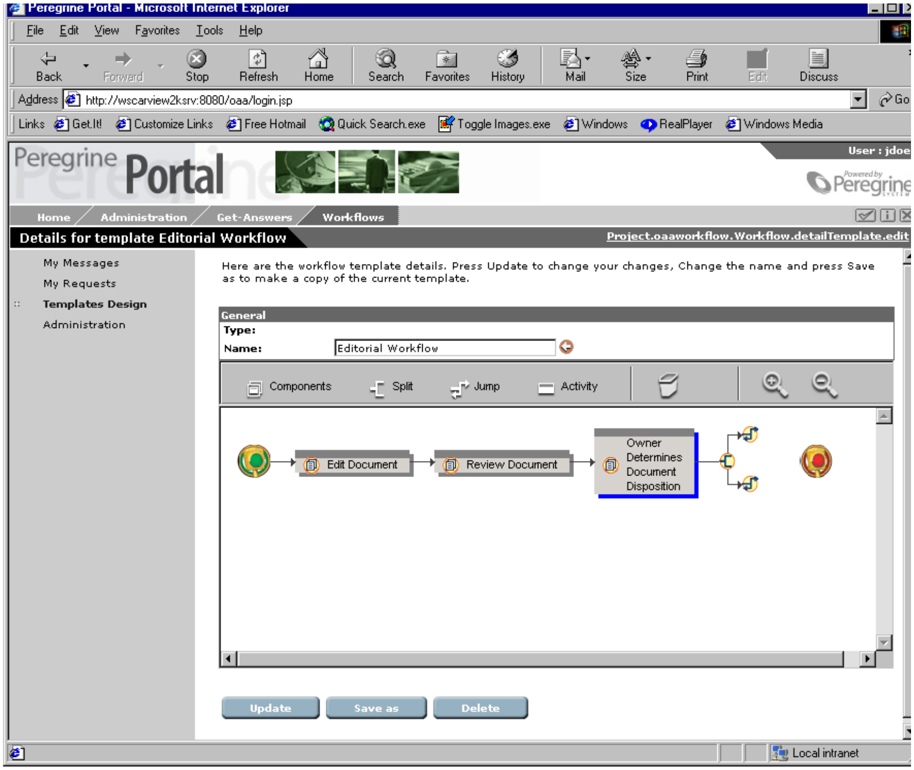
Select an Activity from the list

Title	Type
start	start
Edit Document	task
Review Document	task
Owner Determines Document Disposition	task
stop	stop

5 Select the **Stop** activity. This means the bottom jump after the split will end the Editorial Workflow by going to the ‘stop’ red light.

6 Drag the top **Check for end or restart / Task 1** activity to the trash bin on the control bar next to the Activity icon.

7 Drag the bottom **Check for end or restart / Task 2** activity to the trash bin on the control bar next to the Activity icon.


Peregrine Portal - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Size Print Edit Discuss
Address http://wscarview2ksrv:8080/oaa/login.jsp
Go
Links Get.It! Customize Links Free Hotmail Quick Search.exe Toggle Images.exe Windows RealPlayer Windows Media
Peregrine Portal
User : jdoe
Powered by Peregrine
Home Administration Get-Answers Workflows
Project.oaaworkflow.Workflow.detailTemplate.edit
My Messages
My Requests
Templates Design
Administration
Components Split Jump Activity
Edit Document
Review Document
Owner Determines Document Disposition
Update Save as Delete
Local intranet

Details for template Editorial Workflow

Here are the workflow template details. Press Update to change your changes, Change the name and press Save as to make a copy of the current template.

General

Type:

Name: Editorial Workflow

8 Back on the Details for template Editorial Workflow form, scroll down to the bottom and click **Create.**

You’ve just created the Editorial Workflow template.

4

CHAPTER

Using the Request List

Request list users view their request list through the My Requests component. This chapter provides information on how to view request definitions, start a new request workflow, and view overdue requests.

The topics in this chapter include:

Accessing My Requests on page 70.

Viewing Request Details on page 70.

Initiating a New Request on page 70.

Viewing Overdue Requests on page 71.

Accessing My Requests

Use the following procedure to access My Requests.

To access My Requests:

1. Log on to Get-Answers to display the **Navigation Menu** on your **Home** page.
2. Click the **Workflow** tab, or click **Workflow** on the **Navigation Menu**.

   The **Workflow** menu will display in the left pane and the **My Messages** page will display in the right pane.
3. In the left pane menu, click **My Requests** to display the My Requests page.

Viewing Request Details

Use the following procedure to view the details of a request.

To view the request details:

▶ Click any of the column entries for a request definition to display the request details page.

The **General** tab will display the general information about the request, the request description, and the request process history. The **Workflow** tab will display the workflow template used for this process instance.

Initiating a New Request

Use the following procedure to initiate a new request.

To initiate a new request:

1. From the **My Requests** page, click **New Request**.

   The **New Request** page is displayed.
2. Click on the request you want to initiate.

   The workflow process instance for the request is displayed in the request list of your **My Requests** page.

Viewing Overdue Requests

Use the following procedure to view overdue requests.

To view your overdue requests:

1. From the My Requests page, click My Overdue Requests.

   The **Overdue Request/Assignments** page will display your overdue requests.
2. If you want to view your team's overdue requests or assignments, select the appropriate option button.
3. Click **Perform Overdue Search.**

5 CHAPTER

Using Workflow Administration

The Administration function of Workflow provides the ability to start new process instances, monitor all process instances started in the system, update or delete process instances, view event errors, set up the request list, and upload java script files.

This chapter includes the following sections:

Accessing the Administration Function on page 74.

Monitoring Process Instances on page 74.

Updating a Process Instance on page 76.

Deleting a Process Instance on page 77.

Starting a New Process Instance on page 78.

Viewing Error Events on page 78.

Request List Setup on page 79.

Uploading JavaScript Files on page 83.

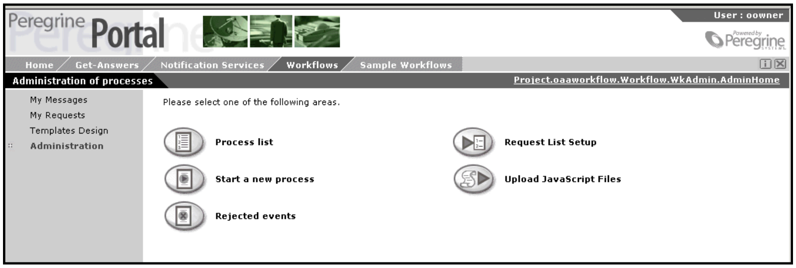
Accessing the Administration Function

The workflow administration functions can be accessed only by users having the required capabilities (permissions), such as an Administrator.

To access the Administration function:

1. Log on to Get-Answers to display the **Navigation Menu** on your **Home** page.
2. Click the **Workflows** tab, or click **Workflows** from the **Navigation Menu**.

   The **Workflows** menu will display in the left pane.
3. Click **Administration** from the **Workflows** left pane menu to display the **Administration of processes** page.


Peregrine Portal
User : oowner
Powered by Peregrine
Home
Get-Answers
Notification Services
Workflows
Sample Workflows
Administration of processes
Project.oaaworkflow.Workflow.WkAdmin.AdminHome
My Messages
My Requests
Templates Design
Administration
Process list
Start a new process
Rejected events
Request List Setup
Upload JavaScript Files

Please select one of the following areas.

From this page you can select the following areas of administration:

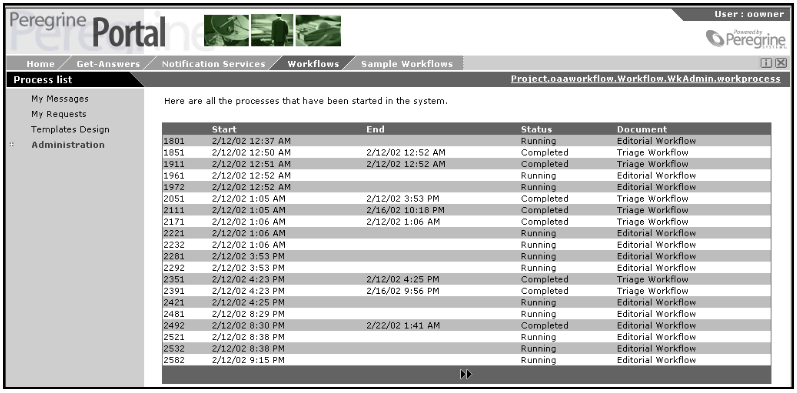
- Process list
- Start a new process
- Rejected events
- Request List Setup
- Upload JavaScript Files

Monitoring Process Instances

Using the **Process list** administration function, you can monitor the status of all process instances started in the system.

To view the process list:

1 From the **Administration of processes** page, click **Process list** to display the **Process list** page.


Peregrine Portal
User : oowner
Powered by Peregrine
Home
Get-Answers
Notification Services
Workflows
Sample Workflows
Process list
Project.oaaworkflow.Workflow.WkAdmin.workprocess
My Messages
My Requests
Templates Design
Administration

Here are all the processes that have been started in the system.

	Start	End	Status	Document
1801	2/12/02 12:37 AM		Running	Editorial Workflow
1851	2/12/02 12:50 AM	2/12/02 12:52 AM	Completed	Triage Workflow
1911	2/12/02 12:51 AM	2/12/02 12:52 AM	Completed	Triage Workflow
1961	2/12/02 12:52 AM		Running	Editorial Workflow
1972	2/12/02 12:52 AM		Running	Editorial Workflow
2051	2/12/02 1:05 AM	2/12/02 3:53 PM	Completed	Triage Workflow
2111	2/12/02 1:05 AM	2/16/02 10:18 PM	Completed	Triage Workflow
2171	2/12/02 1:06 AM	2/12/02 1:06 AM	Completed	Triage Workflow
2221	2/12/02 1:06 AM		Running	Editorial Workflow
2232	2/12/02 1:06 AM		Running	Editorial Workflow
2281	2/12/02 3:53 PM		Running	Editorial Workflow
2292	2/12/02 3:53 PM		Running	Editorial Workflow
2351	2/12/02 4:23 PM	2/12/02 4:25 PM	Completed	Triage Workflow
2391	2/12/02 4:23 PM	2/16/02 9:56 PM	Completed	Triage Workflow
2421	2/12/02 4:25 PM		Running	Editorial Workflow
2481	2/12/02 8:29 PM		Running	Editorial Workflow
2492	2/12/02 8:30 PM	2/22/02 1:41 AM	Completed	Editorial Workflow
2521	2/12/02 8:38 PM		Running	Editorial Workflow
2532	2/12/02 8:38 PM		Running	Editorial Workflow
2582	2/12/02 9:15 PM		Running	Editorial Workflow

A list of all processes started in the system is displayed. The list contains the following columns of information about the associated process instance:

Reference—The reference number assigned to the process instance.

Start—The date the process instance was started.

End—The date the process instance was completed.

Status—The current status of the process instance.

Document—A description of the process instance.

2 If you want to filter the list, from the **Status** drop-down list, select the process instance status to apply as the filter.

The status values are:

Timed out

Completed

Running

Error

3 To refresh the list, click **Refresh List.**

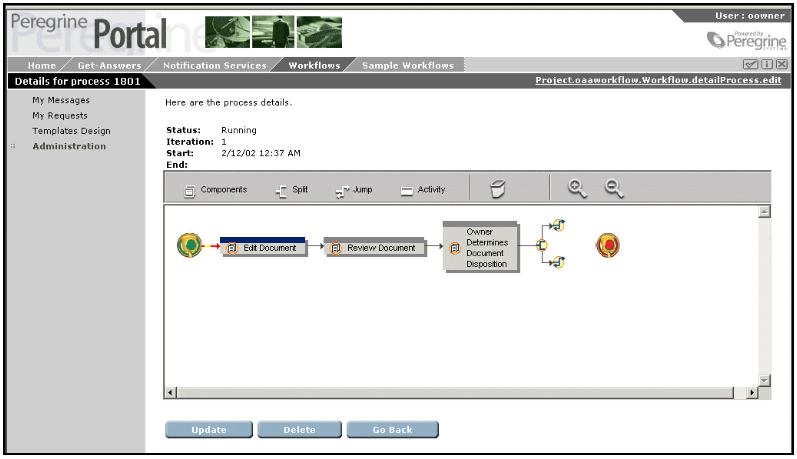
Updating a Process Instance

A process instance can be updated through the **Details for process** page. The most common reason to update a process instance is that an error has occurred during routing and the process instance has stopped.

Important: After you update a process instance because an error occurred, use the procedure in *Viewing Error Events* on page 78 to locate the process instance error and restart the process instance.

To update a process instance:

1. From the **Administration of processes** page, click **Process list** to display the **Process list** page.
2. If you want to filter the list, from the **Status** drop-down list, select the process instance status to apply as the filter.
3. To refresh the list, click **Refresh List.**
4. Use the process instance **Reference** number to locate the process instance you want to update.
5. Click the process instance to display the **Details for process** page for the selected process instance.


Peregrine Portal
User : oowner
Powered by Peregrine
Home
Get-Answers
Notification Services
Workflows
Sample Workflows
Details for process 1801
Project.oaaworkflow.Workflow.detailProcess.edit
My Messages
My Requests
Templates Design
Administration
Components
Split
Jump
Activity
Edit Document
Review Document
Owner Determines Document Disposition
Update
Delete
Go Back

Here are the process details.

Status: Running
Iteration: 1
Start: 2/12/02 12:37 AM
End:

6. Make the necessary changes to the process instance activities.

   Note: You cannot change a process instance activity that has already been processed.

7 Click **Update** to apply the changes and return to the **Process list** page.

Deleting a Process Instance

Projects and certain contracts are associated with a workflow process. When these projects or contracts are created, a workflow process instance is started. If a project or contract using a workflow process is deleted, the workflow process continues, delivering task messages to users on the system. These messages may be distributed not only to the user assigned a task, but also to all users with the same role.

After a project or contract is deleted, the process instance associated with the deleted project or contact must also be deleted.

To delete a process instance:

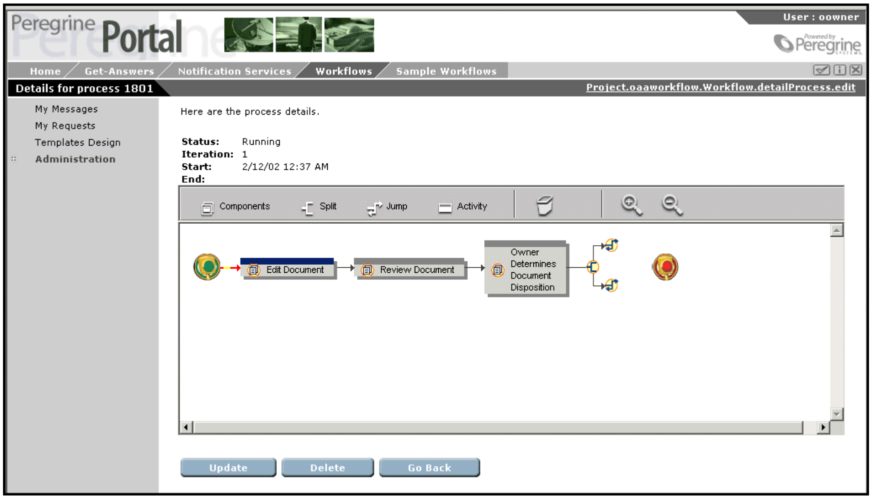
1 From the **Administration of processes** page, click **Process list** to display the **Process list** page.

2 If you want to filter the list, from the **Status** drop-down list, select the process instance status to apply as the filter.

3 Click **Refresh List** to refresh the list.

4 Use the process instance **Reference** number to locate the process instance you want to delete.

5 Click the process instance to display the **Details for process** page for the selected process instance.


Peregrine Portal
User : oowner
Powered by Peregrine Systems
Home
Get-Answers
Notification Services
Workflows
Sample Workflows
Details for process 1801
Project.oaaworkflow.Workflow.detailProcess.edit
My Messages
My Requests
Templates Design
Administration
Components
Split
Jump
Activity
Edit Document
Review Document
Owner Determines Document Disposition
Update
Delete
Go Back

Here are the process details.

Status: Running
Iteration: 1
Start: 2/12/02 12:37 AM
End:

6. Click **Delete** to delete the process instance and return to the **Process list** page.

Starting a New Process Instance

You can manually start processes that are not related to projects or contracts using the **Start a new process** administration function.

To start a process instance:

1. From the **Administration of processes** page, click **Start a new process** to display the **Browse process templates** page.
2. From the list of templates, select the template you want to use to start the workflow process.

   The **Process submit** page is displayed.
3. In the **Description** text box, type a description for the new process instance.
4. Click **Submit.**
5. The **Process submitted** page is displayed.

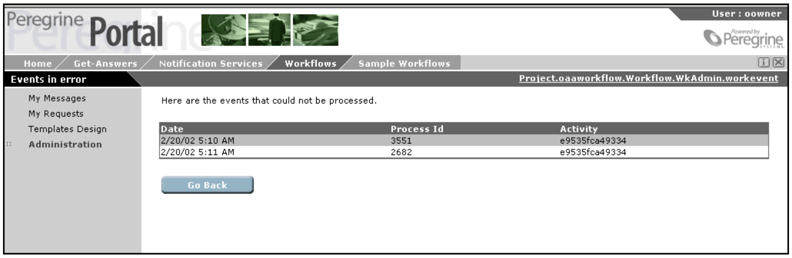
   The process number assigned to the new process will display in the **Process Information** frame. Note the process number.
6. Click **Continue** to return to the **Administration of processes** page.

Viewing Error Events

Using the Rejected events administration function, you can view a list of all workflow errors encountered and perform the necessary interventions.

To view errors:

1. From the **Administration of processes** page, click **Rejected events** to display the **Events in error** page.


Peregrine Portal
User : oowner
Powered by Peregrine
Home
Get-Answers
Notification Services
Workflows
Sample Workflows
Events in error
Project.oaaworkflow.Workflow.WkAdmin.workevent
My Messages
My Requests
Templates Design
Administration
Go Back

Here are the events that could not be processed.

Date	Process Id	Activity
2/20/02 5:10 AM	3551	e9535fca49334
2/20/02 5:11 AM	2682	e9535fca49334

A list of all event errors is displayed. The list contains the following columns of information about the event:

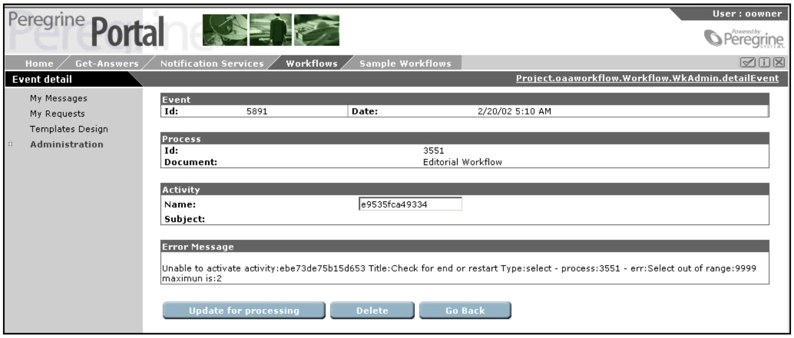
Date—The date the error occurred.

Process Id—The reference number assigned to the process instance.

Activity—The activity in error.

2 To view the details of an error event, click any of the column entries associated with that event.

The **Event detail** page is displayed.


Peregrine Portal
User : oowner
Powered by Peregrine
Home
Get-Answers
Notification Services
Workflows
Sample Workflows
Event detail
Project.oaaworkflow.Workflow.WkAdmin.detailEvent
My Messages
My Requests
Templates Design
Administration
Update for processing
Delete
Go Back

Event
Id: 5891
Date: 2/20/02 5:10 AM

Process
Id: 3551
Document: Editorial Workflow

Activity
Name: e9535fca49334
Subject:

Error Message
Unable to activate activity:ebe73de75b15d653 Title:Check for end or restart Type:select - process:3551 - err:Select out of range:9999 maximun is:2

3 After reviewing the error information, you can do one of the following:

- Click **Update for processing** to restart processing.
- Click **Delete** to delete the process.
- Click **Go Back** to return to the **Events in error** page.

Request List Setup

The Request List is a collection of request definitions that process a specified workflow template. A workflow template of any process type can be used for the request definition. However, when the process type is **Embedded Data**, the data is embedded in the workflow process. For example, a request list definition could be used to order business cards for employees, or to process change of address requests. When the workflow process type is **Embedded Data**, the employee information data is available to each workflow activity.

A request definition can be used to provide various request functions. However, you may need a programmer to write specific scripts that provide the functionality required by your request definitions.

After a request definition is created for the request list, a user who has the required capabilities can view the list and create new requests through **My Requests**. See *Using the Request List* on page 81

Searching for a Request Definition

The **WfwRequestList Search** page provides search functionality. You can search using the available text box. To narrow the search, provide as much information as possible.

To search for a request definition:

1. From the **Administration of processes** page, click **Request List Setup** to display the **WfwRequestList Search** page.
2. Type the request definition name in the **Name** text box.

   If you know part of the name, you can type it between % (percent) signs.
3. Click **Search** to filter the list of request definitions and display only those matching the search criteria.

   Note: You can sort the search results list by any of the displayed columns. To sort the list, click the column title.

The **WfwRequestList Search Results** page will display only the request definitions matching the search criteria. From the list, you can access the details for a request definition by selecting one of the column entries for a specific request definition. The **WfwRequestList Details** page will display the details for the selected user.

To view all request definitions defined in the system:

- Click **View All**.

To perform a new search:

- From the **WfwRequestList Search Results** page, click **New Search** to display the **WfwRequestList Search** page.

Setting Up a New Request Definition

Use the following procedures to define, modify, or delete request definitions.

To setup a request definition:

1. From the **Administration of processes** page, click **Request List Setup** to display the **WfwRequestList Search** page.
2. Click **New.**
3. The **Create New WfwRequestList** page is displayed.
4. Type a name for the request definition in the **Name** text box.
5. Type the path for the icon in the **Icon** text box.
6. Click the magnifier glass next to **Workflow Template** to display the **Lookup WorkTemplate** window.
   a. Use the **Type of Document Associated** text box to define the search criteria.
   b. Click **Search.**

      The **Lookup WorkTemplate** window will display a list of all workflow templates matching the search criteria.
   c. From the list, select the workflow template to associate with the request definition.
   d. Select the **Show Startup Screen** check box when the workflow template was created as an **Embedded Data** process type.

      See *Creating a Workflow Template* on page 28.
7. Click the magnifier glass next to **Startup Script** to display the **Script File Lookup** window.
8. Locate and select the script file you want to use.
9. To add a capability, type the capability in the **Capabilities required** text box.

   Important: The user must be assigned a role with that capability. You must also add the capability to the **Login Capabilities** text box on the **Person Details** page for each user you want to have access to the request definition.

10. Click **Submit Changes.**

Modifying Request Definitions

Request definitions can be modified through the **WfwRequestList Details** page.

To modify a request definition:

1. To search for the request definition you want to modify, see *Searching for a Request Definition* on page 80 for information on using the search function.
2. Select the request definition from the **WfwRequestList Search Results** page to display the **WfwRequestList Details** page.

   The **WfwRequestList Details** page will display the information for the selected request definition.
3. Make any changes to the request definition information.
4. Click **Submit Changes** to save all changes to the request definition information.

Deleting a Request Definition

Request definitions can be deleted from the system through the **WfwRequestList Details** page.

To delete a request definition:

1. To search for the request definition you want to delete, see *Searching for a Request Definition* on page 80 for information on using the search function.
2. Select the request definition from the **WfwRequestList Search Results** page to display the **WfwRequestList Details** page.

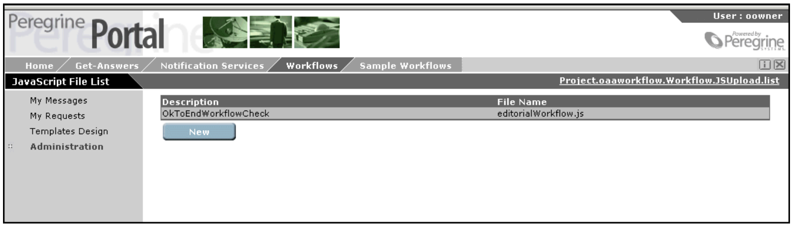
   The **WfwRequestList Details** page will display the information for the selected request definition.
3. Click **Delete.**

   A delete confirmation message is displayed.
4. Click **OK** to delete the request definition from the system.

Uploading JavaScript Files

To upload a java script file:

1 From the **Administration of processes** page, click **Upload JavaScript Files** to display the **List** page.


Peregrine Portal
User : oowner
Powered by Peregrine
Home
Get-Answers
Notification Services
Workflows
Sample Workflows
JavaScript File List
Project.oaaworkflow.Workflow.JSUpload.list
My Messages
My Requests
Templates Design
Administration
New

Description	File Name
OkToEndWorkflowCheck	editorialWorkflow.js

A list of all script files that have previously been uploaded to the server is displayed. The list contains the following columns of information about the script file:

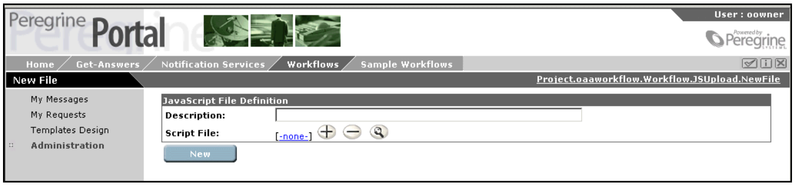
Description—A description of the script file function.

File Name—The name of the script file.

2 To view the script file details, click any of the column entries associated with the file.

To upload a new script file:

1 From the **List** page, click **New** to display the **New File** page.

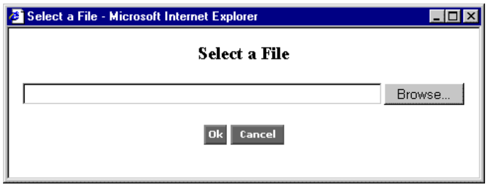

Peregrine Portal
User : oowner
Powered by Peregrine
Home
Get-Answers
Notification Services
Workflows
Sample Workflows
New File
Project.oaaworkflow.Workflow.JSUpload.NewFile
My Messages
My Requests
Templates Design
Administration
JavaScript File Definition
New

Description:

Script File: [-none-]

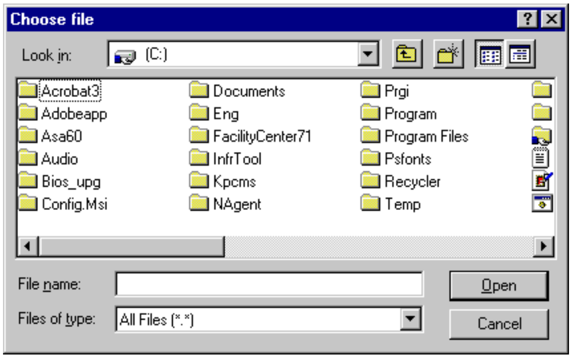
2 Type a description of the script file in the **Description** text box.

3 Click the **Plus** icon to display the **Select a File** window.


Select a File - Microsoft Internet Explorer
Browse...
Ok
Cancel

Select a File

4 Use the **Browse** button to display the **Choose File** window.


Choose file
Look in:
(C:)
Acrobat3
Adobeapp
Asa60
Audio
Bios_upg
Config.Msi
Documents
Eng
FacilityCenter71
InfrTool
Kpcms
NAgent
Prgi
Program
Program Files
Psfonts
Recycler
Temp
File name:
Files of type:
All Files (*.*)
Open
Cancel

5 Locate and select the script file to upload.

6 Click **OK**.

The **Script File** entry will display the selected file name.

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