



# **ALBPM WorkSpace Administrator Guide**

**Version: 6.0**

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# About This Help System

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The following functionality is available in this help system:

- **Table of Contents** - allows you to browse help in a categorical organization
- **Index** - allows you to browse a list of words or terms to find associated help
- **Glossary** - allows you to browse a list of defined words or terms
- **Expanding glossary text** - display as brown-underlined links in topics; click the link to display the definition for the linked word or term; the glossary definition displays in line as new (expanding), blue text; click the link again to hide the definition
- **Search** - allows you to search for any word or term in the help system

## Netscape Limitations

If you are using Netscape for your Web browser, the help system has the following limitations:

- The expanding glossary text is always displayed (there is no way to hide the definitions).
- The Forward and Back buttons do not work

## About WorkSpace Administrator

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WorkSpace Administrator lets process developers and system administrators customize how users interact with WorkSpace. A set of default views can be defined that determine how users see work items and applications. In addition, Work Item toolbars can be configured for each role in the organization, so that participants can only perform functions appropriate for their assigned roles.

# Launching WorkSpace Administrator

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WorkSpace Administrator can be launched from Administration Center, after the Web Server Application has been started.

To launch WorkSpace Administrator:

1. After launching **Administration Center**, do the following:
  - a) Click **Configuration**.
  - b) In the Configuration dialog box, click the **Web Server Application** tab.
  - c) Select **Start BEA AquaLogic BPM WorkSpace Administrator on Web Application startup**.
  - d) Click **OK**.
2. Click **Start Web Application Server**.
3. After the Web Application server loads, click **BEA AquaLogic BPM WorkSpace Administrator**.
4. When prompted, enter the **Username** and **Password** provided by your administrator.
5. Click **Login**. The WorkSpace Administrator window opens.

## Using the WorkSpace Administrator

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The WorkSpace Administrator window includes the following three tabs:

- **Views** - Click this tab to create and edit views. Views are used to display work items and applications in WorkSpace. You can specify how the items are displayed and sorted, and whether their labels are localized for other languages. When the Views tab is selected, a drop-down list appears that determines whether the left pane displays a list of the Default, Custom, or All views; when clicking a view, its settings are displayed in the right pane.
- **Presentations** - Click this tab to create and edit presentations. Presentations are definitions of column layouts that are used by views for displaying work items. When the Presentations tab is selected, a list of presentations is displayed in the left pane; when clicking a presentation, its settings are displayed in the right pane.
- **Toolbars** - Click this tab to customize the Work Item toolbar for each role, limiting the available functions as dictated by the needs for each role. When the Toolbars tab is selected, a list of roles is displayed in the left pane; when clicking a role, its Work Item toolbar is displayed in the right pane.

## Logging Out of WorkSpace Administrator

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To log out of the WorkSpace Administrator:

1. In the upper right of the WorkSpace Administrator window, click **Logout**.

## Creating Views

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Although users in WorkSpace can create custom views, a set of default views (Inbox, Applications, Attachments, Consultations, and History) is generally provided by process designers and system administrators. These default views are created in WorkSpace Administrator and can be of the following type:

- Displays work items for one or more process.
- Displays work items based on activity status.
- Contains child views.
- Displays applications for the user currently logged in.
- Displays work items containing attachments.

When creating views to display work items, the work items can be filtered based on their assigned roles, and whether they meet certain conditional criteria. You can also choose *how* the work items are displayed by specifying a *presentation*


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# Creating Instance Views

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To create an instances view:

1. Click the **Views** tab.
2. In the right pane, click the **Create View** button.
3. In the Custom Views dialog box, configure **View Properties**:
  - a) Set the **View Type** to **Instances**.
  - b) Type a name in the **View ID** box using only alphanumeric characters.
  - c) To display the view hierarchically under one of the existing views, select a view from the **Parent View** drop-down list. To display the view at the root level, set the drop-down list to blank.
  - d) Type a short description of the view in the **Description** box and select its **Language** from the drop-down list. The description will be used as the label for the view in the left pane of the WorkSpace window. To add additional languages for the label, click the plus icon and repeat.
  - e) At the bottom of the dialog box, click the **Next** button.
4. In the **Processes** section, select checkboxes for each of the processes you want to include in the view, and then click the **Next** button.
5. To choose the presentation that will be used for the view, select a presentation from the **Presentation Preview** drop-down list. A preview of the work item columns appears. Click the **Next** button.
6. To filter work items based on their role assignment, in the **Filter Options** section, configure the drop-down list for **Get work items assigned to**.

 **Note:** To include aborted or completed work items in the view, you must select **All** for this option.
7. In the Conditions section, add view conditions as necessary, and then click the **Next** button.
8. In the **Assigned Roles** section, select checkboxes for each of the roles that will use the view.
9. In the **View Properties** section, do the following:
  - a) To make the view hidden in the WorkSpace window, select **Is Hidden**.
  - b) To make it so users cannot edit the view, select **Is Read Only**.
  - c) Click the **Next** button.
10. To close the Custom Views dialog box, click the **OK** button.

# Creating Instance Activity Views

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1. Click the **Views** tab.
2. In the right pane, click the **Create View** button
3. In the Custom Views dialog box, configure **View Properties**
  - Set the **View Type** to **Instances activity**.
  - Type a name in the **View ID** box using only alphanumeric characters.
  - To display the view hierarchically under one of the existing views, select a view from the **Parent View** drop-down list. To display the view at the root level, set the drop-down list to blank.
  - Type a short description of the view in the **Description** box and select its **Language** from the drop-down list. The description will be used as the label for the view in the left pane of the WorkSpace window. To add additional languages for the label, click the plus icon and repeat.
  - At the bottom of the dialog box, click the **Next** button.
4. In the **Processes** section, select checkboxes for each of the processes you want to include in the view, and then click the **Next** button.
5. Set the **Activity** drop-down list to the activity you want the view to include, and then click the **Next** button.
6. To choose the presentation that will be used for the view, select a presentation from the **Presentation Preview** drop-down list. A preview of the work item columns appears. Click the **Next** button.
7. To filter work items based on their role assignment, in the **Filter Options** section, configure the drop-down list for **Get work items assigned to**

To include aborted or completed work items in the view, you must select **All** for this option
8. In the Conditions section, add view conditions as necessary, and then click the **Next** button.
9. In the **Assigned Roles** section, select checkboxes for each of the roles that will use the view.
10. In the **View Properties** section, do the following:
  - To make the view hidden in the WorkSpace window, select **Is Hidden**.
  - To make it so users cannot edit the view, select **Is Read Only**.
  - Click the **Next** button.
11. To close the Custom Views dialog box, click the **OK** button.

# Creating Folder Views

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To create a folder view:

1. Click the **Views** tab.
2. In the right pane, click the **Create View** button.
3. In the Custom Views dialog box, configure **View Properties**:
  - Set the **View Type** to **Folder**.
  - Type a name in the **View ID** box using only alphanumeric characters.
  - To display the view hierarchically under one of the existing views, select a view from the **Parent View** drop-down list. To display the view at the root level, set the drop-down list to blank.
  - Type a short description of the view in the **Description** box and select its **Language** from the drop-down list. The description will be used as the label for the view in the left pane of the WorkSpace window. To add additional languages for the label, click the plus icon and repeat.
  - At the bottom of the dialog box, click the **Next** button.
4. In the **Assigned Roles** section, select checkboxes for each of the roles you want to be able to use the view.
5. In the **View Properties** section, do the following:
  - To make the view hidden in the WorkSpace window, select **Is Hidden**.
  - To make it so users cannot edit the view, select **Is Read Only**.
  - Click the **Next** button.
6. To close the Custom Views dialog box, click the **OK** button.

## Creating Application Views

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To create an applications view:

1. Click the **Views** tab.
2. In the right pane, click the **Create View** button.
3. In the Custom Views dialog box, configure **View Properties**:
  - Set the **View Type** to **Application**.
  - Type a name in the **View ID** box using only alphanumeric characters.
  - To display the view hierarchically under one of the existing views, select a view from the **Parent View** drop-down list. To display the view at the root level, set the drop-down list to blank.
  - Type a short description of the view in the **Description** box and select its **Language** from the drop-down list. The description will be used as the label for the view in the left pane of the WorkSpace window. To add additional languages for the label, click the plus icon and repeat.
  - At the bottom of the dialog box, click the **Next** button.
4. In the **Processes** section, select checkboxes for each of the processes you want to include in the view.
5. In the **Assigned Roles** section, select checkboxes for each of the roles you want to be able to use the view.
6. In the **View Properties** section, do the following:
  - To make the view hidden in the WorkSpace window, select **Is Hidden**.
  - To make it so users cannot edit the view, select **Is Read Only**.
  - Click the **Next** button.
7. To close the Custom Views dialog box, click the **OK** button.

# Creating Attachment Views

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To create an attachments view:

1. Click the **Views** tab.
2. In the right pane, click the **Create View** button.
3. In the Custom Views dialog box, configure **View Properties**:
  - Set the **View Type** to **Attachments**.
  - Type a name in the **View ID** box using only alphanumeric characters.
  - To display the view hierarchically under one of the existing views, select a view from the **Parent View** drop-down list. To display the view at the root level, set the drop-down list to blank.
  - Type a short description of the view in the **Description** box and select its **Language** from the drop-down list. The description will be used as the label for the view in the left pane of the WorkSpace window. To add additional languages for the label, click the plus icon and repeat.
  - At the bottom of the dialog box, click the **Next** button.
4. In the **Processes** section, select checkboxes for each of the processes you want to include in the view, and then click the **Next** button.
5. In the **Assigned Roles** section, select checkboxes for each of the roles that will use the view.
6. In the **View Properties** section, do the following:
  - To make the view hidden in the WorkSpace window, select **Is Hidden**.
  - To make it so users cannot edit the view, select **Is Read Only**.
  - Click the **Next** button.
7. To close the Custom Views dialog box, click the **OK** button.

## Adding View Conditions

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Conditions allow you to filter the work items displayed by a view. For example, you can use conditions to retrieve work items received after a certain date, assigned to a certain participant, or with tasks in a particular state.

To add conditions to a view:

1. In the Create View dialog box or Edit View Dialog box, in the **Conditions** section, select **Match all of the following**.
2. To add a condition, select a condition from the **Add condition** drop-down list and then click the plus icon next to the drop-down.
3. Configure the variables for the condition. If you want the variables to be user-configurable when launching the view, select the **Parametric** option.
4. Repeat the previous steps to add additional conditions.
5. To remove a condition, click the minus icon next to the condition.
6. Click **Save**.

## Editing Views

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To edit a view:

1. Click the **Views** tab.
2. To specify the type of views that are displayed, in the left pane, set the drop-down list to **Default**, **Custom**, or **All**.
3. Click the presentation you want to edit.
4. In the right pane, make the necessary changes to the view.
5. Click **Save**.

## Deleting Views

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To delete a view:

1. Click the **Views** tab.
2. To specify the type of views that are displayed, in the left pane, set the drop-down list to **Default**, **Custom**, or **All**.
3. Click the presentation you want to delete.
4. In the right pane, click the **Delete View** button.
5. When prompted to confirm the deletion, click **OK**.

# Creating Presentations

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Presentations are definitions of column layouts that are used when viewing work items.

To create a presentation:

1. Click the **Presentations** tab.
2. In the right pane, click the **Create Presentation** button.
3. In the **Presentation** box, type a name for the presentation.
4. Add presentation columns
  - To add a presentation column, click a column in the **Available columns** list and click the right arrow button.
  - To remove a presentation column, click a column in the **Presentation columns** list and click the left arrow button.
  - To set the ordering of the presentation columns, click columns in the **Presentation columns** list and click the up/down arrow buttons.
  - To adjust the width of presentation columns, click a column in the **Presentation columns** list and type a number in the **Column size** box.
5. To add presentation sorting:
  - To add a sorting column, click a column in the **Presentation columns** list and click the down arrow button (above the **Presentation sorting** section).
  - To set the sorting order for the column, select from the drop-down list either **Ascending** or **Descending**.
  - To add additional sorting columns, repeat the previous steps. With multiple columns, sorting priority is given to the columns higher in the list.
  - To change the position of a sorting column in the list, click the up/down arrows for the column.
  - To remove a sorting column, click the trashcan icon next to the column.
6. Click **Save** . A preview of the presentation is displayed at the bottom of the window.

## Editing Presentations

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To edit a presentation:

1. Click the **Presentations** tab.
2. In the left pane, click the presentation you want to edit.
3. In the right pane, make changes to the **Presentation columns** and **Presentation sorting** as necessary.
4. Click **Save**. A preview of the presentation is displayed at the bottom of the window.

# Deleting Presentations

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To delete a presentation:

1. Click the **Presentations** tab.
2. In the left pane, click the presentation you want to delete. It is not possible to delete the default\_activity or default\_instances presentations.
3. In the right pane, click the **Delete Presentation** button.
4. When prompted to confirm the deletion, click **OK**.

## Configuring Role Toolbars

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WorkSpace includes a Work Item toolbar that lets users perform operations (such as send, abort, select, etc.) on one or more work items. In WorkSpace Administrator, the Work Item toolbars can be configured for each role in the organization, so that participants can only perform functions appropriate for their assigned roles.

To configure role toolbars:

1. Click the **Toolbars** tab.
2. In the left pane, click the role for which you will configure the toolbar.
3. In the right pane, select checkboxes for each function you want enable for the role.

Work Item Toolbar Button	Function
Send	Sends the work item to the next activity.
Sent To	Sends the work item to the next activity and assigns it a participant.
Abort	Terminates and deletes the work item.
Suspend	Pauses the work item at the current activity.
Resume	Resumes a suspended work item.
Select	Assigns the work item to the current user for that activity, thereby blocking other users from processing it.
Unselect	Removes the work item selection.
Back Instance	Returns a work item to the activity where an exception occurred, so that processing can continue from that point.
Grab	Sends a work item to a Grab activity, to remove it temporarily from its current activity.
Ungrab	Releases a work item from a Grab activity.
Bookmark	Bookmarks the work item so it can be recalled from the Bookmarks view.
Consultations	Sends a question about the work item to a participant.
Detail	Displays work item details.

4. Click **Save**.