

IBM ImagePlus
Workfolder Application Facility for AS/400



User's Guide for the Work Management Builder

Version 4 Release 1

IBM ImagePlus
Workfolder Application Facility for AS/400



User's Guide for the Work Management Builder

Version 4 Release 1

Note!

Before using this information and the product it supports, be sure to read the general information under "Notices" on page iii.

First Edition (September 1997)

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About This Book

This book describes how to install and use Work Management Builder, which is part of IBM ImagePlus Workfolder Application Facility for AS/400 (Workfolder Application Facility), which is a feature of the IBM ImagePlus VisualInfo for AS/400 (VisualInfo for AS/400) licensed program. You can use Work Management Builder to create a graphical representation of a work process, define workbaskets, and describe the actions that a user can perform. This book also explains how to install use the Work Management Builder online tutorial.

Work Management Builder lets you create work processes using a graphics-based editor instead of the character-based panels in Workfolder Application Facility. For more information on how Workfolder Application Facility uses action lists, workbaskets, and work processes, refer to the *IBM ImagePlus Workfolder Application Facility for AS/400: User's Guide*.

Who Should Use This Book

This book can help a system administrator or business process owner define work processes for Workfolder Application Facility on a workstation. It explains how to use the Work Management Builder and how it works with Workfolder Application Facility.

You should also be familiar with the following:

- IBM-compatible workstations
- IBM Operating System/2 (OS/2)
- Workfolder Application Facility work management concepts (refer to the *IBM ImagePlus Workfolder Application Facility for AS/400: Planning and Installation Guide* and the *IBM ImagePlus Workfolder Application Facility for AS/400: User's Guide*)

In addition, if you are installing Work Management Builder, you must be familiar with Personal Communications (PCOMM) and related workstation configurations.

How This Book Is Organized

This book contains the following information.

- Chapter 1, "Introducing Work Management Builder" on page 1 explains how Work Management Builder works with Workfolder Application Facility. It also describes how to design a work process.
- Chapter 2, "Installing Work Management Builder" on page 7 provides step-by-step instructions for installing Work Management Builder and also explains how to delete it.
- Chapter 3, "Getting Started" on page 19 explains the basic components of Work Management Builder windows, how to open and close Work Management Builder,

and how to log on and off Workfolder Application Facility from within Work Management Builder.

- Chapter 4, “Using Work Management Builder Objects” on page 26 describes different ways to work with objects in Work Management Builder container windows, including opening objects, copying objects, and checking objects in and out of Workfolder Application Facility.
- Chapter 5, “Working with Action Lists” on page 36 explains how to create action lists and how to work with existing action lists.
- Chapter 6, “Working with Workbaskets” on page 42 explains how to create workbaskets and how to work with existing workbaskets.
- Chapter 7, “Working with Work Processes” on page 51 explains how to create work processes and how to work with existing work processes.
- Chapter 8, “Using the Work Process Window” on page 56 explains how to use the work process editor to create a graphical representation of a work process.
- Appendix A, “Using the Work Management Builder Tutorial” on page 89 explains how to use the Work Management Builder online tutorial.
- Appendix B, “Defining Function Keys and Options” on page 97 describes the function keys and options available for index and work action lists.

Where to Find More Information

The following IBM documents contain information that you might find helpful when using VisuallInfo for AS/400.

For a list of other related publications, see “Bibliography” on page 100. Request copies of IBM publications from your IBM representative or from the IBM branch office serving your area.

IBM ImagePlus VisuallInfo for AS/400

When you order VisuallInfo for AS/400, you receive the following printed publications as part of the VisuallInfo for AS/400 license.

- *IBM ImagePlus VisuallInfo: Client for Windows User's Guide*, SC31-9052
- *IBM ImagePlus VisuallInfo for AS/400: Licensing Information*, GC34-4589
- *IBM ImagePlus VisuallInfo for AS/400: Planning and Installation Guide*, GC34-4585
- *IBM ImagePlus VisuallInfo for AS/400: System Administration Guide*, GC34-4583

The remaining books are shipped in softcopy format only.

- *IBM ImagePlus VisuallInfo: Messages and Codes*, SC31-9065
- *IBM ImagePlus VisuallInfo for AS/400: Application Programming Guide and Reference*, SC34-4586

IBM ImagePlus Workfolder Application Facility for AS/400

When you order the Workfolder Application Facility feature of VisualInfo for AS/400, you also receive the following printed publications.

- *IBM ImagePlus Workfolder Application Facility for AS/400: Planning and Installation Guide*, GC34-4624
- *IBM ImagePlus Workfolder Application Facility for AS/400: System Administration Guide*, GC34-4625

The remaining books are shipped in softcopy format only.

- *IBM ImagePlus Workfolder Application Facility for AS/400: Designing a Work Process*, SC34-4588
- *IBM ImagePlus Workfolder Application Facility for AS/400: Programming Interfaces Guide*, SC34-4590
- *IBM ImagePlus Workfolder Application Facility for AS/400: User's Guide*, SC34-4584
- *IBM ImagePlus Workfolder Application Facility for AS/400: User's Guide for the Work Management Builder*, SC34-4587

About the Softcopy Document Library

In addition to the printed books you receive as part of the VisualInfo for AS/400 product, the entire document library is available in softcopy. Shipped on a separate document tape or CD-ROM, the library includes books for the Workfolder Application Facility feature. You can also purchase printed copies of any book in the library.

The library is available in the following formats:

- Portable document format (PDF)
- Hypertext markup language (HTML)

Before you can view or print PDF and HTML documents, follow the installation instructions in either the *IBM ImagePlus VisualInfo for AS/400: Planning and Installation Guide* or *IBM ImagePlus Workfolder Application Facility for AS/400: Planning and Installation Guide*.

PDF Files

Using PDF files, you can easily view documents online, as well as select one or more pages that you want to print.

To view PDF documents, you must have a Web browser and the Adobe Acrobat Reader. If you do not already have this tool, you can obtain it free by following the instructions for download from the Adobe home page:

<http://www.adobe.com/prodindex/acrobat/readstep.html>

A variety of national language readers are also available.

Using the Adobe Acrobat Reader, you can do the following:

- View documents that resemble printed pages.

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- Use the text search capability by selecting **Find** from the **Tools** pull-down menu.
- Easily print a single page, a range of pages, or an entire document.
- Customize page size, graphics, fonts, and font sizes.

To view or print books from PDF files using the Adobe Acrobat Reader, follow these steps.

1. Start the Adobe Acrobat Reader.
2. Select **Open** from the **File** pull-down menu.
3. Select the location where you installed the document library.
4. Select the book you want to view.

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Using HTML files, you can use a Web browser of your choice to view and print HTML books. These resemble printed books yet provide convenient HTML links to help you navigate through the information.

To view or print books from HTML files, follow these steps.

1. Start your Web browser.
2. Select the **Open** or **Open file** choice (usually from the **File** pull-down menu).
3. Select the location where you installed the document library.
4. Select the book you want to view.

BookManager Files

BookManager files for the VisualInfo for AS/400 document library will be available in the first half of 1998 on CD-ROM as part of the AS/400 softcopy collection kit. To view or print books using BookManager, refer to the books that accompany your softcopy collection kit.

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Chapter 1. Introducing Work Management Builder

Work Management Builder is part of the IBM ImagePlus Workfolder Application Facility for AS/400 (Workfolder Application Facility) feature of the IBM ImagePlus VisualInfo for AS/400 (VisualInfo for AS/400) licensed program. Work Management Builder lets you use a workstation to create a graphical representation of a work process and define the workbaskets and action lists that support it.

Workfolder Application Facility is an interactive program that lets you enter and work with document images and manage the flow of work. You can use the graphical user interface (GUI) of Work Management Builder instead of the Workfolder Application Facility character-based panels to create a work process and integrate it into the flow of work.

Understanding Work Management

Most business operations can be characterized as a set of interrelated processes. Work flows from one employee to another, and from one department to another. Some simple processes might require only a few steps, while more complex processes involve a number of employees in different departments.

Work management lets you move work through a process, gather documents at collection points, and monitor work throughout the process. For example, a mortgage loan company receives large volumes of loan applications in the mail. During the approval process, the company receives follow-up documents such as credit reports and appraisals. Employees spend several hours each day opening, sorting, filing, and monitoring applications, as well as collecting pertinent documents for final approval.

Documents are moved from one employee to another as they are received and checked. As the loan package is completed, it might be handled by employees in more than one department.

Understanding Work Processes

As in the mortgage loan company example, most enterprises that handle documents perform some or all of the following tasks:

- File documents for later retrieval
- Collect documents, forms, and information from different sources, then deliver these documents somewhere to be processed
- Match incoming mail with documents currently being processed
- Hold some work until another department or group is finished with its part of the work.

A *work process* represents the flow of work in Workfolder Application Facility. It describes the actions that can be performed on a group of one or more documents and the path that this group takes through the work management process.

A work process reflects work the way that it is performed, with a clearly defined scope and boundaries. It defines the sequence of activities and tasks, and the connections and relationships among those activities and tasks. A work process determines the criteria that are used to make decisions on the flow of work and the points at which those decisions are made.

Planning a Work Process

Before you begin to define a work process, you must determine the work that your business performs, in addition to where and how it is performed.

What is the final product? The final product might be the result of all the work accomplished by your business, by one department in your business, or by certain employees from different departments. For example, the final product of the mortgage loan company is the letter sent to the applicant approving or rejecting the loan application.

Analyze the information that must be processed to produce the final product, determine the actions that must be performed and where they are performed, and decide how you want the information to flow through the work management process.

Information to be Processed

Consider the information that must be handled. What types of input support the final product? What are the specific documents that must be processed?

A *work package* consists of zero or more documents that can be moved together from one place to another in a work process. For example, a mortgage loan company initially receives loan applications and later receives follow-up documents, such as credit reports and appraisals. These documents form the work package.

How Information is Handled

Who can best handle each step of the process? For example, a loan officer might verify that a loan application is complete, then file the application until a certain document is received from the applicant. When the document arrives, the loan officer might be responsible for matching the document with the application, as well as for processing that document.

The loan applications could be grouped in a *workbasket* that is accessible to a number of loan officers. A workbasket is a point in the process where work packages are handled. Workbaskets could be defined within the work process to handle each part of the loan process, such as credit reports and home appraisals.

For more information on using workbaskets, see Chapter 6, "Working with Workbaskets" on page 42.

Actions to be Taken

Consider what actions must be taken on the contents of a workbasket. For example, a loan officer can accept an application or reject it as incomplete. An *action list* defines the actions that a user can perform on the work package. An action list can describe the following:

- Predefined function keys
- Customer-defined function keys
- Selectable options that are available to the user

Depending on whether an application meets the initial credit requirements, a loan officer could select one predefined function key to continue the application through the work process, or another function key to reject the application (for example, F2 to accept or F8 to reject).

When a user works with a workbasket in Workfolder Application Facility, only those actions that you have previously defined for the work package at the workbasket are available.

For more information on using action lists, see Chapter 5, “Working with Action Lists” on page 36.

How Information Flows Through the Process

Consider how you want information to flow through your process. For example, when is the initial loan application reviewed? What supporting documents are needed to move on to the next step in the process? What criteria determine whether an application is accepted or rejected? This flow of information is the basis of your work process, which defines the way users perform their work. A work process consists of decision points, collection points, and the paths that guide the work throughout processing.

Where does the input originate? Your work process must begin at some point. In the mortgage loan company, the loan application, submitted by the applicant, is the document that starts the work process.

Decision points determine the path of the work based on a set of values you specify. For example, a loan application can be rejected if the applicant's salary is insufficient. Collection points manage work packages that need to wait for additional documents, the completion of another action, or the occurrence of business events. For example, the loan application cannot be approved or rejected until the credit report is received and processed.

One decision point in the mortgage loan example might move an application to a collection point to wait for credit reports and appraisals. You can assign time guidelines to the collection points to wait for documents and continue them along the path when they arrive, or signal that a document has not been received. For example, if a credit report is valid for a certain length of time, the collection point might wait that length of time for other supporting documents, such as a home appraisal, after it receives a credit report.

Processes within a workbasket can continue along parallel paths to several collection points at one time. In this way, documents that arrive at different times do not affect other parts of the path.

When all of the documents are received, the work package can continue along the path to a final point— for example, loan approval.

For more information on defining work processes, see Chapter 7, “Working with Work Processes” on page 51.

How Everything Fits Together

After you analyze the information that you want to process, determine the actions that you want to perform, and decide how you want the information to flow through the work management process, you are ready to create a *work process diagram*, which is the graphical representation of your work process.

A work process diagram shows how work moves through the various activities in the process, noting what tasks the activity involves. It describes the flow, the main elements, and the key measuring points of a work process.

The work process diagram in Figure 1 shows how information might flow through a mortgage loan company.

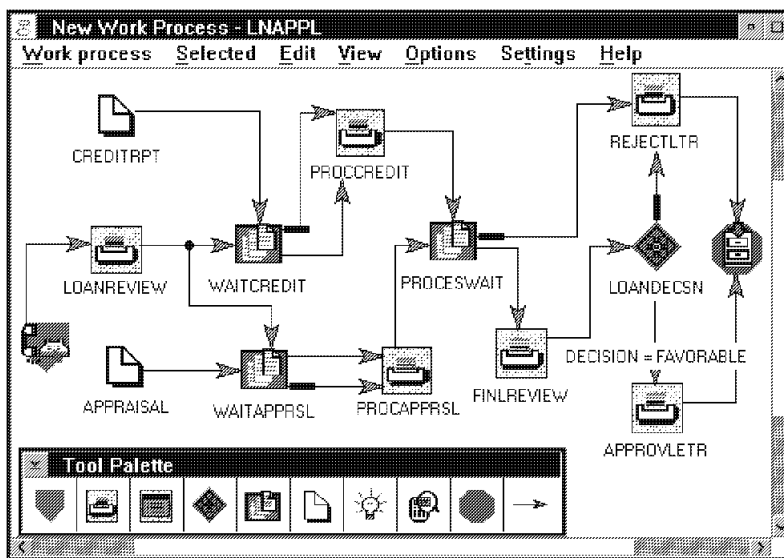


Figure 1. Sample Work Process Diagram

Each symbol in the work process diagram represents a point at which work is done, documents are collected, or decisions are made. A mortgage loan application must be reviewed, supporting documentation must be collected, and the application must be approved or rejected, depending on certain criteria.

Each symbol also has information associated with it, which can describe the work that is done, the information that is collected, or the decisions that are made.

For information on using the work process editor to create a work process diagram, see Chapter 8, “Using the Work Process Window” on page 56.

How Workfolder Application Facility Uses the Work Process

You can use Work Management Builder to create action lists, workbaskets, and work processes. However, you must log on to Workfolder Application Facility and check in any new or updated action lists, workbaskets, and work processes before Workfolder Application Facility can use them. The new or updated data then becomes part of the Workfolder Application Facility database.

When you *check in* an action list, workbasket, or work process, you permanently store the new or updated data associated with it on Workfolder Application Facility. When you *check out* an action list, workbasket, or work process, Work Management Builder queries Workfolder Application Facility, stores a copy of the data on your workstation, and prevents anyone else from updating it.

Although you can use Work Management Builder to build action lists, workbaskets, and work processes, you cannot use Work Management Builder to run the work process. You must run the work process you create with Work Management Builder on Workfolder Application Facility.

Learning about Work Management Builder

This book provides a task-oriented approach to creating and working with action lists, workbaskets, and work processes. In Work Management Builder windows, these action lists, workbaskets, and work processes are called *objects*, and are represented by icons.

Use Chapter 4, “Using Work Management Builder Objects” on page 26 to get an overview of the actions that you can perform on Work Management Builder objects. Then read Chapter 5, “Working with Action Lists” on page 36, through Chapter 7, “Working with Work Processes” on page 51 for a detailed description of creating and working with action lists, workbaskets, and work processes, including an explanation of the choices that you can make on different windows. Chapter 8, “Using the Work Process Window” on page 56 explains how to use the work process editor to create your work process diagram.

Before you begin working with Work Management Builder, you can complete the Work Management Builder tutorial if it is installed on your workstation. This online tool lets you read about Work Management Builder functions and then try the steps necessary to perform the functions.

For a complete description of the Work Management Builder tutorial, see Appendix A, “Using the Work Management Builder Tutorial” on page 89. For instructions on installing the tutorial if it is not already installed on your workstation, see Chapter 2, “Installing Work Management Builder” on page 7.

Context-sensitive online help is always available with Work Management Builder. The type of help that is displayed is determined by what you select before you request help or what task you are doing when you request help.

Chapter 2. Installing Work Management Builder

This chapter explains how to install and configure Work Management Builder. You can install only Work Management Builder or Work Management Builder and the Work Management Builder tutorial on your workstation. You can use the installation utility to either install or delete (uninstall) Work Management Builder.

The installation utility guides you step by step through the installation process. The utility prompts for input, such as the names of the disk drives and directories where you want Work Management Builder software installed. In addition, online help is always available. To display context-sensitive help, press F1 or click on the **Help** push button in a window.

Who Should Install Work Management Builder

To install Work Management Builder, you must understand the communications, hardware, software, and storage prerequisites for Work Management Builder. You are expected to be familiar with installing hardware and software on a workstation that is used as part of a network with connections to an AS/400 host computer with Workfolder Application Facility installed. You must also be familiar with Operating System/2 (OS/2) installation, configuration, and terminology.

In addition, you are expected to be familiar with Workfolder Application Facility requirements of your enterprise and your communications configuration.

Hardware and Software Requirements

You must have an IBM-compatible workstation capable of running OS/2 with the following:

- 10MB available disk space (20MB available disk space is recommended for a large database)
- 4MB random access memory (RAM) above existing OS/2 memory requirements (additional RAM is recommended for increased performance)
- 1.44MB diskette drive (3.5-inch)
- Any IBM color or monochrome display supported that the workstation and OS/2 supports
- An OS/2-supported mouse
- Any OS/2-supported printer or plotter
- IBM Token-Ring Network 16/4 Adapter/A or higher

You must have OS/2 installed on your workstation. Personal Communications (PCOMM) must be configured for **APPC with 5250 Work Station Feature over IBM Token-Ring Network**. Also, PCOMM must be running before you begin the installation.

In addition, you must be connected to an AS/400 host system operating Workfolder Application Facility to run Work Management Builder.

Double-Byte Character Set Work Management Builder Users

If you have a double-byte character set version of Workfolder Application Facility installed and plan to install Work Management Builder, follow these steps before installation:

1. Select option 3, Administrative Processing, from the Workfolder Application Facility main menu, EKD000.
2. Select option 5, Update Profiles, from menu EKD300.
3. Select option 5, Action Lists, from menu EKD330.
4. Select option 9, Change=9, next to the *MANAGE action list.
5. Press **Enter**.
6. Press the **PageDown** key.
7. Customize the prompt information for the following option line of the *MANAGE action list profile:

Screen Prompt	Function Code	Description
50 = User-defined option	0050	User-defined option

8. Press **Enter**. You receive the following Workfolder Application Facility message:
EKD7555 - Action list profile changed successfully
9. Press **F3=Exit**.

Before You Begin Installing Work Management Builder

Before you begin installation, you must be familiar with the OS/2 communications configuration of your workstation and your connection to an AS/400 host computer with Workfolder Application Facility installed. For example, you need to know the partner logical unit (PLU) alias used to reference the AS/400 host system. You also need to be familiar with Personal Communications (PCOMM) and Advanced Program-to-Program Communications (APPC) with 5250 emulation.

Use Table 1 on page 9 to help you gather the information you need before you begin the installation process. You might need to contact your local area network (LAN) administrator for PCOMM information and the AS/400 system administrator for Operating System/400 (OS/400) information.

<i>Table 1. Installation Information</i>	
Information Needed	Your Information
Directory where you want to install Work Management Builder—for example, C:\EHLWAF	
Directory where you want to install Work Management Builder database files—for example, C:\EHLWAF\WORK	
Partner logical unit (PLU) alias (nickname) that is assigned to your AS/400 system	
Name of the program library that was specified when Workfolder Application Facility was installed—for example, EKDLIB	
Language-specific codepage that your AS/400 system is set to—for example, 037	

Installing the Basic Product and Tutorial

To install only the basic Work Management Builder feature or both Work Management Builder and the Work Management Builder tutorial, do the following:

1. Make sure that PCOMM is running.
2. From the OS/2 desktop, switch to or start an OS/2 window or OS/2 full-screen session.
3. Make sure that the OS/2 date and time values are correct.
4. Insert Work Management Builder Installation Diskette 1 in your workstation diskette drive.
5. At the OS/2 prompt, type **A:\INSTALL** and press Enter. You see the Work Management Builder Installation window shown in Figure 2 on page 10. The Welcome window is also displayed. The Welcome window contains information you should read before you continue with the installation.

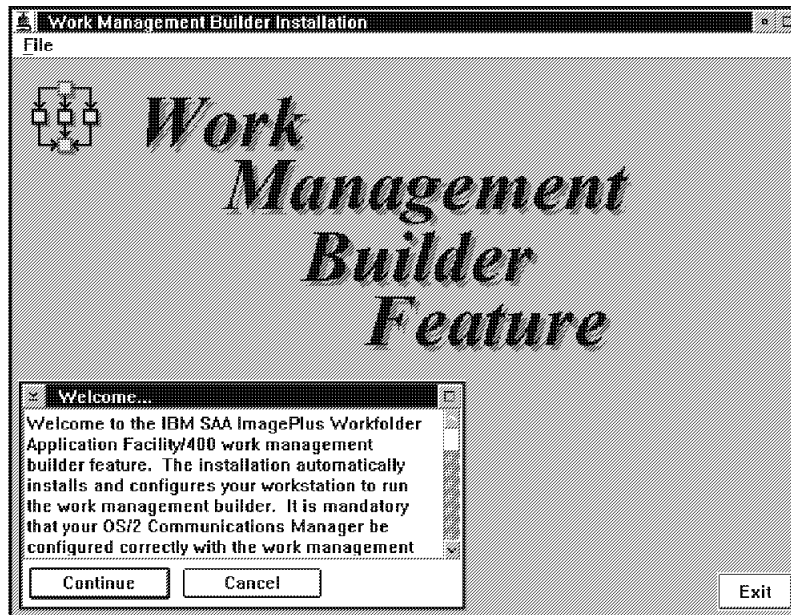


Figure 2. Work Management Builder Installation Window

6. Read the information in the window and then click on the **Continue** push button. You see the following messages: **Loading files** and **Querying product information**.

You see the Install window, which displays information about Work Management Builder.

7. Select one or both check boxes from the **Options** group. You can select the following:

Update CONFIG.SYS

To automatically update your CONFIG.SYS file. If you select **Update CONFIG.SYS**, the installation utility also creates a backup of your current CONFIG.SYS file in your file directory and names it CONFIG.BAK. It is recommended that you select the **Update CONFIG.SYS** check box.

If you leave this check box blank and continue, the installation utility does not update your CONFIG.SYS file for you. Therefore, you must manually update your CONFIG.SYS file before you start Work Management Builder. See "Updating Your CONFIG.SYS File" on page 15 for the information you need to add to your CONFIG.SYS file.

If you leave this check box blank, you are prompted to confirm that you want to manually update your CONFIG.SYS file. Click on the **Yes** push button to continue with the installation and manually update your CONFIG.SYS file before you start Work Management Builder. Click on the **No** push button to return to the Install window, where you select the **Update CONFIG.SYS** check box and restart the installation.

Overwrite files

To overwrite any file that has the same name as a Work Management Builder file. If you select **Overwrite files**, any existing Work Management Builder files that are found are automatically overwritten. This is useful if you start installing Work Management Builder and stop before installation is completed. When you start the installation process again, any files that are already copied do not need to be recopied.

If you leave this check box blank, you are prompted to confirm each file before it is overwritten.

- Click on the **OK** push button to start the installation process. The **Querying product information** message is displayed. You see the Install - directories window shown in Figure 3.

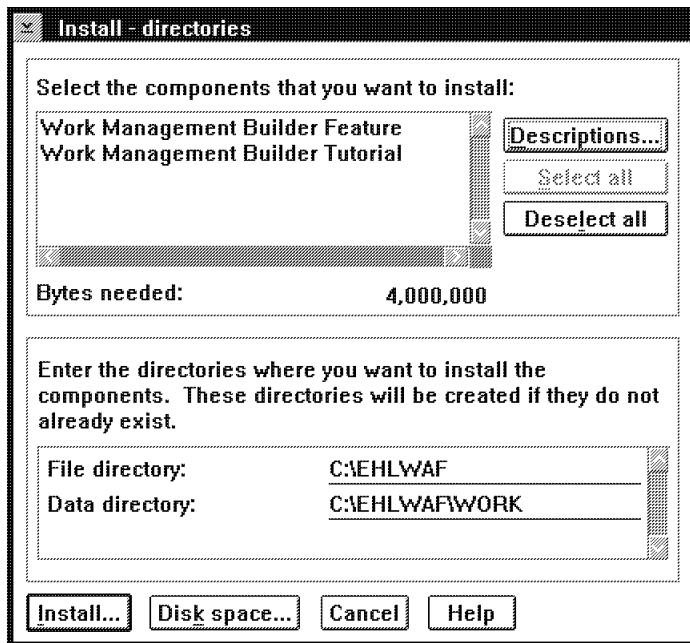


Figure 3. Install - Directories Window

Use this window to install Work Management Builder. You can use this window to check the available disk space for your workstation and to specify the directories where you want to install Work Management Builder components. You can also use this window to determine which drives have enough disk space to install the components you select.

- Select the name of the component that you want to install from the selection list. You can select one or both of the following:

Work Management Builder feature

To install only the basic Work Management Builder feature

Work Management Builder tutorial

To install the Work Management Builder tutorial. You must install Work Management Builder to install the Work Management Builder tutorial. If you select only the Work Management Builder tutorial, you are prompted to install Work Management Builder.

To select both components, click on the **Select all** push button.

To display a description of either component, select the component name, then click on the **Descriptions** push button.

To determine the number of bytes either component needs to be installed on your workstation, select the component. The bytes needed are displayed in the **Bytes needed** field.

To check the available disk space on your workstation and ensure that you have enough space to install Work Management Builder, select the component and then click on the **Disk space** push button. You see the Disk space window shown in Figure 4.

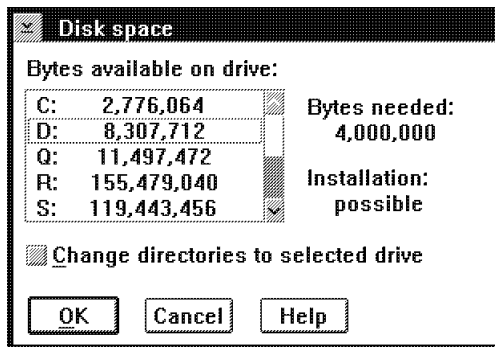


Figure 4. Disk Space Window

This window displays the number of bytes needed to install Work Management Builder, as well as the number of bytes available on each drive.

Select a drive from the **Bytes available on drive** list box. As you select a drive from the list, one of the following is displayed to the right of the list box:

Installation: possible

Indicates that the disk space available on the selected drive is adequate for installation

Installation: not possible

Indicates that the disk space available on the selected drive is not adequate for installation.

Click on the **Change directories to selected drive** check box to change the file and data directories on the Install - directories window to the selected drive.

10. In the **File directory** field, specify the drive, path, and directory where you want to install Work Management Builder files. The default is C:\EHLWAF. If you specify a

directory other than the default directory, you must specify a fully qualified path. The installation utility creates the directory if you specify a directory that does not already exist.

11. In the **Data directory** field, specify the drive, path, and directory where you want to store Work Management Builder data files. The default is C:\EHLWAF\WORK. If you specify a directory other than the default directory, you must specify a fully qualified path. The installation utility creates the directory if you specify a directory that does not exist.

You can specify a shared (LAN) drive location for Work Management Builder data files. However, you cannot subsequently run more than one Work Management Builder session at the same time using the shared data files.

12. Click on the **Install** push button to transfer the product files. You see the Install - progress window shown in Figure 5.

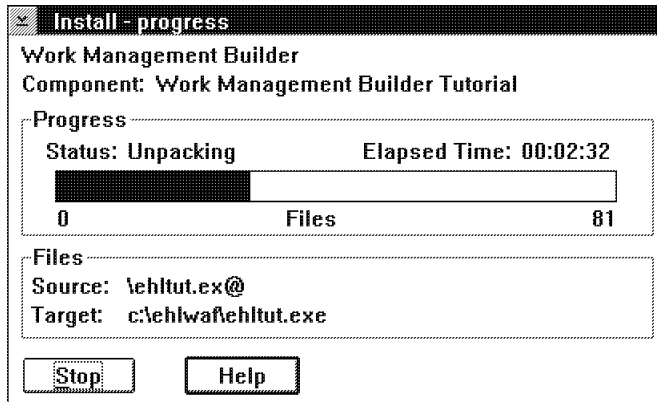


Figure 5. Install - Progress Window

You can use this window to check the progress of the installation. The **Progress** group displays the number of files to be transferred, the status of the installation, and the amount of time that has elapsed. The slider indicates how many of the files have been transferred. The **Source** and **Target** fields display the name of the file being transferred.

To stop the file transfer, click on the **Stop** push button. Note that if you click on the **Stop** push button, file transfer might not be complete and you cannot use the product.

During file transfer, you see the PCOMM settings window shown in Figure 6 on page 14.

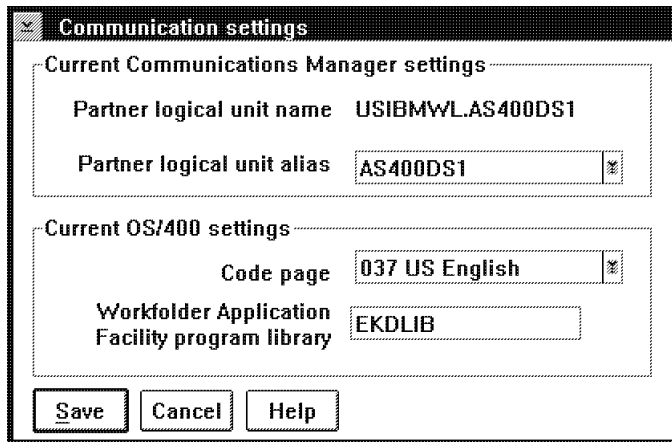


Figure 6. Communication Settings Window

13. In the **Partner logical unit alias** drop-down list, select the alias (nickname) that is assigned to your AS/400 system. Do not continue with the installation if you are uncertain about the information that is required in this field. All of the aliases that are defined for your workstation are displayed. If the alias for your AS/400 system is not displayed, do not continue with the installation. You must configure PCOMM for 5250 emulation before you can install Work Management Builder.

When you select an alias, the **Partner logical unit name** field changes automatically to reflect the associated AS/400 LAN name. In some cases, the alias and name might be the same.

14. In the **Code page** drop-down list, select the language-specific code page that is installed on your AS/400 system. Both the code page number and the language are listed. The default code page is 037 US English. Do not continue with the installation if you are unsure about the information required in this field. You might need to contact your AS/400 system administrator for the OS/400 information.
15. In the **Workfolder Application Facility program library** field, specify the name of the program library that was specified when Workfolder Application Facility was installed. The default name is EKDLIB. If the library name is different on the AS/400 system, replace the default name with your specific name. Do not continue with the installation if you are uncertain about the information that is required in this field. You might need to contact your AS/400 system administrator for OS/400 information.
16. Click on the **Save** push button. When the files on diskette 1 have been transferred, you are prompted to insert Work Management Builder Installation Diskette 2.
17. Insert diskette 2.
18. Click on the **Continue** push button to continue the installation. A message box is displayed confirming that the installation is complete.
19. Select **Exit** from the **File** pull-down or click on the **Exit** push button to exit the installation utility. If you chose to make the changes to your CONFIG.SYS file, you

must make those changes before continuing to the next step. See "Updating Your CONFIG.SYS File" on page 15 for the information you need to add to your CONFIG.SYS file.

20. Shut down and restart your workstation for the changes to your CONFIG.SYS file to take effect.

After you restart the workstation, you can start Work Management Builder. The Work Management Builder Folder icon is displayed on the OS/2 desktop.

Updating Your CONFIG.SYS File

If you choose not to have the installation utility automatically update your CONFIG.SYS file, you must manually update your CONFIG.SYS file. This section provides the statements you need to add to your CONFIG.SYS file before you can use Work Management Builder.

When you make changes to the statements in your CONFIG.SYS file, you must make sure that there is a semicolon (;) at the end of each line that you change. Also, C:\EHLWAF is the default directory used during the installation. If you want to install Work Management Builder in a different directory or drive, use that directory instead of C:\EHLWAF.

To manually update the statements in your CONFIG.SYS file, follow these steps:

1. Type **COPY C:\CONFIG.SYS C:\CONFIG.BAK** at the OS/2 prompt to make a copy of your CONFIG.SYS file.
2. Use any text editor to edit your CONFIG.SYS file:
 - a. Add C:\EHLWAF; to the SET LIBPATH= statement.
 - b. Add C:\EHLWAF; to the SET PATH= statement.
 - c. Add C:\EHLWAF; to the SET HELP= statement.
3. Save and close the CONFIG.SYS file.
4. Shut down and restart your workstation for the changes to your CONFIG.SYS file to take effect.

After you restart the workstation, you can start Work Management Builder. The Work Management Builder Folder icon is displayed on the OS/2 desktop.

Selecting the Work Management Builder Folder

Double-click on the Work Management Builder folder icon on the OS/2 desktop to display the IBM Work Management window shown in Figure 7 on page 16.

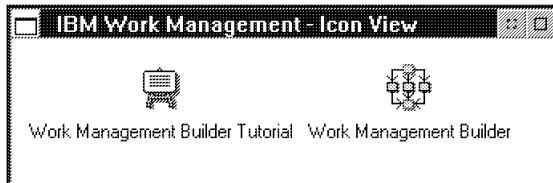


Figure 7. IBM Work Management Window

The IBM Work Management window contains the Work Management Builder icon and the Work Management Builder Tutorial icon, if it is installed.

To start Work Management Builder, double-click on the Work Management Builder icon in the Work Management Builder folder window. The Work Management Builder copyright window is displayed. You are now ready to use Work Management Builder. See Chapter 3, "Getting Started" on page 19, for more information on using Work Management Builder.

To start the tutorial, double-click on the Work Management Builder Tutorial icon in the Work Management Builder Folder window. You are now ready to use the tutorial. See Appendix A, "Using the Work Management Builder Tutorial" on page 89 for a description of tutorial features.

Deleting Work Management Builder

You can delete Work Management Builder from your workstation. Before you delete the files, make sure that Work Management Builder is not already running on your workstation.

When you delete Work Management Builder from your workstation, you delete only the files that were transferred during installation. The data files that you create when you use Work Management Builder are not deleted.

Follow these steps to delete Work Management Builder.

1. From the OS/2 desktop, switch to or start an OS/2 window or OS/2 full-screen session.
2. Insert Work Management Builder Installation Diskette 1 in your workstation diskette drive.
3. At the OS/2 prompt, type **A:\INSTALL** and press Enter. You see the Work Management Builder Installation window shown in Figure 2 on page 10.
4. Read the information in the window, and then click on the **Continue** push button. You see the Installation options window shown in Figure 8 on page 17.

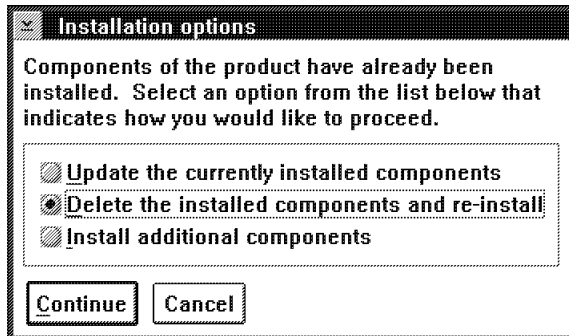


Figure 8. Installation Options Window

5. Select the **Delete the installed components and re-install** radio button to delete Work Management Builder from your workstation. You can then reinstall Work Management Builder.

The following radio buttons are also displayed:

Update the currently installed components

To update Work Management Builder as modifications or new releases become available.

Install additional components

To install the Work Management Builder tutorial if you installed only Work Management Builder. This selection is not displayed if both the basic Work Management Builder product and the tutorial are installed on your workstation.

You see the following messages: Loading files and Querying product information and then you see the Delete window, which information about Work Management Builder.

6. Select the name of the component that you want to delete from the selection list. You can select one or both of the following:

Work Management Builder feature

To delete Work Management Builder. You must delete the tutorial if you delete the basic feature.

Work Management Builder tutorial

To delete the Work Management Builder tutorial.

To select both components, click on the **Select all** push button.

7. Click on the **Delete** push button to delete the selected component, or click on the **Cancel** push button to cancel the deletion.

After you click on the **Delete** push button, you see the Delete - progress window shown in Figure 9 on page 18.

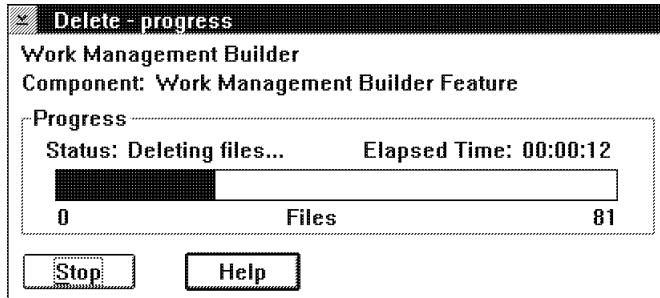


Figure 9. Delete - Progress Window

The status in the **Progress** group changes to **Deleting files**, indicating that Work Management Builder is being deleted. The Work Management Builder package file is processed, and all its files are deleted.

To stop the file deletion, click on the **Stop** push button. You are prompted to confirm that you want to stop the process. Click on the **Yes** push button to stop the delete process. Note that, if you click on the **Yes** push button, file deletion is not complete and you cannot use the product. Click on the **No** push button to continue the delete process.

When you have finished deleting the files, a message is displayed confirming that the deletion was successful.

8. Click on the **OK** push button. You see the Install window, which provides information about Work Management Builder.

You can reinstall Work Management Builder or you can exit the installation utility.

To exit the installation utility without reinstalling Work Management Builder, select **Exit** from the **File** pull-down or click on the **Exit** push button.

Chapter 3. Getting Started

If you have not installed Work Management Builder, refer to Chapter 2, "Installing Work Management Builder" on page 7, for complete installation instructions.

Working with Work Management Builder Windows

You can use Work Management Builder windows to work with workbaskets, action lists, and work processes. The primary window is the Work Management Builder window, which contains objects (icons) that represent groups of action lists, workbaskets, and work processes. See Figure 10.

You can use the Work Management Builder window to display the windows associated with these objects. These windows are called *object container* windows because they contain the action list, the workbasket, and the work process objects.

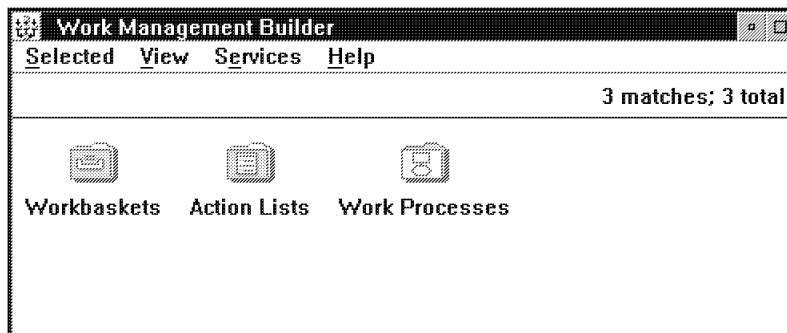


Figure 10. Work Management Builder Window

The *title bar* of the window displays the window name. The *menu bar*, which is located below the title bar, contains keywords that let you work with the objects in the window. When you select a keyword, a *pull-down menu* is displayed. Many of the pull-down actions work on one or more selected objects.

You can use the pull-down selections to open an object container window, change the display of the Work Management Builder window, log on and off Workfolder Application Facility, and get online help. For a detailed explanation of each pull-down choice, select the choice and press F1.

The *status area* is located below the menu bar. The status area shows the number of objects currently contained in the window and the total number of objects available. To remove the status area, select **Status area** from the **View** pull-down. To display the status area, select **Status area** again. For more information on filtering the list of objects to include only certain objects, see "Filtering the View" on page 33.

Work Management Builder provides visual cues when an object is new, in use, or checked out.



When an object is new, its icon contains a diamond in its lower right corner to indicate its status.



When a window for an object is open (that object is in use), its icon contains a cross-hatched pattern.



When an object is checked out, its icon contains a check mark in its lower right corner.

Using Object Container Windows

From the Work Management Builder window, you can choose to work with action lists, workbaskets, or work processes in an object container window. An object container window contains object icons that represent action lists, workbaskets, or work processes. These icons are sorted alphabetically from left to right, top to bottom.

To open one of these object container windows, double-click on the icon associated with the object you want to work with. You can also select the icon and then select **Open** from the **Selected** pull-down. Figure 11 is an example of a Workbaskets container window.

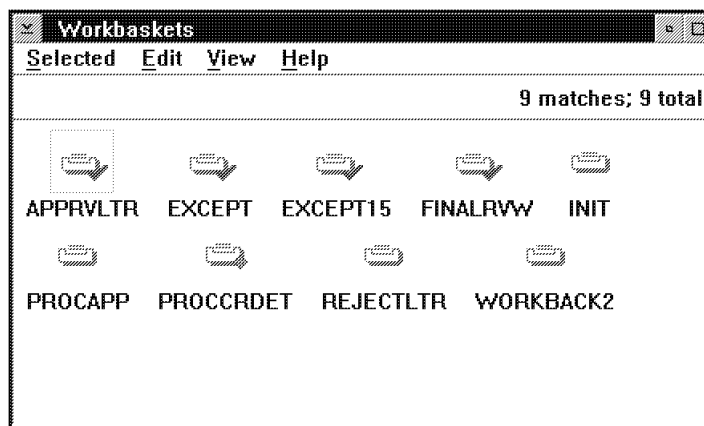


Figure 11. Workbaskets Container Window

You can use the pull-down selections to open an object window, work with existing objects, change the objects that are displayed in the object container window and how the window is displayed, and get online help. For a detailed explanation of each pull-down choice, select the choice and press F1.

All actions available from an object container window menu bar are discussed in detail in Chapter 4, "Using Work Management Builder Objects" on page 26.

Using Object Windows

When you double-click on an icon in an object container window, the object window associated with the icon is displayed.

- Double-click on an icon in the Action Lists container window to display the Action List window, where you can define or update an action list. For more information on working with the Action List window, see Chapter 5, “Working with Action Lists” on page 36.
- Double-click on an icon in the Workbaskets container window to display the Workbasket window, where you can define or update a workbasket. For more information on working with the Workbasket window, see Chapter 6, “Working with Workbaskets” on page 42.
- Double-click on an icon in the Work Processes container window to display the Work Process window, where you can use the work process editor to define or update a work process. For more information on working with the Work Process window, see Chapter 8, “Using the Work Process Window” on page 56.

You can also select the icon and then select **Open** from the **Selected** pull-down.

Opening Work Management Builder

Follow these steps to open Work Management Builder:

1. Double-click on the Work Management Builder Folder icon on the OS/2 desktop. You see the IBM Work Management window shown in Figure 12.

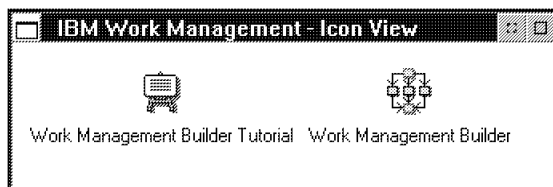


Figure 12. IBM Work Management Window

The IBM Work Management window contains the Work Management Builder icon and the Work Management Builder Tutorial icon, if it is installed.

2. Double-click on the Work Management Builder icon. You see the About window, which provides information about Work Management Builder. To continue with Work Management Builder, click on the **OK** push button or press Enter. The About window closes. If you have not logged on to Workfolder Application Facility, a message reminds you that you must log on at least once. Click on the **OK** push button or press Enter. You see the Work Management Builder Logon window shown in Figure 13 on page 23.

Logging On to Workfolder Application Facility

You can use Work Management Builder with a connection to Workfolder Application Facility or locally without a connection. When you use Work Management Builder without a host connection, you are in *local mode*.

You must log on to Workfolder Application Facility at least once before you work in local mode. In addition, Work Management Builder uses Workfolder Application Facility as its main database, so a connection to Workfolder Application Facility is necessary to be sure that you are working with data that is current as of the time you log on.

Work Management Builder uses commitment control when checking objects in and out of Workfolder Application Facility. The first time a user logs onto Workfolder Application Facility, journaling is activated through Work Management Builder. Successful logon is achieved when a user is able to begin journaling for the work management objects or journaling was previously started.

You can use one of the following ways to ensure successful logon to the host from Work Management Builder.

1. When Workfolder Application Facility files are journaled as part of the application's disaster recovery plan, it is not necessary to start journaling when logging onto the host through Work Management Builder.
2. Work Management Builder starts journaling during a logon process if journaling has not previously started. When users are logged onto Workfolder Application Facility and have any necessary work management files opened, a logon is unsuccessful.
3. You can issue the following command to start journaling Work Management Builder files. Before doing so, however, be sure no users are logged on to the system or working on any work management functions.
 - From an AS/400 command line type `EKDJRNSTRB ASP(01) ASP=`. Enter the auxiliary storage pool where journaling executes. The default ASP is the system ASP(01).

If the command fails, an error is written to the EKD0080 error file. Check this file to be sure there are no error messages for this command before attempting your first logon to Work Management Builder.

Once all objects are checked in and the user has confirmed that it is not necessary to logon to Work Management Builder, you can stop journaling by entering `EKDJRNSTPB` at an AS/400 command line.

Logging off Work Management Builder does *not* stop journaling of work management files.

Using Work Management Builder with a Host System Connection

You must be connected to Workfolder Application Facility to check out objects you want to update and to check in objects you created or updated.

When you check out an object, Work Management Builder queries Workfolder Application Facility for the object you want to update and stores a copy of the data on your workstation. When you check in an object, you permanently store the new or updated data associated with the action list, workbasket, or work process on Workfolder Application Facility.

For more information on checking objects in and out of Workfolder Application Facility, see “Checking Out Objects” on page 28 and “Checking In Objects” on page 28.

Before you establish a connection to Workfolder Application Facility, make sure that IBM Personal Communications (PCOMM) is configured and running on your workstation. Follow these steps to log on to Workfolder Application Facility.

1. Type your Workfolder Application Facility user ID in the **User ID** entry field in the Work Management Builder Logon window, shown in Figure 13.

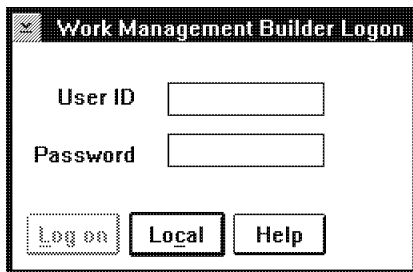


Figure 13. Work Management Builder Logon Window

2. Type your Workfolder Application Facility password in the **Password** entry field. Your password displays as asterisks (*) for security reasons.
3. Click on the **Log on** push button to log on to Workfolder Application Facility. Note that the **Log on** push button is not available until you type your user ID or password.

To cancel the logon and work in local mode, click on the **Local** push button. To cancel the logon and close Work Management Builder at program startup, select **Close** from the title bar menu. The title bar icon is located in the upper left corner of the Work Management Builder Logon window.

Context-sensitive help is always available. Press F1 or click on the **Help** push button to display online help.

If you are in local mode, you can establish a connection to Workfolder Application Facility from the Work Management Builder window by selecting **Log on** from the **Services** pull-down. You see the Work Management Builder Logon window shown in Figure 13.

After you have logged on to Workfolder Application Facility, you see the Loading Data window shown in Figure 14 on page 24.

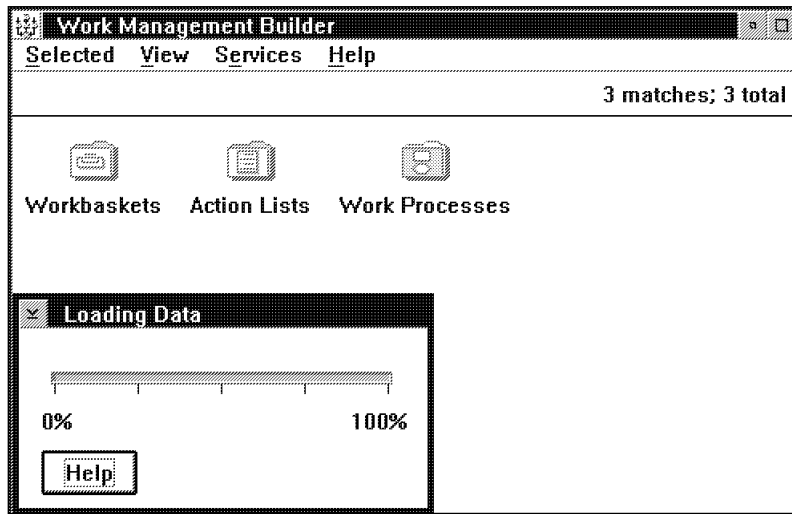


Figure 14. Loading Data Window

The progress indicator shows the percentage of the host system data that has been loaded. Click on the **Help** push button to display context-sensitive help.

Using Work Management Builder without a Host System Connection

You can use Work Management Builder in local mode—without a host connection—to perform the following tasks:

- Create and update objects. Work Management Builder saves the objects locally.
- Browse Work Management Builder objects that you saved locally or checked out during a previous session.
- Print information associated with an object.
- Copy information associated with an object.

However, it is recommended that you use Work Management Builder with a connection to Workfolder Application Facility. This ensures that your data is current as of the time you log on. In addition, if a number of users are involved in defining a work process, they can share and view common workbaskets, action lists, and work processes on Workfolder Application Facility.

To use Work Management Builder in local mode, click on the **Local** push button in the Work Management Builder Logon window shown in Figure 13 on page 23. You do not need to type a user ID or password. If you click on the **Local** push button, Work Management Builder retrieves data locally. You must log on to Workfolder Application Facility at least once before you work in local mode.

After you click on the **Local** push button, you see the Loading Data window shown in Figure 14. The progress indicator shows the percentage of the data that has been loaded. Click on the **Help** push button to display context-sensitive help.

Working in Different Edit Modes

Work Management Builder edit modes lets you create and update new objects, update existing objects if they are checked out, and browse existing objects (including those that are checked out by another user) without checking them out. You can use the following edit modes:

Create mode

To create and define new objects. Create mode is always active when an object is new. An object is considered new before it is checked in for the first time.

Update mode

To update the contents of workbaskets, action lists, and work processes if they already exist and are checked out.

Browse mode

To view existing objects without checking them out. You cannot update the contents of objects while in browse mode.

Logging Off Workfolder Application Facility

To log off Workfolder Application Facility and work in local mode:

1. Select **Log off** from the **Services** pull-down. A confirmation window is displayed.
2. Click on the **Yes** push button to log off Workfolder Application Facility, or click on the **No** push button to keep your connection to Workfolder Application Facility.

If you click on the **Yes** push button, Work Management Builder operates in local mode. It also operates in local mode whenever you cannot log on to Workfolder Application Facility because the connection is temporarily unavailable.

In addition, Work Management Builder protects your data by operating in local mode if the connection between your workstation and Workfolder Application Facility is broken during a session.

Closing Work Management Builder

To close Work Management Builder, select **Close** from the title bar pull-down in the Work Management Builder window. The title bar icon is located in the upper left corner of the Work Management Builder window. All open Work Management Builder windows are closed, and you are logged off Workfolder Application Facility (if you are logged on). You are prompted to save any data that you have not yet saved.

Chapter 4. Using Work Management Builder Objects

From the Work Management Builder window shown in Figure 15, you can choose to work with groups of workbasket, action list, or work process objects by opening one or more object container windows associated with these object types.

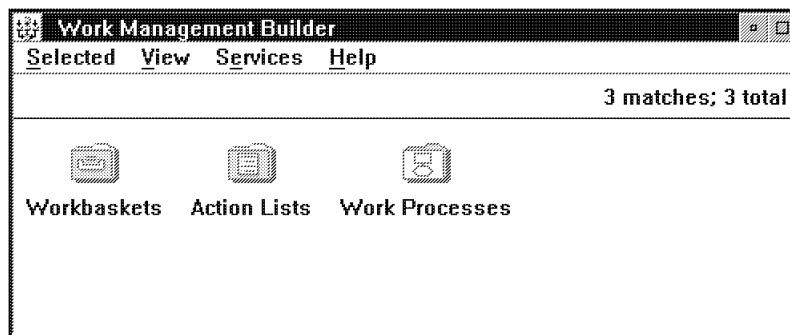


Figure 15. Work Management Builder Window

The Work Management Builder window is displayed after you log on to Workfolder Application Facility or click on the **Local** push button in the Logon window. For more information on logging on to Workfolder Application Facility or working in local mode, see "Logging On to Workfolder Application Facility" on page 22.

Opening an Object Container Window

From an object container window, you can open, check out, update, and check in existing objects, and you can create new objects.

To open an object container window, double-click on the icon in the Work Management Builder window associated with the object you want to work with. You can also select one or more icons and then select **Open** from the **Selected** pull-down.

For example, to open the Workbaskets container window shown in Figure 16 on page 27, double-click on the Workbaskets icon in the Work Management Builder window.

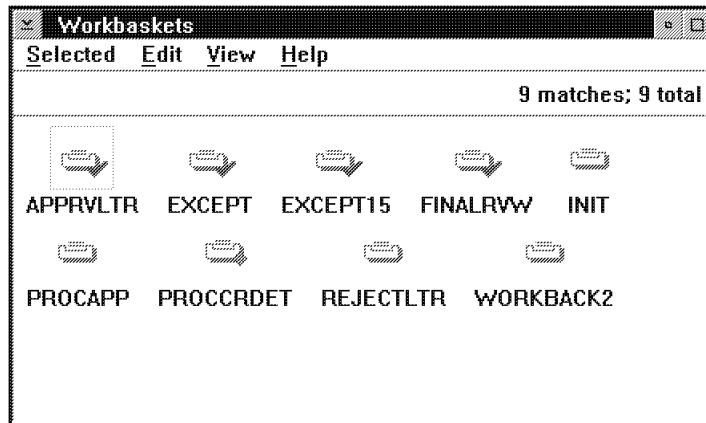


Figure 16. Workbaskets Container Window

Closing an Object Container Window

To close an object container window, select **Close** from the title bar pull-down in the object container window. The title bar icon is located in the upper left corner of the object container window.

You are prompted to save any data that you have not yet saved. All open object windows are closed as well as the object container window.

Creating an Object

To create a new object, select **Create another** from the **Edit** pull-down. The window that is displayed lets you define that object.

For more information on creating an action list, workbasket, and work process, see “Creating an Action List” on page 37, “Creating a Workbasket” on page 42, and “Creating a Work Process” on page 52, respectively.

Opening an Object

You can open one or more objects at a time. If you have checked out the object you open, it is displayed in update mode. If you have not checked out the object, it is displayed in browse mode. If you open a new object, it is displayed in create mode. For more information on Work Management Builder edit modes, see “Working in Different Edit Modes” on page 25.

Opening One Object

To open a single object from an object container window, double-click on the object icon. You can also:

1. Select the icon representing the object you want to open.

2. Select **Open** from the **Selected** pull-down.

The object is opened and the window for the opened object is displayed.

Opening More than One Object

To open more than one object at a time:

1. Select the icons or text representing the objects you want to open.
2. Select **Open** from the **Selected** pull-down. All selected objects are opened and the windows for the selected objects are displayed.

Checking Out Objects

Before you can update an object, you have to check it out so that other users cannot make changes to it at the same time. When you check out an object, Work Management Builder gets the most current copy of the data about the object from Workfolder Application Facility, which puts a *lock* on the data so that other users cannot change it.

You can check out an opened object from an object window or an unopened object from an object container window. When you check out an object, a check mark is displayed below its icon.

Note that you must be logged on to Workfolder Application Facility before you can check out an object. For more information on logging on, see “Logging On to Workfolder Application Facility” on page 22.

Checking Out an Object from a Container Window

Follow these steps, to check out one or more objects from the Workbaskets, the Action Lists, or the Work Processes container window.

1. Select the icon representing the object you want to check out.
2. Select **Check out** from the **Selected** pull-down. A check mark is placed below the icon to indicate that you checked out the object.

Checking Out an Object from an Object Window

If you decide to update an object that you opened in browse mode, you can check it out if you are logged on to Workfolder Application Facility.

To check out an object from the Action List or the Workbasket window, click on the **Check out** push button. To check out an object from the Work Process window, select **Check out** from the **Work process** pull-down.

Checking In Objects

Objects that you create are not part of the Workfolder Application Facility database until they are checked in. Also, any changes that you make to existing objects are not

reflected in the Workfolder Application Facility database until you check the updated objects in.

You must verify a new or updated work process before you check it in. For more information on verifying a work process diagram, see “Verifying a Work Process” on page 77.

Note that you must be logged on to Workfolder Application Facility before you can check in an object. For more information on logging on, see “Logging On to Workfolder Application Facility” on page 22.

Checking In an Object from a Container Window

To check in one or more objects from the Workbaskets, the Action Lists, or the Work Processes container window:

1. Select the icon representing the object you want to check in.
2. Select **Check in** from the **Selected** pull-down. The diamond or check mark is removed from the icon to indicate that you checked in the object. Work Management Builder also stores a copy of the object locally so that you can browse it. For more information on Work Management Builder editing modes, see “Working in Different Edit Modes” on page 25.

Checking In an Object from an Object Window

To check in an object from the Action List or the Workbasket object window, click on the **Check in** push button. To check in an object from the Work Process window, select **Check in** from the **Work process** pull-down.

Resolving Name Conflicts

If you try to check in a new object with a name that currently exists on Workfolder Application Facility, a message box is displayed prompting you to rename the new object. When a conflict occurs, you must rename the new object before you check it in. Click on the **OK** push button. You see the Rename window shown in Figure 17.

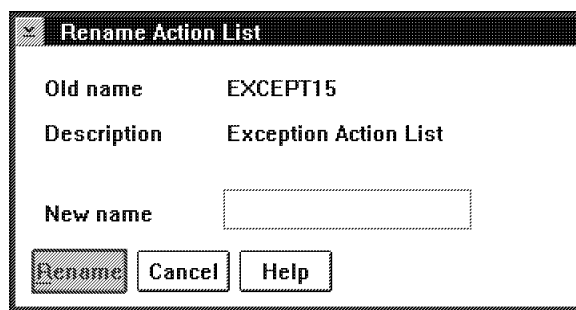


Figure 17. Rename Window

The name and description of the existing object are displayed in the **Old name** and **Description** display fields, respectively.

To rename an object:

1. Type the new name for the object in the **New name** entry field. You can type up to 10 characters, including digits and special symbols.
2. Click on one of the following push buttons:

Rename To rename the object, close the Rename window, and continue the check-in process.

Cancel To close the Rename window and cancel the check-in process.

Context-sensitive help is always available. Press F1 or click on the **Help** push button to display online help.

Copying an Object

You can create a copy of a selected object. The copy contains the same data as the selected object, but with a unique name generated by Work Management Builder. To make a copy of an existing object:

1. Select the icon representing one or more objects that you want to copy.
2. Select **Copy** from the **Edit** pull-down.

The new object is displayed in the object container window near the original object. Before you work with the new object, you might want to change its name to something more meaningful than the name generated by Work Management Builder. You cannot change an object name after you check it in to Workfolder Application Facility.

To rename a new action list or workbasket object:

1. Select the icon representing the object you want to rename.
2. Select **Open** from the **Selected** pull-down. The object window is displayed.
3. Type over the name in the **Name** entry field in the object window.
4. Click on the **Save** push button.

To rename a new work process object:

1. Select the icon representing the object you want to rename.
2. Select **Open** from the **Selected** pull-down. The object window is displayed.
3. Select **Work process details** from the **Work process** pull-down. The Work Process Details window is displayed.
4. Type the new name in the **Name** entry field and the new description in the **Description** entry field.
5. Click on the **OK** push button.
6. Select **Save work process** from the **Work process** pull-down.

More information on using the Work Process Details window can be found on page "Naming a Work Process" on page 76.

Deleting an Object

You can delete one or more objects that are new or that you checked out. You must be logged on to Workfolder Application Facility to delete an object that is checked out. To delete one or more objects:

1. Select the icons representing the objects you want to delete.
2. Select **Delete** from the **Edit** pull-down. A confirmation message is displayed for each object.
3. Click on **OK** to confirm each deletion.

Any object that you delete from Work Management Builder is not deleted from Workfolder Application Facility until the Delete profiles function has been run. This Workfolder Application Facility function deletes only those objects that are eligible for deletion. For example, an action list is not eligible for deletion if it is associated with any workbasket in the system.

If you reuse the name of a deleted object, you cannot check the new object in until the deleted object has been successfully deleted from Workfolder Application Facility.

Printing the Contents of an Object

You can print the information associated with one or more selected objects to the OS/2 default printer. The information that is printed includes the name and the description of the object, the date and time of creation and the last update, whether the object is checked out, and the user ID of the person who checked the object out.

If you print a work process that has been verified, Work Management Builder also prints the text translation of certain nodes and connectors. You can also print a work process diagram. For information on printing the graphical representation of the diagram itself, see "Printing a Work Process Diagram" on page 80.

For information on changing the default printer, see your OS/2 documentation.

To print the information associated with a workbasket, action list, or work process:

1. Select the icon representing the object you want to print.
2. Select **Print** from the **Selected** pull-down in the object container window. You see the Print window shown in Figure 18 on page 32.

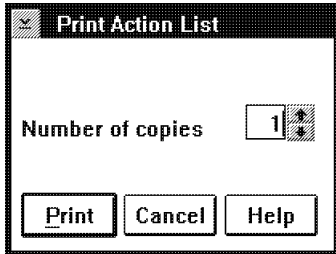


Figure 18. Print Window

3. Select the number of copies you want to print by using the **Number of copies** spin button. You can print from 1 to 99 copies.
4. Click on one of the following push buttons:
 - Print** To print the specified number of copies of the selected object on the default printer.
 - Cancel** To close the Print window without printing the selected object.

Context-sensitive help is always available. Press F1 or click on the **Help** push button to display online help.

Releasing an Object

When you check out an object, Work Management Builder queries Workfolder Application Facility for the data you want to update, stores a copy of the data on your workstation, and locks the object so that other users cannot change it.

When you release an object, you remove the lock on the object. You might want to release an object if you decide not to update an object that you checked out. After release, the object is restored to the way it was before you checked it out, even if you changed it.

An object that can be released has a check mark in the lower right corner of the icon, indicating that it is checked out.

To release the lock on one or more objects:

1. Select the icon representing the object you want to release.
2. Select **Release** from the **Selected** pull-down. A confirmation message is displayed for each object that you updated.
3. Click on **OK** to confirm each release.

Note that you must be logged on to Workfolder Application Facility before you can release an object. For more information on logging on, see “Logging On to Workfolder Application Facility” on page 22.

Filtering the View

You can specify which group of objects to include in the object container window by associating the object name with the object status criteria. Work Management Builder then includes only those objects that meet the criteria in the current display. You can work with any object in the object container window, regardless of whether or not it is included in the current display.

Follow these steps to filter the display to include certain objects.

1. Select **Include** from the **View** pull-down. You see the Include window shown in Figure 19.

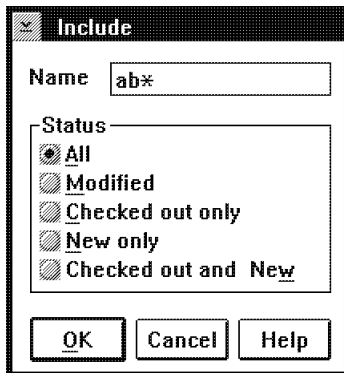


Figure 19. Include Window

2. Type a name in the **Name** entry field. You can use an asterisk as a wildcard by itself to represent all object names, or at the beginning or end of a name to represent one or more missing characters. For example, type **ab*** to indicate object names that begin with the characters *ab*.
3. Select one of the following from the **Status** group box:
 - All** To display a list of all objects with the name specified in the **Name** entry field.
 - Modified**
To display a list of all checked-out objects that were updated and that match the name specified in the **Name** entry field, and all new objects that match the name specified in the **Name** entry field.
 - Checked out only**
To display a list of all checked-out objects that match the name specified in the **Name** entry field.
 - New only**
To display a list of all new objects that match the name specified in the **Name** entry field.
 - Checked out and new**
To display a list of all checked-out objects and new objects that match the name specified in the **Name** entry field.

4. Click on the **OK** push button to refresh the object container window to display objects that match the include criteria.

Context-sensitive help is always available. Press F1 or click on the **Help** push button to display online help.

You can change the criteria in the Include window to redisplay hidden objects. To display all of the object names in the object container window, type an asterisk (*) in the **Name** entry field, select **All** from the **Status** group box, and click on the **OK** push button.

Displaying a List of Checked-Out Objects

You can determine which objects are checked out by filtering the list of objects to include only those that you checked out. To display a list of checked-out objects in the Workbaskets, the Action Lists, or the Work Processes container window:

1. Select **Include** from the **View** pull-down. You see the Include window shown in Figure 19 on page 33.
2. Type an asterisk (*) in the **Name** entry field.
3. Select **Checked out only** from the **Status** group box.
4. Click on the **OK** push button. The object list is refreshed to include only those objects that you checked out.

Figure 20 shows a window view that is changed based on the include criteria.

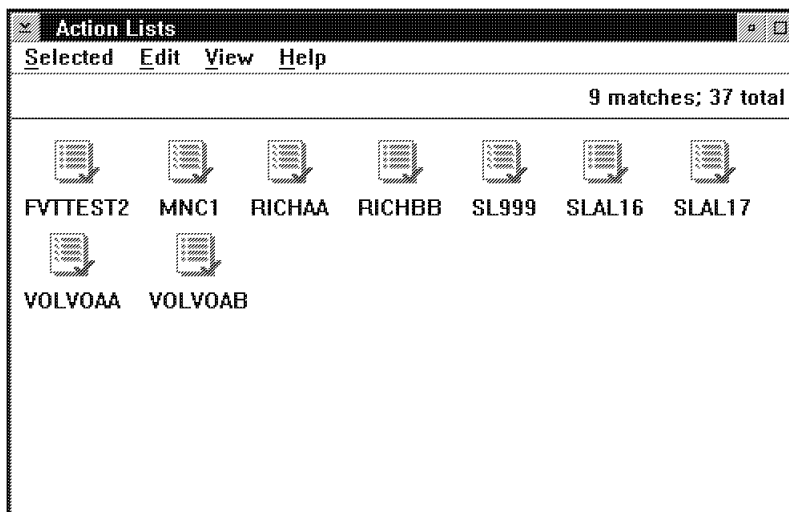


Figure 20. Action Lists Window Displaying Only Checked-Out Action Lists

This Action Lists window displays only action lists that you have checked out. Note that the status area is changed to reflect the number of action lists that match the include criteria out of the total number of action lists.

Displaying a List of Updated Objects

You can check in all of the objects you updated by filtering the list of objects to include only those that you updated, and then checking in those objects.

To display a list of updated objects in the Workbaskets, the Action Lists, or the Work Processes container window:

1. Select **Include** from the **View** pull-down. You see the Include window shown in Figure 19 on page 33.
2. Type an asterisk (*) in the **Name** entry field.
3. Select **Modified** from the **Status** group box.
4. Click on the **OK** push button. The object list is refreshed to include only those objects that you updated.

To check in the updated objects:

1. Select **Select all** from the **Edit** pull-down.
2. Select **Check in** from the **Selected** pull-down.

The updated objects are checked in to Workfolder Application Facility.

Chapter 5. Working with Action Lists

An action list, which is composed of functions and options, describes the actions that a user can perform on a work package. When you create an action list, you can define different actions that are performed on the entire work package (with *function keys*) or on individual documents in the work package (with *options*).

The *MANAGE action list is shipped with the product. You can change but not delete it, and you can associate it with any workbasket. It is always associated with the Search for Work Packages interface.

An action list includes only those functions and options that you want the user to be authorized to perform when the work process is run on Workfolder Application Facility. For example, you might define an action list with only view and print functions. You can then assign this action list to a workbasket at which a user only reviews work, but has no need to change the work.

For more information on the function keys and options available, see Appendix B, "Defining Function Keys and Options" on page 97.

An action list can describe:

- Function keys already defined on Workfolder Application Facility
- Function keys that you define in the Action List window
- Options that a user can select

In Work Management Builder, each action list is an object that is represented by an action list icon. These action list objects are defined and displayed in the Action Lists container window. A sample Action Lists container window is shown in Figure 21.

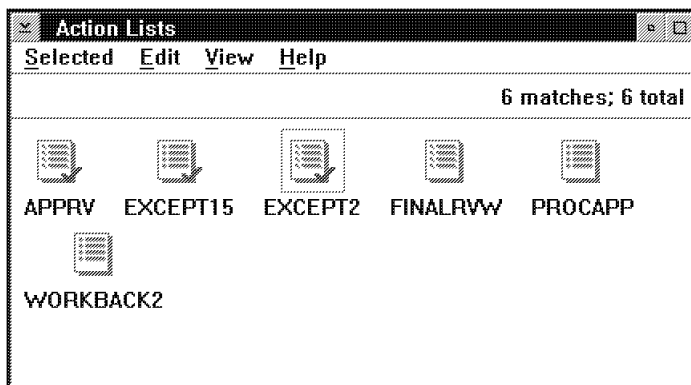


Figure 21. Action Lists Container Window

From the Action Lists container window, you can open, check out, release, and check in existing action lists, and create new action lists.

Creating an Action List

To create a new action list:

1. Double-click on the Action Lists icon in the Work Management Builder window. You can also select the Action Lists icon, then select **Open** from the **Selected** pull-down. You see the Action Lists container window shown in Figure 21 on page 36.
2. Select **Create another** from the **Edit** pull-down. You see the Action List window shown in Figure 22.

Function and option description	Number	Screen prompt
Move document	2	Move

Figure 22. Action List Window

You can use this window to build an action list by adding functions and options to, and deleting functions and options from, the function list below the **Add** and **Delete** push buttons.

3. Type the name for the new action list in the **Name** entry field. You can type up to 10 characters, including digits and special symbols. The name must be unique for an action list. The name is displayed in uppercase letters when you save the action list or check it in. This is a required field.
4. Type a description for the action list in the **Description** entry field. You can type up to 30 characters, including digits and special symbols. This is a required field.
5. Select an action list **Type**. You can select one of the following radio buttons:

Index To create an action list that defines only function keys. If you select the **Index** radio button, the group box below is labeled **Function list**, and the **Function description** drop-down list contains functions from Workfolder Application Facility. For more information on the function keys available for an index action list, see Table 3 on page 97.

Work To create an action list that defines both function keys and options. If you select the **Work** radio button, the group box below is labeled **Function and option list**, and the **Function and option description** drop-down list contains functions and options.

For more information on the function keys and options available for a work action list, see Table 4 on page 98.

The default value for new action lists is **Work**.

Any function list that is already defined is deleted if you change the type. A warning message is displayed if you select a different action list type.

This choice is not available when you open an action list in update mode. For more information on Work Management Builder editing modes, see “Working in Different Edit Modes” on page 25. If you want to change the action list type, you can copy the action list, then change the type of the new action list. For more information on copying an action list, see “Copying an Object” on page 30.

6. Select the description of the function or option that you want to include in the function list from the **Function description** or **Function and option description** drop-down list (for example, **Add form to folder** from the **Function description** drop-down list).

This drop-down list contains a description of all possible functions and options, regardless of what is currently in the function list. The functions (or options) that are listed depend on whether you select **Index** or **Work** as the action list type.

The **Number** and **Screen prompt** fields are updated to display the default values for the selected function or option.

The default function for a new action list is the first function or option in the drop-down list. Any index action list that you define must contain an exit or a cancel function. Any work action list that you define must contain an exit, a cancel, a continue, or a force continue function.

7. Use the **Number** spin button if you want to change the function number or the option (for example, **F18** to replace **F17**). This drop-down list contains all possible functions (and options), regardless of what is currently in the function list. The choices available with this spin button depend on what you have selected from the **Function and option description** drop-down list.
8. Type a short description of the function or option in the **Screen prompt** entry field if you want to change the screen prompt (for example, **Add credit report**). This description is displayed on the Workfolder Application Facility host system screen. You can type up to 20 characters, including digits and special symbols. This is a required field.
9. Click on the **Add** push button to add the function or the option to the function list. If you try to add a function or an option with a number that is already defined, you are prompted to confirm that you want to replace the existing function or option. You use the **Add** push button to build your action list by adding functions and options.

10. Click on the **Delete** push button to delete the selected function or option from the function list. When you select a function or an option, its description, number, and screen prompt are displayed in the corresponding fields. You use the **Delete** push button to change your action list by deleting functions and options.
11. Click on one of the following push buttons:
 - Save** To save the information for this action list and close the window without checking in the action list. The information is saved locally on your workstation. Work Management Builder verifies the information in the window for valid values before saving the action list.
 - Check in** To save the information for this action list, check in the action list, and close the window. Work Management Builder verifies the information in the window for valid values before checking in the action list. This push button is available only if you are logged on to Workfolder Application Facility.
 - Check out** To check out the action list if you are working in browse mode without closing the window. The data is refreshed with the most recent data from Workfolder Application Facility. The Action List window switches from browse mode to update mode, and you can make changes to the action list. This push button is available only if you are logged on to Workfolder Application Facility.
 - Cancel** To cancel the Action List window without saving changes to the action list. An unnamed icon is displayed in the Action Lists window. This icon represents the action list that you cancelled. When you close the Action Lists container window, the icon is removed.

Context-sensitive help is always available. Press F1 or click on the **Help** push button to display online help.

Renaming an Action List

When you create a new action list, you must give it a unique name. If an action list with the same name already exists on your workstation, you are prompted to change the name of the new action list when you click on the **Save** or the **Check in** push button in the Action List window.

If an action list with the same name already exists on Workfolder Application Facility, you are prompted to change the name of the new action list when you click on the **Check in** push button in the Action List window, or select **Check in** from the **Selected** pull-down in the Action Lists container window. For more information on changing the name of an action list, see “Resolving Name Conflicts” on page 29.

Updating an Action List

Follow these steps to update an action list that exists on Workfolder Application Facility.

1. Make sure that you have checked out the action list. If not, select the icon representing the action list you want to change and select **Check out** from the

Selected pull-down in the Action Lists container window. The icon contains a check mark to indicate that the action list is checked out.

2. Double-click on the icon. You can also select the action list icon and then select **Open** from the **Selected** pull-down. You see the Action List window shown in Figure 22 on page 37.

The window displays the information that was saved the last time the action list was saved locally or checked in to Workfolder Application Facility.

3. Update the fields as described in “Creating an Action List” on page 37. You can change all of the fields except the **Name** entry field and the **Type** radio buttons.
4. After you make all of your changes, click on one of the following push buttons:

Save To save the information for this action list and close the window without checking in the action list. The information is saved locally on your workstation. Work Management Builder verifies the information in the window for valid values before saving the action list.

Check in To save the information for this action list, check in the action list, and close the window. Work Management Builder verifies the information in the window for valid values before checking in the action list. This push button is available only if you are logged on to Workfolder Application Facility.

Cancel To cancel the Action List window without saving changes to the action list.

Context-sensitive help is always available. Press F1 or click on the **Help** push button to display online help.

Browsing an Action List

You can open an action list in browse mode that you have not checked out. However, you cannot change any of the fields. See “Working in Different Edit Modes” on page 25 for a description of Work Management Builder editing modes.

To browse an action list:

1. Double-click on the icon representing the action list you want to browse in the Action Lists container window. You can also select the action list icon and then select **Open** from the **Selected** pull-down. You see the Action List window shown in Figure 22 on page 37.

2. When you have finished viewing the action list, click on one of the following push buttons:

Check out To check out the action list if you are working in browse mode without closing the window. The data is refreshed with the most recent data from Workfolder Application Facility. The Action List window switches from browse mode to update mode, and you can make changes to the action list. This push button is available only if you are logged on to Workfolder Application Facility.

Cancel To cancel the Action List window.

Context-sensitive help is always available. Press F1 or click on the **Help** push button to display online help.

Closing an Action List

To close an action list, select **Close** from the title bar pull-down in the Action List window. You are prompted to save any data that has not been saved.

- Click on the **Yes** push button to save the information for the action list and close the window. Work Management Builder verifies the information in the window for valid values before saving the action list.
- Click on the **No** push button to close the Action List window without saving the changes. If the action list has never been saved, an unnamed icon is displayed in the Action Lists window. This icon represents the action list that you did not save. When you close the Action Lists container window, the icon is removed.

Chapter 6. Working with Workbaskets

A workbasket is a point in a work process where work packages are handled. A workbasket contains work packages to be worked on by a user. When documents are in a workbasket, they are available for a user to work on them.

The rules for work and the method of work selection are part of the workbasket definition. For example, a workbasket can represent the in-basket of an individual user, a shared stack of sorted reports, or a table of correspondence.

In Work Management Builder, each workbasket is an object that is represented by a workbasket icon. These workbasket objects are defined and displayed in the Workbaskets container window. See Figure 23 for a sample Workbaskets container window.

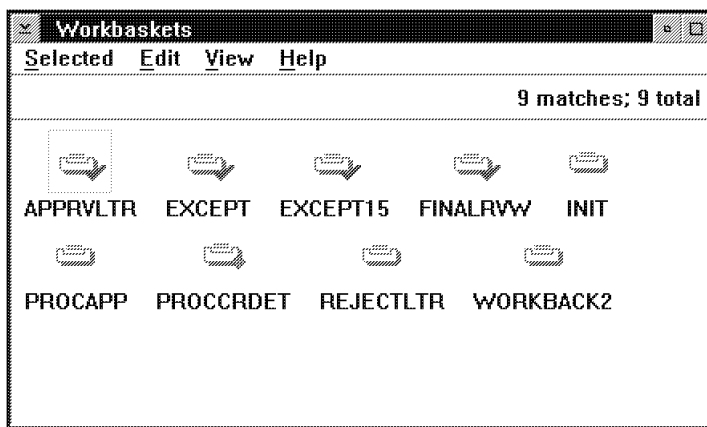


Figure 23. Workbaskets Container Window

From the Workbaskets container window, you can open, check out, release, and check in existing workbaskets and create new workbaskets.

Creating a Workbasket

To create a new workbasket:

1. Double-click on the Workbaskets icon in the Work Management Builder window. You can also select the Workbaskets icon, then select **Open** from the **Selected** pull-down. You see the Workbaskets container window shown in Figure 23.
2. Select **Create another** from the **Edit** pull-down. You see the Workbasket window shown in Figure 24 on page 43.

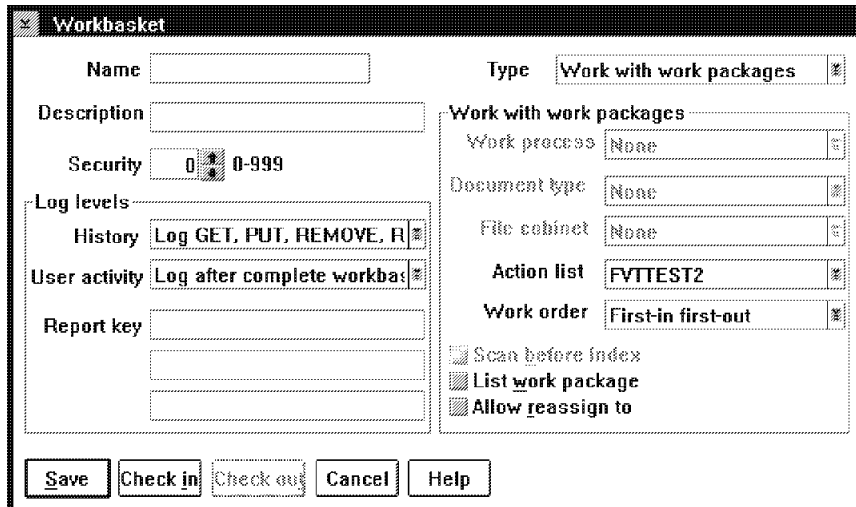


Figure 24. Workbasket Window

3. Type the name for the new workbasket in the **Name** entry field. You can type up to 10 characters, including digits and special symbols. The name must be unique for a workbasket. The name is displayed in uppercase letters when you save the workbasket or check it in. This is a required field.
4. Type a description for the workbasket in the **Description** entry field. You can type up to 30 characters, including digits and special symbols. This is a required field.
5. Use the **Security** spin button to select a security code level, or type a security level. You can select from 0 to 999. This field controls a user's access to the workbasket. A user can access the workbasket only if the security value of the workbasket falls within the user's security range. The Workfolder Application Facility system administrator defines a security range for users in their user ID profiles. For more information on user ID profiles, see the *IBM ImagePlus Workfolder Application Facility for AS/400: System Administration Guide*. The default value for a new workbasket is 0.
6. Select a **History** log level from the **Log levels** group box. During logging, Workfolder Application Facility accumulates and stores information about the activities associated with each work package. You can select:

Work package history not logged

To not record work package history.

Log GET, PUT, REMOVE, RETURN

To record information each time a work package is assigned to a workbasket, retrieved from a workbasket, returned to a workbasket, and removed from a workbasket.

Level 1 and workbasket keys

To record information each time a work package is assigned to a workbasket, retrieved from a workbasket, returned to a workbasket, and removed from a workbasket. This choice also logs each time a function key is used.

Level 2 and workbasket options

To record information each time a work package is assigned to a workbasket, retrieved from a workbasket, returned to a workbasket, and removed from a workbasket. This choice also logs each time a function key or option code is used.

If you cannot see all of the text in the drop-down list, use the horizontal and vertical scroll bars to display any additional text.

The default value for a new workbasket is **Log GET, PUT, REMOVE, RETURN**. This is a required field.

At runtime, you can access this information using Application System/400 (AS/400) Query, an IBM licensed program that produces reports from information selected from the Workfolder Application Facility data files.

7. Select a **User activity** log level from the **Log levels** group box. During logging, Workfolder Application Facility accumulates and records information each time a user accesses the workbasket or uses a function key. You can select:

User activity not logged

To not log user activity.

Log after complete workbasket

To log user activity only after the user completes all workbasket processing and exits the workbasket.

Log after complete function

To log user activity only after the user completes each workbasket function, but before the user exits the workbasket.

If you cannot see all of the text in the drop-down list, use the horizontal and vertical scroll bars to display any additional text. The default value for a new workbasket is **Log after complete workbasket**. This is a required field.

8. Type keywords that you want to be stored in a Workfolder Application Facility workbasket history file along with user activity and work package logging information in the **Report key** entry fields. These keywords can help you query the workbasket log files. You can type up to 15 characters, including digits and special symbols, in each of the three entry fields. These entry fields are not available if you select **Work package history not logged** from the **History** drop-down list and **User activity not logged** from the **User activity** drop-down list. These keywords are displayed in uppercase letters when you save the workbasket or check it in.
9. Select a workbasket type in the **Type** field. The number in parentheses after each workbasket type is the number assigned to the workbasket type on Workfolder Application Facility. You can select:

Scan documents (01)

To create a workbasket that accepts documents from the scanner and starts them on a work process.

Index folder documents (02)

To create a workbasket that accepts documents that have been scanned into the system and are waiting to be indexed into Workfolder Application Facility folders.

Index documents (03)

To create a workbasket that accepts documents that have been scanned into the system and are waiting to be indexed into a Workfolder Application Facility file cabinet.

Folder scan and index (04)

To create a workbasket that accepts Workfolder Application Facility documents from the scanner, indexes them into folders, and starts them on a work process.

Document scan and index (05)

To create a workbasket that accepts Workfolder Application Facility documents from the scanner, indexes them into file cabinets, and starts them on a work process.

Work with work packages (06)

To create a workbasket that displays a list of the documents in the folder or information related to a single document in a file cabinet.

User-defined (50–99)

To create a workbasket that calls a user exit. Workfolder Application Facility numbers these workbaskets sequentially from 50 to 99.

Workfolder Application Facility defines workbasket types. The selection you make in the **Type** field determines the choices that are available in the group box below the **Type** field. This choice is not available when you open a workbasket in update mode. For more information on Work Management Builder editing modes, see “Working in Different Edit Modes” on page 25. The default value for a new workbasket is **Work with work packages**. This is a required field.

10. Select a work process name from the **Work process** drop-down list. This choice is available for the following workbasket types:
 - Scan documents (01)
 - Folder scan and index (04)
 - Document scan and index (05)
 - User-defined (50–99)

The default value for a new workbasket is **None**. The value you select for **Work process** is used as the default value by Workfolder Application Facility for scanning and indexing. This field is optional.

11. Select a document type from the **Document type** drop-down list. Document types are defined on Workfolder Application Facility. This choice is available for the following workbasket types:
 - Scan documents (01)
 - Index folder documents (02)

- Index documents (03)
- Folder scan and index (04)
- Document scan and index (05)
- User-defined (50–99)

The value you select for **Document type** is used as the default value by Workfolder Application Facility for scanning and indexing. The default value for a new workbasket is **None**. This field is required for **Scan documents** and optional for the other valid types.

12. Select a file cabinet code from the **File cabinet** drop-down list. File cabinet codes are defined on Workfolder Application Facility. This choice is available for the following workbasket types:

- Index documents (03)
- Document scan and index (05)
- User-defined (50–99)

The value you select for **File cabinet** is used as the default value by Workfolder Application Facility for scanning and indexing. The default value for a new workbasket is **None**. This field is optional.

13. Select the name of an action list from the **Action list** drop-down list. Only action lists that are appropriate to the type of workbasket you select are listed. Index action lists are available for the following workbasket types:

- Index folder documents (02)
- Index documents (03)
- Folder scan and index (04)
- Document scan and index (05)

Work action lists are available for the following workbasket type:

- Work with work packages (06)

Both index action lists and work action lists are available for the following workbasket type:

- User-defined (50–99)

If you select a new action list as the default for the workbasket, you are prompted to check in the new action list before you check in the workbasket. The default value for **Action list** is the first action list in the list. This field is optional for **User-defined** and required for the other valid types.

14. Select a work order from the **Work order** drop-down list. This choice is available for the following workbasket types:

- Index folder documents (02)
- Index documents (03)
- Work with work packages (06)
- User-defined (50–99)

You can select:

First-in first-out	To dispatch work packages in the workbasket in the order in which they arrive.
Last-in first-out	To dispatch the last work package in the workbasket to arrive first.
Priority	To dispatch work packages in the workbasket according to the priority they were assigned when they were created.

This field is optional for **User-defined** and required for the other valid types. The default value for a new workbasket is **First-in first-out**.

15. Click on the **Scan before index** check box if you want to scan the documents in the workbasket before they are indexed. If you want to scan the documents in the workbasket after they are indexed, leave the check box blank. This choice is available for the following workbasket types:

- Folder scan and index (04)
- Document scan and index (05)
- User-defined (50–99)

The default value for a new workbasket is blank.

16. Click on the **List work package** check box if you want to display a list of all work packages at this workbasket so that the user can select any work package in random order. Leave the check box blank if you want to display the work packages to the user in the order you specify in the **Work order** field. This choice is available for the following workbasket types:

- Index folder documents (02)
- Index documents (03)
- Work with work packages (06)
- User-defined (50–99)

The default value for a new workbasket is blank.

17. Click on the **Allow reassign to** check box if you want the user to reassign work packages to this workbasket. If you do not want users to reassign work packages to this workbasket, leave the check box blank. This choice is available for the following workbasket types:

- Index folder documents (02)
- Index documents (03)
- Work with work packages (06)
- User-defined (50–99)

The default value for a new workbasket is blank.

18. Click on one of the following push buttons:

Save	To save the information for this workbasket and close the window without checking in the workbasket. The information is saved locally on your workstation. Work Management Builder verifies the information in the window for valid values before saving the workbasket.
-------------	--

- Check in** To save the information for this workbasket, check in the workbasket, and close the window. Work Management Builder verifies the information in the window for valid values before checking in the workbasket. This push button is available only if you are logged on to Workfolder Application Facility.
- Check out** To check out the workbasket if you are working in browse mode without closing the window. The data is refreshed with the most recent data from Workfolder Application Facility. The Workbasket window switches from browse mode to update mode, and you can make changes to the workbasket. This push button is available only if you are logged on to Workfolder Application Facility.
- Cancel** To cancel the Workbasket window without saving changes to a workbasket. An unnamed icon is displayed in the Workbaskets window. This icon represents the workbasket that you cancelled. When you close the Workbasket container window, the icon is removed.

Context-sensitive help is always available. Press F1 or click on the **Help** push button to display online help.

Renaming a Workbasket

When you create a new workbasket, you must give it a unique name. If a workbasket with the same name already exists on your workstation, you are prompted to change the name of the new workbasket when you click on the **Save** or the **Check in** push button in the Workbasket window.

If a workbasket with the same name already exists on Workfolder Application Facility, you are prompted to change the name when you click on the **Check in** push button in the Workbasket window, or select **Check in** from the **Selected** pull-down in the Workbaskets container window. For more information on changing the name of a workbasket, see “Resolving Name Conflicts” on page 29.

Updating a Workbasket

To update an existing workbasket:

1. Make sure you have checked out the workbasket. If not, select the icon representing the workbasket you want to change and select **Check out** from the **Selected** pull-down in the Workbaskets container window. The icon contains a check mark to indicate that the workbasket is checked out.
2. Double-click on the icon. You can also select the workbasket icon, then select **Open** from the **Selected** pull-down. You see the Workbasket window shown in Figure 24 on page 43. The window displays the information that was saved the last time the workbasket was saved locally or checked in to Workfolder Application Facility.

3. Update the fields as described in “Creating a Workbasket” on page 42. You can change all of the fields except the **Name** entry field and the **Type** drop-down list.
4. When you have made all of your changes, click on one of the following push buttons:

- | | |
|-----------------|--|
| Save | To save the information for this workbasket and close the window without checking in the workbasket. The information is saved locally on your workstation. Work Management Builder verifies the information in the window for valid values before saving the workbasket. |
| Check in | To save the information for this workbasket, check in the workbasket, and close the window. Work Management Builder verifies the information in the window for valid values before checking in the workbasket. This push button is available only if you are logged on to Workfolder Application Facility. |
| Cancel | To cancel the Workbasket window without saving changes to the workbasket. |

Context-sensitive help is always available. Press F1 or click on the **Help** push button to display online help.

Browsing a Workbasket

You can open a workbasket in browse mode that you have not checked out. However, you cannot change any of the fields. See “Working in Different Edit Modes” on page 25 for a description of Work Management Builder editing modes.

To browse a workbasket:

1. Double-click on the icon representing the workbasket you want to browse in the Workbaskets container window. You can also select the workbasket icon, then select **Open** from the **Selected** pull-down. You see the Workbasket window shown in Figure 24 on page 43.
2. When you have finished viewing the workbasket, click on one of the following push buttons:

Check out	To check out the workbasket without closing the window. The data is refreshed with the most recent data from Workfolder Application Facility. The Workbasket window switches from browse mode to update mode, and you can make changes to the workbasket. This push button is available only if you are logged on to Workfolder Application Facility.
Cancel	To cancel the Workbasket window.

Context-sensitive help is always available. Press F1 or click on the **Help** push button to display online help.

Closing a Workbasket

To close a workbasket, select **Close** from the title bar pull-down in the Workbasket window. You are prompted to save any data that you have not yet saved.

- Click on the **Yes** push button to save the information for the workbasket and close the window. Work Management Builder verifies the information in the window for valid values before saving the workbasket.
- Click on the **No** push button to close the Workbasket window without saving the changes. If the workbasket has never been saved, an unnamed icon is displayed in the Workbaskets window. This icon represents the workbasket that you did not save. When you close the Workbaskets container window, the icon is removed.

Chapter 7. Working with Work Processes

The Workfolder Application Facility work management process lets you automate your flow of work by creating work processes. A *work process* is a set of functions that defines the rules and paths through which a work package flows. A *work package* consists of one or more documents that move together from one place to another in a work process. For example, a work package might contain a loan application, a credit report, and an appraisal statement.

- A *collection point* is a place in a work process that holds a work package for a specified time or reason. After certain criteria are met, the work package is sent to the next step in the work process.
- A *decision point* is a place in a work process that determines the path that a work package follows based on criteria that you define. For example, these choices can be based on line-of-business data, work management data, or the function key the user pressed.
- A *path* describes the flow of a work package within a work process. A path can also integrate the flow of work with a line-of-business application through user exits. You can use the Work Management Builder work process editor to create a graphical representation of the paths a work package takes through a work process.

In Work Management Builder, each work process is an object that is represented by a work process icon. These work process objects are defined and displayed in the Work Processes container window. A sample Work Processes container window is shown in Figure 25.

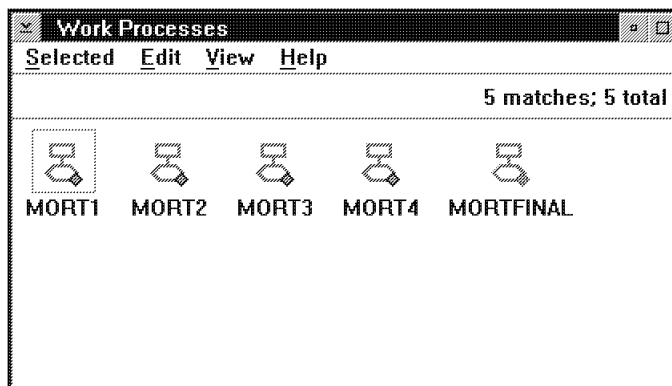


Figure 25. Work Processes Container Window

From the Work Processes container window, you can open, check out, release, and check in existing work processes, and create new work processes.

Creating a Work Process

To create a new work process:

1. Double-click on the Work Processes icon in the Work Management Builder window. You can also select the Work Processes icon, then select **Open** from the **Selected** pull-down. You see the Work Processes container window shown in Figure 25 on page 51.
2. Select **Create another** from the **Edit** pull-down. You see the Work Process window shown in Figure 26. The title bar of the window reads **New Work Process** to indicate that you are in create mode. For more information on Work Management Builder editing modes, see “Working in Different Edit Modes” on page 25.

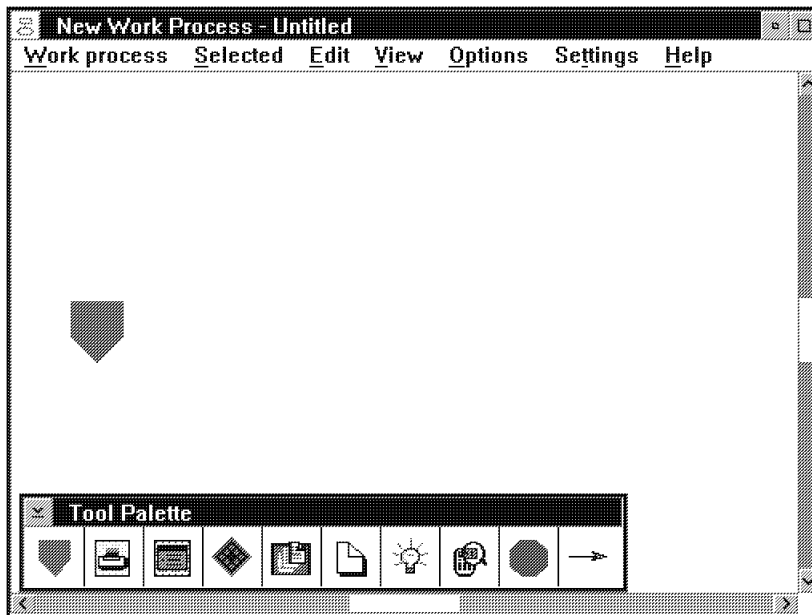


Figure 26. Work Process Window

3. Make sure that the size and orientation of your drawing surface are correct for your work process diagram. For more information on specifying the size of the drawing surface, see “Changing the Size of the Drawing Surface” on page 82.
4. Use the Work Process window to create a graphical representation of a work process, which is composed of nodes and connectors that specify the components of the work process and its path. A detailed description of the Work Process window and the procedures for creating a work process is contained in Chapter 8, “Using the Work Process Window” on page 56.
5. Specify a name and description for the work process. For more information on naming a work process, see “Naming a Work Process” on page 76.

6. Verify the work process after you create and name it. See “Verifying a Work Process” on page 77 for information on verifying the work process.
7. Select one of the following from the **Work process** pull-down:

Save work process

To save the information for this work process with its current name. The information is saved locally on your workstation.

Save work process as

To save the information for this work process with a different name. The information is saved locally on your workstation.

Check in

To save the information for this work process and check in the work process. This selection is available only if you are logged on to Workfolder Application Facility. Work Management Builder verifies the work process diagram before it is checked in to Workfolder Application Facility.

Context-sensitive help is always available. Press F1 to display online help.

Renaming a Work Process

When you create a new work process, you must give it a unique name. If a work process with the same name already exists on your workstation, you are prompted to change the name of the new work process when you select **Save work process** or **Save work process as** from the **Work process** pull-down in the Work Process window.

If a work process with the same name already exists on Workfolder Application Facility, you are prompted to change the name of the new work process when you select **Check in** from the **Selected** pull-down in the Work Processes container window, or from the **Work process** pull-down in the Work Process window. For more information on changing the name of a work process, see “Resolving Name Conflicts” on page 29.

Updating a Work Process

To update a work process that exists on Workfolder Application Facility:

1. Make sure that you have checked out the work process. If not, select the icon representing the work process you want to change and select **Check out** from the **Selected** pull-down in the Work Processes container window. The icon contains a check mark to indicate that the work process is checked out.
2. Double-click on the icon. You can also select the work process icon and then select **Open** from the **Selected** pull-down. You see the Work Process window shown in Figure 26 on page 52. The title bar of the window reads **Update Work Process** to indicate that you are in update mode. For more information on Work Management Builder editing modes, see “Working in Different Edit Modes” on page 25.

3. Update the work process diagram as described in Chapter 8, “Using the Work Process Window” on page 56.
4. Verify the work process after you have made all of the changes. See “Verifying a Work Process” on page 77 for information on verifying the work process.
5. Select one of the following from the **Work process** pull-down:

Save work process

To save the information for this work process with its current name. The information is saved locally on your workstation.

Save work process as

To save the information for this work process with a different name. The information is saved locally on your workstation.

Check in

To save the information for this work process and check in the work process. This selection is available only if you are logged on to Workfolder Application Facility. Work Management Builder verifies the work process diagram before it is checked in to Workfolder Application Facility.

Context-sensitive help is always available. Press F1 to display online help.

Browsing a Work Process

You can open a work process in browse mode that you have not checked out. You can make minor changes to the work process diagram in browse mode (for example, cut, copy, paste, and move). You can then save the changed work process diagram with a different name. To browse a work process:

1. Double-click on the icon representing the work process you want to browse in the Work Processes container window. You can also select the work process icon and then select **Open** from the **Selected** pull-down. You see the Work Process window shown in Figure 26 on page 52. The title bar of the window reads **Browse Work Process** to indicate that you are in browse mode. For more information on Work Management Builder editing modes, see Chapter 8, “Using the Work Process Window” on page 56.
2. When you have finished viewing the work process or making minor changes, select one of the following:

Save work process as from the Work process pull-down

To save the information for this work process with a different name. The information is saved locally on your workstation. The title bar of the window changes to **New Work Process** to indicate that you are working with a new work process.

Check out from the Work process pull-down

To check out the work process without closing the Work Process window. The data is refreshed with the most recent data from Workfolder Application Facility. The title bar of the window changes to **Update Work Process** to indicate that

you are in update mode. You can make changes to the work process with its existing name.

This choice is available only if you are logged on to Workfolder Application Facility.

Close from the title bar pull-down

To close the Work Process window.

Closing a Work Process

To close a work process, select **Close** from the title bar pull-down in the Work Process window. You are prompted to save any data that you have not yet saved.

- Click on the **Yes** push button to save the data for the work process and close the window.
- Click on the **No** push button to close the Work Process window without saving the changes. If the work process has never been saved, an unnamed icon is displayed in the Work Processes window. This icon represents the work process that you did not save. When you close the Work Processes container window, the icon is removed.
- Click on the **Cancel** push button to keep the Work Process window open.

Chapter 8. Using the Work Process Window

A work process diagram is a graphical representation of the flow of work within an enterprise. The diagram is composed of nodes and connectors. The nodes define the locations where a work package is processed or assembled, and the connectors define the path that the work package takes through the work process.

The Work Process window provides the tools you need to interactively lay out a diagram that defines your work process. You can use the *drawing surface* to create, update, and display a work process. This area can be zoomed and scrolled.

Each new work process diagram contains a begin node. For information on moving this node to a different location, see "Moving a Node" on page 63.

As shown in Figure 27, the Work Process window can contain the following additional windows:

- Tool Palette
- Overview
- Clipboard View

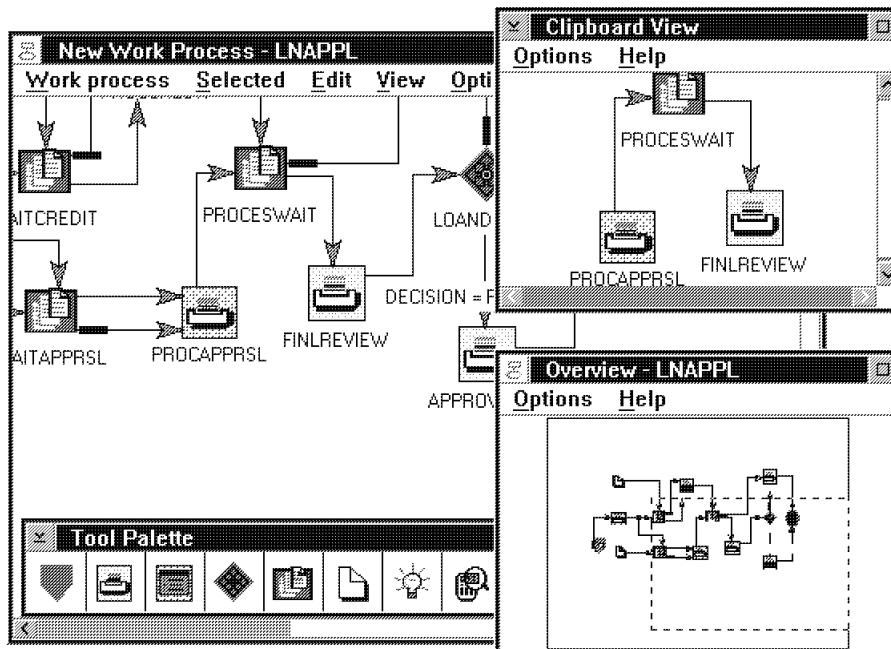


Figure 27. Work Process, Tool Palette, Clipboard View, and Overview Windows

- The Tool Palette window contains the tools that you need to lay out the diagram that defines your work process, as shown in Figure 28 on page 57.

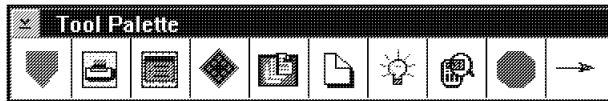


Figure 28. Tool Palette Window

The first nine tools in the window let you create nodes in your diagram. The remaining tool lets you create a connector that connects two nodes and indicates the path that information takes through the work process. For information on using the nodes and connectors in the Tool Palette window, see “Using Nodes and Connectors.”

- The Overview window shows the entire diagram that you are creating or updating. For information on displaying the Overview window, see “Using the Overview Window” on page 84.
- The Clipboard View window displays the contents of the clipboard. For information on displaying the Clipboard View window, see “Using the Clipboard View Window” on page 86.

Using Nodes and Connectors

Your work process diagram is made up of nodes and connectors, which specify the components of the work process and its path. You can use the following nodes and connectors to create or update your work process diagram:



A *begin node* begins the work process. A begin node indicates how the work process is initiated when it is run on Workfolder Application Facility.

Every new work process diagram contains a begin node. However, you can delete this begin node and add another if you want to position it somewhere else in your work process diagram. The work process diagram must have one and only one begin node.

A begin node can represent a scanner or a line-of-business application, or it can represent a user action. The appearance of the begin node in your work process diagram is determined by how the work process is initiated. For more information on describing a begin node, see “Describing a Begin Node” on page 66.



A *work node* associates a workbasket and an action list for a specific point in a work process. A work node represents a point in the work process where work is performed.

For more information on describing a work node, see “Describing a Work Node” on page 66.



A *user exit node* lets a work process call a line-of-business application. Values from the work process can then be passed to the line-of-business application, and control values from the line-of-business application can be passed back to the work process.

For more information on describing a user exit node, see “Describing a User Exit Node” on page 68.



A *decision point node* selects the next step in the work process. Decision branches choose the path that the work process follows based on line-of-business information, work management information, or the function key a user uses.

For more information on describing a decision point node, see “Describing a Decision Point Node” on page 68.



A *collection point node* collects information from different sources before passing it on. A collection point holds and manages work packages that cannot be processed completely until additional information is received.

For more information on describing a collection point node, see “Describing a Collection Point Node” on page 70.



A *document node* represents a document in the work process. The document types that are available are defined on Workfolder Application Facility. A document node can only be connected to a collection point node.

For more information on describing a document node, see “Describing a Document Node” on page 72.



A *customer-defined event node* represents an event in the work process that is triggered by a line-of-business application through a call to a Workfolder Application Facility Match Collection Point (MATCHCP) application programming interface (API). For more information on the MATCHCP API, see *IBM ImagePlus Workfolder Application Facility for AS/400: Programming Interfaces Guide*.

The user specifies the event type, which is a value from 50 to 99, and text representing the match criterion for the event. A user-defined event node can only be connected to a collection point node.

For more information on describing a user-defined event node, see *IBM ImagePlus Workfolder Application Facility for AS/400: Programming Interfaces Guide*.



An *assign value node* copies a value into a work process variable. This variable can then be accessed later in the work process by a succeeding step or by a user exit program.

For more information on describing an assign value node, see “Describing an Assign Value Node” on page 74.



A *stop node* stops the work process. A stop node indicates how the work process is stopped when it is run on Workfolder Application Facility.

A stop node can represent a transfer to a case processing queue, a queue of closed cases, or simply the ending of a work process. The appearance of the stop node in your work process diagram is determined by how the work process is stopped.

For more information on describing a stop node, see “Describing a Stop Node” on page 75.



A *connector* connects a source node to one or more target nodes. At the target node end, an arrowhead is displayed that points to the target node. A decision branch connector also displays its variable and value condition along the connector.

You can use the following connectors to create or update your work process diagram:

Decision branch connector

Represents the decision choice and path to be taken from a decision point node when the value of the variable associated with the decision point matches the value associated with the decision branch.

Exception branch for a decision point connector

Represents the decision choice and path to be taken from a decision point node when the value of the variable associated with the decision point does not match any values associated with the decision branches of the decision point. A solid rectangle is displayed at the source end of the exception connector to distinguish it from other connectors.

Collection point event list branch connector

Represents the path to be taken from a collection point node when selected events are complete.

Exception branch for a collection point connector

Represents the path to be taken from a collection point node in the exception condition where a maximum time period has ended and the selected events are not complete. A solid rectangle is displayed at the source end of the exception connector to distinguish it from other connectors.

Directional connector

Indicates the path to be taken when the selected events are complete.

Parallel connector

Specifies parallel processing to begin. The connector is made up of one source branch and many target branches. Work Management Builder automatically creates this connector and replaces multiple outbound connectors that have the same source node and satisfy the same condition and function.

Creating a Node

A node is composed of a symbol and possibly a text label. For a work, collection point, decision point, document, user-defined event, user exit, or stop (queue) node, its name is displayed in a text label. For an assign value node, the variable and value are displayed in the text label.

To create a node:

1. Move your mouse pointer over the node that you want to create in the Tool Palette window.
2. Press and hold mouse button 2. This selects the node. Drag the node to the drawing surface and position it where you want it to appear in the work process diagram. The node is displayed as an outlined shape. If you select and drag the wrong node, you can clear it by pressing Esc before you release mouse button 2.
3. Release mouse button 2. The node is positioned in the work process diagram.

To specify additional information about a node, double-click mouse button 1 on the node in the work process diagram. You can also select the node, then select **Open** from the **Selected** pull-down. A window is displayed that allows you to specify additional information about the node. You must be in create mode or update mode to change the information in the window.

To deselect the selected node, double-click mouse button 1 on a blank area of the drawing surface.

For more information on describing a node, see “Describing Nodes and Connectors” on page 66.

Creating a Connector

A connector connects a source node to one or more target nodes. A connector can also describe the criteria that determine the path your work process diagram takes from a decision point node or a collection point node.

To create a connector:

1. Move your mouse pointer over the connector in the Tool Palette window.
2. Press and hold mouse button 2. The connector is selected. Drag the connector to the drawing surface. The connector is displayed as a pencil.
3. Move the pencil over the middle of the source node on the work process diagram.
4. Release mouse button 2.
5. With no mouse button pressed, move the pointer over the middle of the target node on the work process diagram.
6. Double-click mouse button 2 over the middle of the target node to complete the action, or press Esc to cancel the action.

The connector is displayed as a line connecting the source node and the target node. An arrow is displayed at the target end of the connector, pointing to the target node.

To specify additional information about a connector from a collection point node or a decision point node, double-click mouse button 1 on the connector in the work process diagram. You can also select the connector, then select **Open** from the **Selected** pull-down. A window is displayed that allows you to specify additional information about the connector. You must be in create mode or update mode to change the information in the window.

To deselect the selected connector, double-click mouse button 1 on a blank area of the drawing surface.

For more information on describing a connector, see “Describing Nodes and Connectors” on page 66.

Connecting Nodes

The work process editor has few restrictions on the types of nodes that you can connect to each other. Table 2 on page 62 shows the nodes that you can connect with an outbound connector.

Table 2. Connection Rules for the Work Process Editor

		Valid Target Node from an Outbound Connector									
Source Node	Begin	Work	Collection Point	Decision Point	Document	User-defined Event	User Exit	Assign Value	Stop		
Begin	No	Yes	Yes	Yes	No	No	Yes	Yes	No	Yes	No
Work	No	Yes	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes
Collection Point	No	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes
Decision Point	No	Yes	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes
Document	No	No	Yes	No	No	No	No	No	No	No	No
User-defined Event	No	No	Yes	No	No	No	No	No	No	No	No
User Exit	No	Yes	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes
Assign Value	No	Yes	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes
Stop	No	No	No	No	No	No	No	No	No	No	No

Manipulating Nodes and Connectors

You can manipulate a node or connector by dragging the node or connector with the mouse or by using the menu bar selections. If you use a mouse, you can cancel a procedure by holding down mouse button 2 while you press Esc.

You can also cancel your last editing procedure by selecting **Undo** from the **Edit** pull-down. **Undo** is available after you drag a node or connector onto the drawing surface. You can select **Undo** to cancel the following editing actions:

- Adding, deleting, moving, cutting, pasting, and sizing a node or connector
- Adding, deleting, and moving a bend point
- Changing the application information linked to a node or connector. If you select **Undo**, the text label is changed back to its previous label and the icon form is changed back to its previous form.

Moving a Node

To move a node by using the mouse:

1. Move the mouse pointer over the node that you want to move in the work process diagram.
2. Press and hold mouse button 2. This selects the node. Drag the mouse pointer to a different location on the drawing surface. The node is displayed as an outlined shape.
3. Release mouse button 2. The node is redrawn at the new location. All of the connectors attached to the node are reshaped and redrawn to show that they are still attached to the node.

Some nodes can be displayed on top of one another in the work process diagram. You can bring a selected node to the foreground or move it to the background. To move a selected node in front of or behind other nodes, select **Place in foreground** or **Place in background**, respectively, from the **Selected** pull-down.

Clearing a Node

You can clear a node from the work process diagram and temporarily store a copy of the node in the clipboard, or you can clear the node without storing a copy in the clipboard. If you store a copy in the clipboard, you can use the node again in your work process diagram.

Clearing a Node without a Copy to the Clipboard

To clear a node without storing a copy in the clipboard:

1. Click on the node that you want to clear in the work process diagram to select it.
2. Select **Clear** from the **Edit** pull-down. The node and the connectors attached to it are cleared from the work process diagram.

Clearing a Node with a Copy to the Clipboard

To clear a node and store a copy in the clipboard:

1. Click on the node that you want to clear in the work process diagram to select it.
2. Select **Cut** from the **Edit** pull-down. The node is deleted from the diagram and placed in the clipboard.

Note that only the node is copied to the clipboard, not its connectors, unless you select the node and its connectors together.

To use the node again in the work process diagram:

1. Select **Paste** from the **Edit** pull-down. The node is displayed again as an outlined shape.
2. Use the mouse to reposition the node in the work process diagram. The mouse pointer is shaped like a paintbrush.
3. Click mouse button 2 to position the node in the work process diagram.

You can use **Cut** and **Paste** to position the same node in more than one place in the work process diagram. The node you cut remains in the clipboard until you select another node and use **Cut** or **Copy** again.

To display the contents of the clipboard, select **Clipboard view** from the **Options** pull-down. For more information on the clipboard, see “Using the Clipboard View Window” on page 86.

Copying a Node

You can copy nodes, connectors, or a combination of nodes and connectors from one place to another in the work process diagram. To copy one or more nodes or connectors:

1. Click on the node or connector that you want to copy in the work process diagram to select it.
2. Select **Copy** from the **Edit** pull-down. The node or connector is copied to the clipboard.
3. Select **Paste** from the **Edit** pull-down. The node or connector is displayed again as an outlined shape.
4. Use the mouse to reposition the node or connector in the work process diagram. The mouse pointer is shaped like a paintbrush.
5. Click mouse button 2 to position the node or connector in the work process diagram.

Scaling a Node

To make a node smaller or larger:

1. Select **Size handles** from the **Options** pull-down. All of the nodes in the work process diagram display *size handles*, which are small squares defining the outside edges of the node.
2. Click on the node that you want to size in the work process diagram to select it. The size handles are also selected.
3. Position the mouse pointer on a small square on one of the corners of the node you want to make smaller or larger.
4. Press and hold mouse button 2. Drag the small square toward the center of the node to reduce it, or away to enlarge it.
5. To change the size and proportion of the node, drag a small square on the top or side of the node, depending on how you want the node repropotioned.
6. Release mouse button 2. The node is redrawn in its new size and proportion. All of the connectors attached to the node are reshaped and redrawn to show that they are still attached to the node.

Adding a Bend in a Connector

You might want to add a bend in a connector to unclutter or streamline your work process diagram. Figure 1 on page 4 shows bends in a number of the connectors, including the connector between the CREDITRPT and WAITCREDIT nodes.

To add a bend in a connector:

1. Click on the connector to select it. The connector displays *bend points*, which are small squares defining the beginning, end, and any bends in a connector. To display bend points for all of the connectors in your work process diagram, select **Bend points** from the **Options** pull-down.
2. Double-click mouse button 2 on the connector where you want to add a bend point. You can also press and hold mouse button 2 on the connector, then move the pointer where you want the bend point positioned. Release mouse button 2.

Moving a Bend in a Connector

You might want to move a bend in a connector to eliminate overlapping connectors in your work process diagram. To move the bend point in a connector:

1. Click on the connector to select it. The connector displays bend points, which are small squares defining the beginning, end, and any bends in a connector. To display bend points for all of the connectors in your work process diagram, select **Bend points** from the **Options** pull-down.
2. Position the mouse pointer on a small square on the bend in the connector that you want to move.
3. Press and hold mouse button 2. Drag the small square to the new position in the work process diagram. The connector is displayed again as a line that changes shape as you reposition the bend point.
4. Release mouse button 2. The bend point is redrawn at the new location.

Describing Nodes and Connectors

You can specify additional information about the nodes and connectors in your work process diagram. For example, this information can describe the node or connector, or define criteria for moving through the work process.

Context-sensitive help is always available. Press F1 or click on the **Help** push button to display online help.

Describing a Begin Node

Follow these steps to specify where the work process is initiated.

1. Double-click mouse button 1 on the begin node symbol in the work process diagram. As shown in Figure 29, you see the Begin Node window.

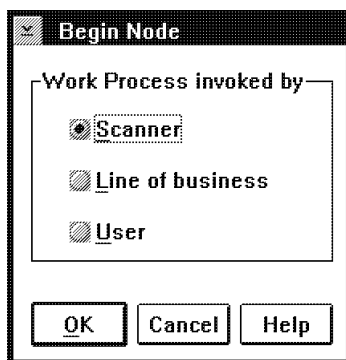


Figure 29. Begin Node Window

2. Select the initiation point for the work process from the **Work process invoked by** group box. You can select one of the following radio buttons:

Scanner To initiate the work process from a scanner.

Line of business

To initiate the work process from a line-of-business application.

User To allow the user to initiate the work process.

3. Click on one of the following push buttons:

OK To save the values that you specify and close the Begin Node window.

Cancel To close the Begin Node window without specifying how the work process is initiated.

Describing a Work Node

Follow these steps to associate a workbasket and action list with the selected work node.

1. Double-click mouse button 1 on the work node in the work process diagram. You see the Work Node window shown in Figure 30 on page 67.

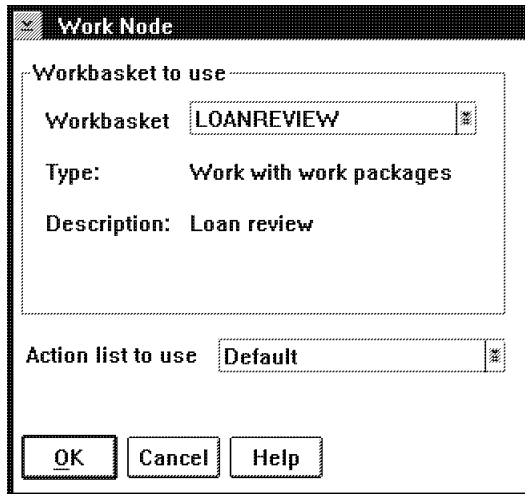


Figure 30. Work Node Window

2. Select the name of a workbasket from the **Workbasket** drop-down list in the **Workbasket to use** group box. The name is displayed below the node when you click on the **OK** push button. The **Type** and the **Description** display fields change automatically to reflect the workbasket you selected. The following workbasket types are not used in a work node and are not included in the **Workbasket** drop-down list:

- Scan documents (01)
- Folder scan and index (04)
- Document scan and index (05)

See Chapter 5, “Working with Action Lists” on page 36 for more information on workbasket types.

3. If you do not want to use the default action list associated with the workbasket, select another action list from the **Action list to use** drop-down list. Only action lists appropriate to the type of workbasket you select are listed. Index action lists are listed for Index folder documents (02) and Index documents (03) workbasket types. Work action lists are listed for Work with work packages (06) workbasket types. Both index and work action lists are listed for User-defined (50-99) workbasket types. For more information on associating an action list with a workbasket, see “Creating a Workbasket” on page 42.

4. Click on one of the following push buttons:

- | | |
|---------------|--|
| OK | To save the values that you specify and close the Work Node window. |
| Cancel | To close the Work Node window without describing the selected work node. |

Describing a User Exit Node

Follow these steps to specify a name for a user exit node.

1. Double-click mouse button 1 on the user exit node in the work process diagram. You see the User Exit window shown in Figure 31.

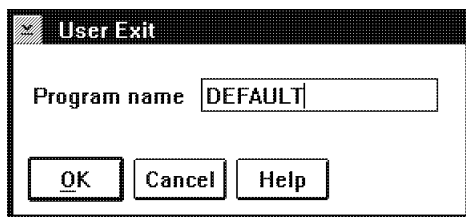


Figure 31. User Exit Window

2. Type the program name for the user exit used on Workfolder Application Facility in the **Program name** entry field. You can type up to 10 characters, including digits and special symbols. The name is displayed in uppercase letters below the node when you click on the **OK** push button. The default entry is DEFAULT.
3. Click on one of the following push buttons:
 - OK** To save the value you specify and close the User Exit window.
 - Cancel** To close the User Exit window without naming the selected user exit node.

Describing a Decision Point Node

Follow these steps to specify a name and additional information about a decision point node.

1. Double-click mouse button 1 on the decision point node in the work process diagram. You see the Decision Point window shown in Figure 32.

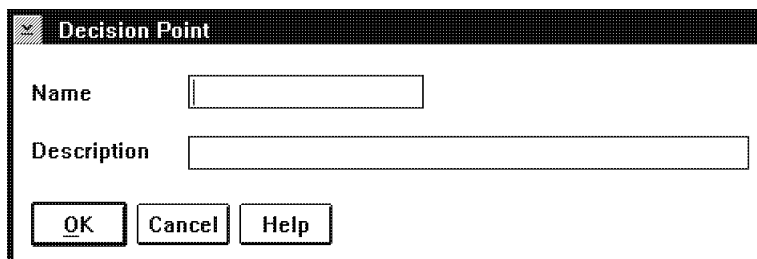


Figure 32. Decision Point Window

2. Type the name for the decision point node in the **Name** entry field. You can type up to 10 characters, including digits and special symbols. The name must be unique for a decision point node. The name is displayed in uppercase letters below the node when you click on the **OK** push button. This is a required field.

3. Type a description for the decision point node in the **Description** entry field. You can type up to 30 characters, including digits and special symbols. This is a required field.
4. Click on one of the following push buttons:
 - OK** To save the values that you specify and close the Decision Point window.
 - Cancel** To close the Decision Point window without describing the selected decision point node.

For information on describing a connector from a decision point node, see “Describing a Decision Point Connector.”

Describing a Decision Point Connector

Follow these steps to describe a connector from a decision point node.

1. Double-click mouse button 1 on the outbound connector from the decision point node in the work process diagram. You see the Decision Branch window shown in Figure 33.

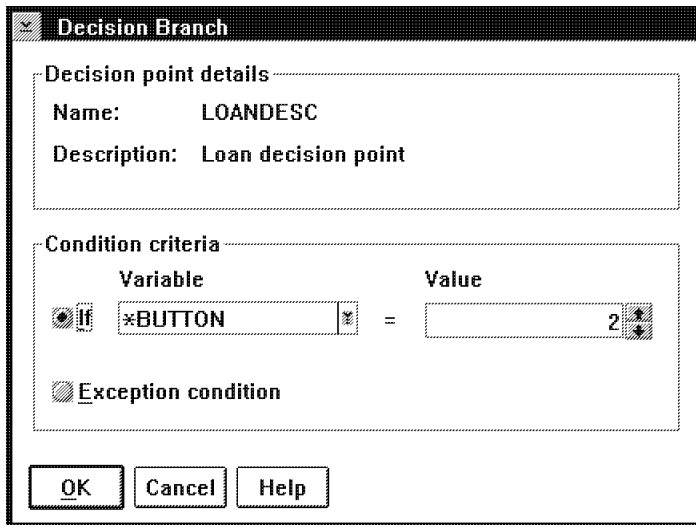


Figure 33. Decision Branch Window

The **Decision point details** group box displays the name and a description of the decision point source node for this decision branch.

2. Select a type of decision branch from the **Condition criteria** group box. The condition criteria determine whether the work proceeds to the target node. Each path from a decision point node is chosen based on the condition criteria being met. You can select one of the following radio buttons:

If To have the decision branch examine the value of a variable for meeting the condition. You must then select a **Variable** from the drop-down combination list (***BUTTON**, ***PRIORITY**, or a Workfolder Application Facility defined variable), or type a variable.

If you select ***BUTTON** from the **Variable** drop-down list, the **Value** field is a spin button, which you can use to select a number from 2 to 22, or type a number. The default value is 2. If you do not select ***BUTTON**, the **Value** field is an entry field, where you can type up to 10 characters, including digits and special symbols. The first character in a user-defined variable name cannot be an asterisk (*).

The **Value** field is required if you select the **If** radio button. The variable name and value are displayed in uppercase letters along the connector when you click on the **OK** push button.

Exception condition

To have the decision branch represent the exception condition of a decision point. An exception condition describes the path that the work process takes if the condition criteria are not met. You must define one and only one exception connector from each decision point. The exception connector has a thin solid rectangle at its source end.

3. Click on one of the following push buttons:

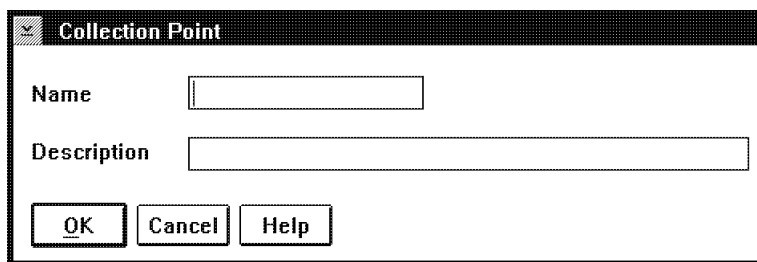
OK To save the values you specify and close the Decision Branch window.

Cancel To cancel the Decision Branch window without specifying decision criteria.

Describing a Collection Point Node

Follow these steps to specify a name and additional information about a collection point node.

1. Double-click mouse button 1 on the collection point node in the work process diagram. You see the Collection Point window shown in Figure 34.



The image shows a dialog box titled "Collection Point". It has a standard Windows-style title bar with a close button (an 'X' in a square) on the left. The main area of the dialog contains two text input fields. The first is labeled "Name" and is empty. The second is labeled "Description" and is also empty. At the bottom of the dialog, there are three buttons: "OK", "Cancel", and "Help". The "OK" button has a small underline under the letter 'O'.

Figure 34. Collection Point Window

2. Type the name for the collection point node in the **Name** entry field. You can type up to 10 characters, including digits and special symbols. The name must be unique for a collection point node. The name is displayed in uppercase letters below the node when you click on the **OK** push button. This is a required field.

3. Type a description for the collection point node in the **Description** entry field. You can type up to 30 characters, including digits and special symbols. This is a required field.
4. Click on one of the following push buttons:
 - OK** To save the values that you specify and close the Collection Point window.
 - Cancel** To close the Collection Point window without describing the selected collection point node.

For information on describing a connector from a collection point node, see “Describing a Collection Point Connector.”

Describing a Collection Point Connector

Follow these steps to describe a connector from a collection point source node.

1. Double-click mouse button 1 on the outbound connector from the collection point node in the work process diagram. You see the Collection Point Event List window shown in Figure 35.

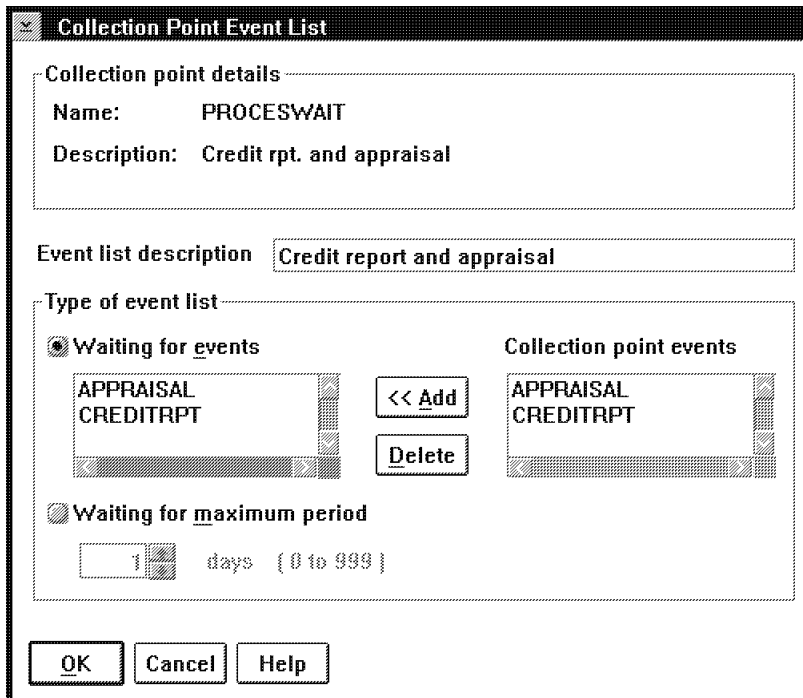


Figure 35. Collection Point Event List Window

You can use this window to define a path for the collection point node. The **Collection point details** group box displays the name and a description of the collection point source node.

2. Type a description of the events associated with the collection point node in the **Event list description** entry field. You can type up to 30 characters, including digits and special symbols. This is a required field.
3. Define your event list using the choices in the **Type of event list** group box. You can select one of the following radio buttons:

Waiting for events

To create a list of events that must take place before the work package moves on in the work process. The **Collection point events** list box displays a list of all nodes connected to a collection point that have information associated with them. Select an event from this list, then click on the **Add** push button to add the event to your list. To delete an event from the **Waiting for events** list box, select the event from this list, then click on the **Delete** push button. **Collection point events**, **Waiting for events**, the **Add** push button, and the **Delete** push button are not available unless you select the **Waiting for events** radio button.

Waiting for maximum period

To have the event list branch represent the exception condition of a collection point. Use the spin button to select the number of days before the work process continues down this path. You can select a number from 0 to 999, or type a number. The default value is 1. This spin button is not available unless you select the **Waiting for maximum period** radio button. You must define one and only one exception connector from each collection point. This branch of the work process is used only if all of the event lists from this collection point are not complete before the selected number of days. The exception connector has a thin solid rectangle at its source end.

4. Click on one of the following push buttons:
 - OK** To save the values you specify and close the Collection Point Event List window.
 - Cancel** To cancel the Collection Point Event List window without specifying an event list.

Describing a Document Node

Follow these steps to specify a name and additional information about a document node.

1. Double-click mouse button 1 on the document node in the work process diagram. You see the Document window shown in Figure 36 on page 73.

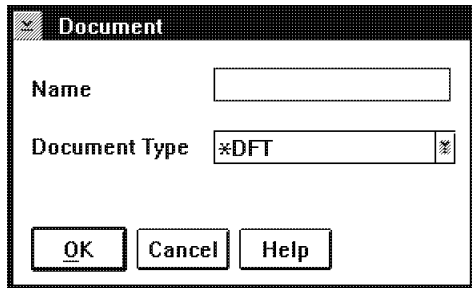


Figure 36. Document Window

2. Type the name for the document node in the **Name** field. You can type up to 10 characters, including digits and special symbols. The name is displayed in uppercase letters below the node when you click on the **OK** push button. This is a required field.
3. Select a document type from the **Document type** drop-down list. The document types are defined in Workfolder Application Facility. You can select ***ANY** to indicate that any document is accepted for this node. You can then select the document from the **Collection point events** list box on the Collection Point Event List window to indicate that any document satisfies the collection point criteria. For more information on the Collection Point Event List window, see "Describing a Collection Point Connector" on page 71.
4. Click on one of the following push buttons:
 - OK** To save the values that you specify and close the Document window.
 - Cancel** To close the Document window without describing the selected document node.

Describing a User-Defined Event Node

Follow these steps to specify a name and additional information about a user-defined event node.

1. Double-click mouse button 1 on the user-defined event node in the work process diagram. You see the User-defined Event window shown in Figure 37 on page 74.

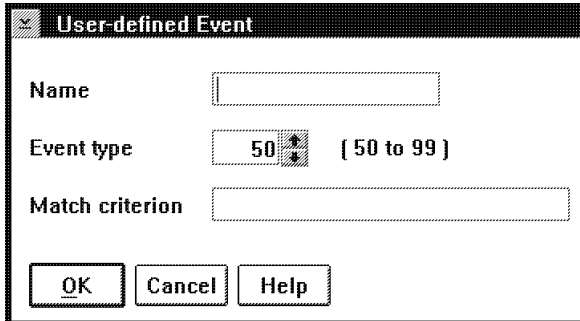


Figure 37. User-defined Event Window

2. Type the name for the user-defined event node in the **Name** entry field. You can type up to 10 characters, including digits and special symbols. The name is displayed in uppercase letters below the node when you click on the **OK** push button. This is a required field.
3. Use the **Event type** spin button to select a user-defined event type, or type a number. You can select from 50 to 99. The default value is 50.
4. Type the user-defined data value to be matched in the **Match criterion** entry field. This data value and the number you specify in the **Event type** field determine whether the event is triggered at runtime by a call to a Workfolder Application Facility MATCHCP API. For more information on the MATCHCP API, see *IBM ImagePlus Workfolder Application Facility for AS/400: Programming Interfaces Guide*.

You can type up to 40 characters, including digits and special symbols. This is a required field.

5. Click on one of the following push buttons:

- | | |
|---------------|---|
| OK | To save the values that you specify and close the User-defined Event window. |
| Cancel | To close the User-defined Event window without describing the selected user-defined event node. |

Describing an Assign Value Node

Follow these steps to specify a variable and a value for an assign value node.

1. Double-click mouse button 1 on the assign value node in the work process diagram. You see the Assign Value window shown in Figure 38 on page 75.

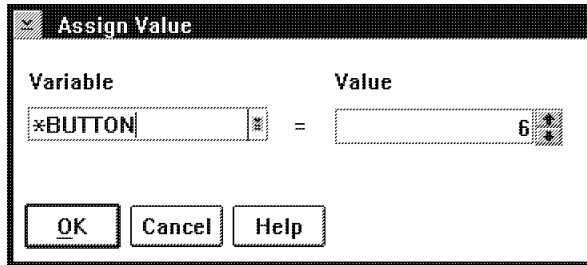


Figure 38. Assign Value Window

2. Select one of the following variables from the **Variable** drop-down combination list, or type a variable:

- *BUTTON** To assign a button value to the assign value node.
- *PRIORITY** To assign a priority value to the assign value node.

You can also select any variables that were defined in Workfolder Application Facility. If you select ***BUTTON** from the **Variable** drop-down list, the **Value** field is a spin button, which you can use to select a number from 2 to 22, or type a number. The default value is 2. If you do not select ***BUTTON**, the **Value** field is an entry field, where you can type up to 10 characters, including digits and special symbols. The first character in a user-defined variable name cannot be an asterisk (*). The variable and value are displayed in uppercase letters below the node when you click on the **OK** push button. This is a required field.

3. Click on one of the following push buttons:

- OK** To save the values you specify and close the Assign Value window.
- Cancel** To close the Assign Value window without assigning a value to the selected assign value node.

Describing a Stop Node

Follow these steps to specify how the work process is stopped.

1. Double-click mouse button 1 on the stop node in the work process diagram. You see the Stop Node window shown in Figure 39 on page 76.

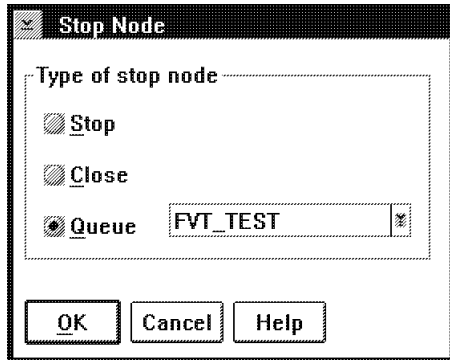


Figure 39. Stop Node Window

2. Select how the work process is stopped from the **Type of stop node** group box. You can select one of the following radio buttons:

- | | |
|--------------|---|
| Stop | To stop the work process. |
| Close | To close a folder and put it in a closed queue. It is the same as closing a case in Workfolder Application Facility processing. A close node ends the current work process and the case is not put into any workbasket or case processing queue. |
| Queue | To put a folder into a Workfolder Application Facility case processing queue. A queue is an entry into the case processing system. Therefore, a queue ends the work process. Select a queue from the Queue drop-down list. The queue names are defined on Workfolder Application Facility. |

3. Click on one of the following push buttons:

- | | |
|---------------|---|
| OK | To save the values that you specify and close the Stop Node window. |
| Cancel | To close the Stop Node window without specifying how the work process is stopped. |

Naming a Work Process

Each work process has a name and description associated with it. This name identifies the work process to Workfolder Application Facility. To name a work process:

1. Select **Work process details** from the **Work process** pull-down. You see the Work Process Details window shown in Figure 40 on page 77.

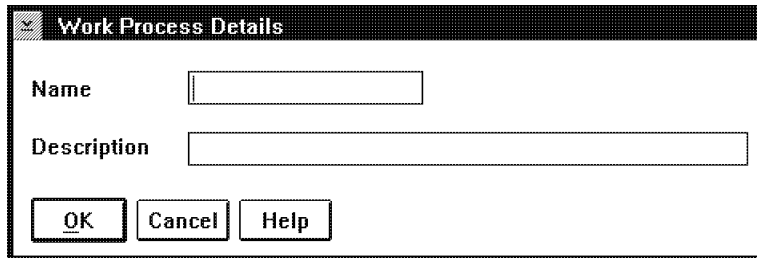


Figure 40. Work Process Details Window

2. Type the name for the new work process in the **Name** entry field. You can type up to 10 characters, including digits and special symbols. The name is displayed in uppercase letters after you click on the **OK** push button. The name must be unique for a work process. This is a required field.
3. Type a description for the work process in the **Description** entry field. You can type up to 30 characters, including digits and special symbols. This is a required field.
4. Click on one of the following push buttons:
 - OK** To save the name you specify and close the Work Process Details window.
 - Cancel** To cancel the Work Process Details window without specifying a work process name.

Context-sensitive help is always available. Press F1 or click on the **Help** push button to display online help.

Verifying a Work Process

Work Management Builder automatically applies rules on how different nodes can be connected in your work process. However, you should still verify that all of the connections are valid. Some examples of connections that are not valid are:

- No begin node or stop node
- No direct or indirect path from a begin node to another node
- No outbound or inbound connectors for nodes that require them

Work Management Builder automatically verifies a new or updated work process diagram before you check it in to Workfolder Application Facility. In addition, you can verify your work process diagram at any time. To verify a work process diagram:

1. Select **Verify diagram** from the **Work process** pull-down. You see the Verify window shown in Figure 41 on page 78.

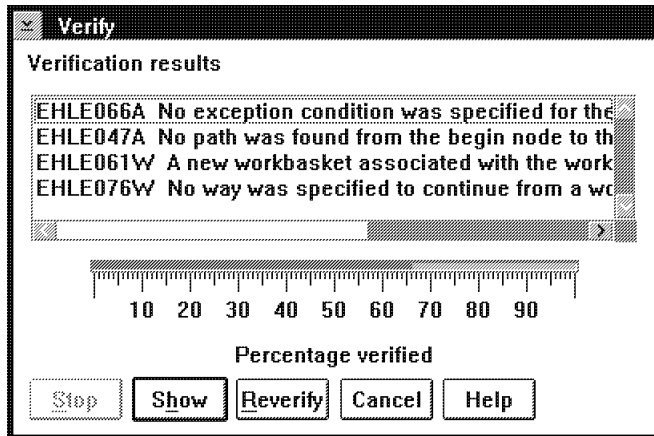


Figure 41. Verify Window

As the verification proceeds, the **Percentage verified** progress indicator shows the percentage of the work process diagram that has been verified.

2. Check the **Verification results** list box for a list of any errors. If you need additional information about an error message, select the message. Then press F1 or click on the **Help** push button. In addition, if the error can be shown in the Work Process window, you can click on the **Show** push button to display the portion of the work process diagram that contains the error. The associated incorrect nodes or connectors are highlighted. You can then correct the error and return to the Verify window. You might need to move the Verify window to select a message or click on a push button.

Not all the messages listed in the **Verification results** list box prevent the work process diagram from being verified successfully. Some messages might inform you that workbaskets or action lists that the work process refers to need to be checked in.

If you need to provide more information about a problem node or connector, double-click on the node or connector to display the window associated with it. You can also select the node or connector, then select **Open** from the **Selected** pull-down.

If your work process diagram is successfully verified, an information message is displayed in the **Verification results** list box.

3. Click on one of the following push buttons:

- Stop** To stop the verification process before it is complete.
- Reverify** To verify the work process again. You can use this push button after you click on the **Stop** push button, or after the initial verification is complete. For example, you can click on the **Reverify** push button after you correct some or all of the errors in the **Verification results** list box.

- Show** To display the node or connector associated with the selected message in the Work Process window. The node or connector is highlighted in the Work Process window. You can correct the work process diagram, then return to the Verify window. This push button is not available if the node or connector cannot be displayed in the Work Process window.
- Cancel** To close the Verify window whether or not verification is complete or has been stopped.

Context-sensitive help is always available. Press F1 or click on the **Help** push button to display online help.

Saving a Work Process

After you have created, named, and verified your work process, you must save it.

To save the work process with its current name, select **Save work process** from the **Work process** pull-down. If you have not named your work process diagram, you see the Save Work Process window shown in Figure 42.

Figure 42. Save Work Process Window

1. Type the name for the work process in the **Name** entry field. You can type up to 10 characters, including digits and special symbols. The name is displayed in uppercase letters after you click on the **OK** push button. The name must be unique for a work process. This is a required field.
2. Type a description for the work process in the **Description** entry field. You can type up to 30 characters, including digits and special symbols. This is a required field.
3. Click on one of the following push buttons:
 - OK** To save the work process with the name you specify and close the Save Work Process window.
 - Cancel** To cancel the Save Work Process window without saving the work process.

Context-sensitive help is always available. Press F1 or click on the **Help** push button to display online help.

To save a copy of the work process with a different name:

1. Select **Save work process as** from the **Work process** pull down. You see the Save Work Process As window shown in Figure 43.

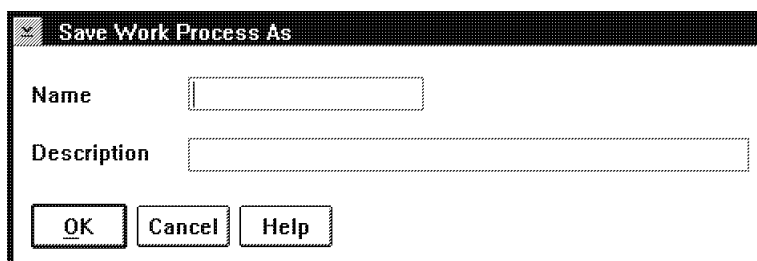


Figure 43. Save Work Process As Window

2. Type the new name for the work process in the **Name** entry field. You can type up to 10 characters, including digits and special symbols. The name is displayed in uppercase letters after you click on the **OK** push button. The name must be unique for a work process. This is a required field.
3. Type a new description for the work process in the **Description** entry field if you want to change it. You can type up to 30 characters, including digits and special symbols. This is a required field.
4. Click on one of the following push buttons:
 - OK** To save a copy of the work process with the name you specify and close the Save Work Process As window.
 - Cancel** To cancel the Save Work Process As window without changing the work process name.

Context-sensitive help is always available. Press F1 or click on the **Help** push button to display online help.

Printing a Work Process Diagram

You can print the Workfolder Application Facility text translation of a work process diagram, information associated with the work process, or the graphical representation of the diagram itself.

Printing a Text Translation

If you do not verify a work process diagram, Work Management Builder prints only the information associated with the work process, including the name and description of the work process, the date and time of creation and the last update, whether the object is checked out, and the user ID of the person who checked the object out.

If you verify a work process diagram, Work Management Builder translates certain nodes and connectors to Workfolder Application Facility commands. The text translation

of a work process diagram includes the Workfolder Application Facility commands and the information associated with these nodes and connectors.

If you verify a work process diagram before you print it, Work Management Builder prints this text translation in addition to the information that is printed if you do not verify it.

To print a text translation or the information associated with the current work process diagram:

1. Select **Print textual format** from the **Work process** pull-down in the Work Process window. You see the Print Work Process window shown in Figure 44.

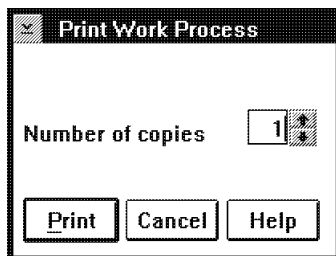


Figure 44. Print Work Process Window

2. Select the number of copies you want to print using the **Number of copies** spin button. You can print from 1 to 99 copies.
3. Click on one of the following push buttons:
 - Print** To print the specified number of copies of the selected work process on the default printer.
 - Cancel** To close the Print Work Process window without printing the selected work process.

Context-sensitive help is always available. Press F1 or click on the **Help** push button to display online help.

Printing a Graphical Representation

To print a graphical representation of a work process diagram:

1. Select **Print diagram** from the **Work process** pull-down in the Work Process window. You see the Print Diagram window shown in Figure 45 on page 82.

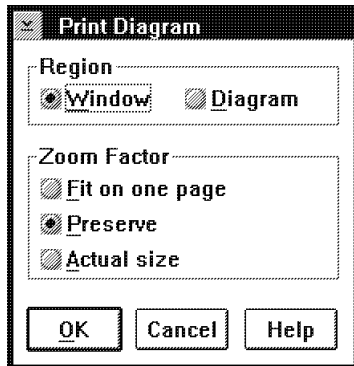


Figure 45. Print Diagram Window

2. Select the area that you want to print from the **Region** group box. You can select one of the following radio buttons:
 - Window** To print the portion of the work process diagram that is displayed in the Work Process window.
 - Diagram** To print the entire work process diagram.
3. Select one of the following radio buttons from the **Zoom Factor** group box to define the size of the printout:
 - Fit on one page**
To size the work process diagram to print on a single page.
 - Preserve**
To print the work process diagram at its current size, regardless of whether you have zoomed the diagram in or out. The size of the printed diagram matches the size of the displayed diagram.
 - Actual**
To print the work process diagram at its actual size, regardless of its size in the Work Process window.
4. Click on one of the following push buttons:
 - OK** To print the work process diagram with the selected options and close the Print window.
 - Cancel** To close the Print window without printing the work process diagram.

Context-sensitive help is always available. Press F1 or click on the **Help** push button to display online help.

Changing the Size of the Drawing Surface

You can change the size of the drawing surface if you have a large work process diagram that does not fit easily on the defined drawing surface. When you increase the

size of the drawing surface, the percentage of the drawing surface that is visible on your screen decreases.

You can use the horizontal and vertical scroll bars to adjust the portion of the drawing surface that is displayed on your screen. You can also use the Overview window to adjust the drawing surface. For more information on using the Overview window, see “Changing the View” on page 85.

To change the size of the drawing surface:

1. Select **Paper size** from the **Settings** pull-down. You see the Define Paper Size window shown in Figure 46.

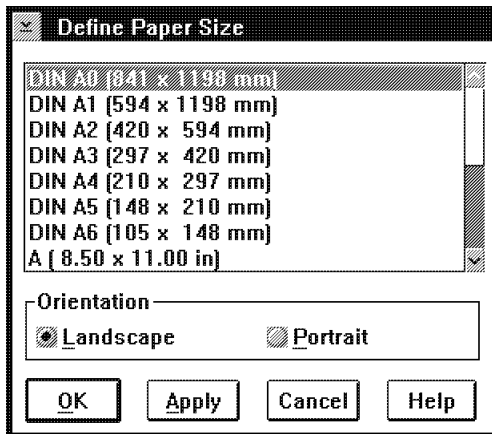


Figure 46. Define Paper Size Window

2. Select one of the predefined sizes from the list box. The default value is the first drawing surface size in the list.
3. Select either the **Portrait** or the **Landscape** radio button from the **Orientation** group box. If you select the **Portrait** radio button, the available drawing surface is longer than it is wide. If you select the **Landscape** radio button, the available drawing surface is wider than it is long. Note that the choices in the **Orientation** group box do not control the orientation of the paper in your default printer.
4. Click on one of the following push buttons:
 - OK** To change the size and orientation of the drawing surface and close the Define Paper Size window. The **OK** push button is unavailable if the current work process diagram does not fit on the drawing surface you selected. Select a bigger drawing surface or a different orientation, or make the diagram more compact. For more information on changing the size of the work process diagram before you print, see “Printing a Work Process Diagram” on page 80.

- Apply** To store the drawing surface size you specified in your user profile. These values are used as the default size for this diagram and for each new diagram you create.
- A confirmation message box is displayed. Click on the **OK** push button to confirm the change to your user profile.
- Cancel** To cancel the Define Paper Size window without changing the drawing surface size.

Context-sensitive help is always available. Press F1 or click on the **Help** push button to display online help.

Using the Overview Window

As shown in Figure 47, the Overview window shows the entire diagram that you are creating or updating. This can be useful if you zoom the work process diagram so that only a portion is visible on the drawing surface. You can also use the Overview window to change the portion of the work process diagram that is displayed in the Work Process window.

To open the Overview window, select **Overview** from the **Options** pull-down.

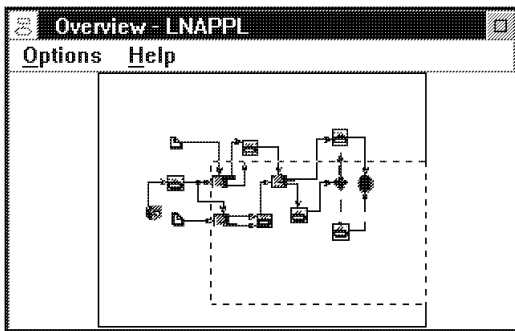


Figure 47. Overview Window

To close the window, select **Overview** again.

Refreshing the Overview Window

You can set the frequency with which Work Management Builder refreshes the Overview window. The more frequently you refresh the Overview window, the more current the display. However, you might find that Work Management Builder performance slows with frequent refreshing.

To set the refresh frequency:

1. Select **Auto refresh** from the **Options** pull-down in the Overview window. You see the Define Overview Refresh Rate window shown in Figure 48 on page 85.

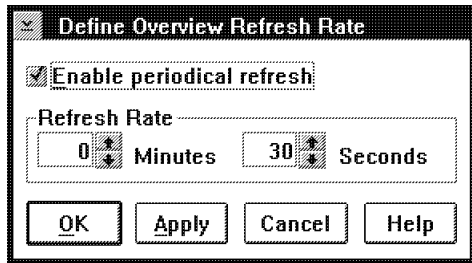


Figure 48. Define Overview Refresh Rate Window

2. Check the **Enable periodical refresh** check box to activate automatic refreshing of the Overview window. If you leave the check box blank, the Overview window is refreshed only when you make it the active window or you change the size of the drawing surface.
3. Use the **Minutes** and **Seconds** spin buttons to select the time interval for the automatic refresh.
4. Click on one of the following push buttons:

OK	To accept the refresh rate change for the current diagram and close the Define Overview Refresh Rate window.
Apply	To store the refresh rate information in your user profile and keep the window open.
Cancel	To cancel the Define Overview Refresh Rate window without changing the refresh rate.

Context-sensitive help is always available. Press F1 or click on the **Help** push button to display online help.

Changing the View

You can manipulate the portion of your diagram that appears in the Work Process window by adjusting the *viewing frame*, which is the dotted rectangle in the middle of the Overview window. You can move the rectangle, which is the equivalent of scrolling the window, or you can adjust the size of the rectangle, which zooms the window in and out. Use mouse button 2 to move or adjust the viewing frame.

To display only the part of the drawing surface that contains the work process diagram in the Overview window, select **Used area** from the **Options** pull-down. Select it again to display the entire drawing surface.

Closing the Overview Window

To close the Overview window, select **Exit overview** from the **Options** pull-down. You can also close the Overview window by selecting **Overview** from the **Options** pull-down in the Work Process window.

Using the Clipboard View Window

The *clipboard* is an area that temporarily holds information. Nodes and connectors that you select before you select **Cut** or **Copy** from the **Edit** pull-down in the Work Process window are stored in the clipboard. These nodes or connectors stay in the clipboard until they are overwritten.

To display the contents of the clipboard, select **Clipboard view** from the **Options** pull-down. You see the Clipboard View window shown in Figure 49.

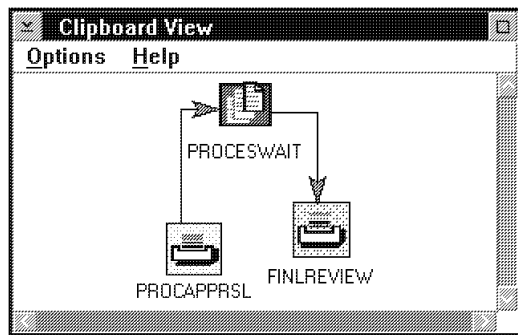


Figure 49. Clipboard View Window

From the **Options** pull-down in the Clipboard View window, you can select one of the following:

Fit into window

To scale the nodes and connectors in the Clipboard View window so that they all fit into one window.

Actual To display the nodes and connectors in the Clipboard View window in their originally defined size.

Exit To close the Clipboard View window.

Zooming In and Out

You can change the portion of your diagram that appears in the Work Process window by selecting one of the following from the **View** pull-down:

Zoom in To enlarge the display size of the diagram.

Zoom out To reduce the display size of the diagram. You can then display more nodes in the Work Process window.

Zoom reset To restore the diagram to its original display size.

Note that zooming in and out affects the appearance of the text associated with each node and some connectors. Zooming out can cause the text to be difficult to read.

Displaying a Grid

You can display the drawing surface with or without a grid, measured in inches or millimeters. You can use this grid to line up the nodes and connectors in the work process diagram. To display a grid on the drawing surface:

1. Select **Grid** from the **Settings** pull-down. You see the Define Grid window shown in Figure 50.

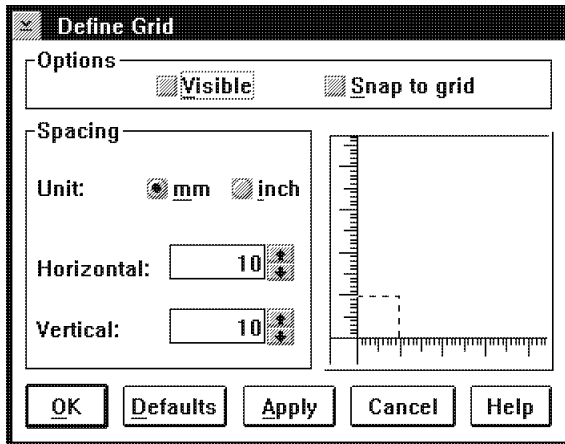


Figure 50. Define Grid Window

2. Select the **Visible** check box from the **Options** group box to display a grid on the drawing surface. Select the **Snap to grid** check box if you want to center the nodes only on the grid intersections. You can select one or both of these check boxes.
3. Select either the **mm** (millimeter) or the **inch** radio button from the **Spacing** group box to define the measurements of each cell in the grid.
4. Use the **Vertical** and **Horizontal** spin buttons to define the cell measurements, or type the measurements. You can select from 5 to 50 millimeters, or from 0.2 to 2 inches. The cell in the window to the right of this field changes dynamically to reflect your choices. You can also use mouse button 2 in this window to change the size of the cell.
5. Click on one of the following push buttons:
 - OK** To save the cell measurements you specified and close the Define Grid window.
 - Defaults** To reset the cell measurements to their default values.
 - Apply** To store the cell measurements you specified in your user profile. These values are used as the default cell measurements for this diagram and for each new diagram you create. A confirmation message box is displayed. Click on the **OK** push button to confirm the change to your user profile.

Cancel To cancel the Define Grid window without changing the cell measurements.

Context-sensitive help is always available. Press F1 or click on the **Help** push button to display online help.

Appendix A. Using the Work Management Builder Tutorial

The Work Management Builder tutorial is designed to teach you about Work Management Builder functions and then let you practice performing the functions. You can use the tutorial independently of Work Management Builder and Workfolder Application Facility. The tutorial explains how to check data in and out of Workfolder Application Facility, but no real communications link is established.

The tutorial has the following features:

- You can interact with Work Management Builder, including sizing, positioning, and controlling the program windows. At the same time, you can view tutorial instructions in separate windows.
- You can use windows and hypertext links to move through the tutorial steps. A *hypertext link* is an online connection between one piece of information and another. Hypertext links are highlighted in the text.

Using the Tutorial Lessons

The tutorial contains the following starter lessons:

- Lesson 1 introduces the concepts that help you understand work process management. The lesson describes the steps that can help you identify and outline the processing that occurs in your business.
- Lesson 2 describes how to check action lists, workbaskets, and work processes in and out of the Workfolder Application Facility host system. No real information is checked in and out.
- Lesson 3 shows you how to open the Action List window and use the information in the window to create and save a new action list, and modify an existing action list.
- Lesson 4 shows you how to open the Workbasket window and use the information in the window to create and save a workbasket.

In addition, the tutorial contains the following advanced lessons:

- Lesson 5 shows you how to create a work process diagram that contains a begin node, a work node, and a connector. You learn how to work with the nodes and connector in the Tool Palette, and how to provide information about the nodes you create.
- Lesson 6 shows you how to add a document node and a collection point node to your work process diagram. You learn how to define a collection point connector.
- Lesson 7 shows you how to expand your work process diagram by adding nodes and connectors. You improve your ability to work with a diagram that contains an increasing number of nodes and connectors. You also learn how to save the work process diagram.

- Lesson 8 shows you how to complete and verify the work process diagram. You also learn how to define a decision point, and how to size a node to emphasize its location in your diagram.

Starting the Work Management Builder Tutorial

If the Work Management Builder tutorial is not installed on your workstation, see Chapter 2, "Installing Work Management Builder" on page 7, for complete instructions on installing. To start the tutorial:

1. Double-click on the Work Management Builder Folder icon on the OS/2 desktop. You see the IBM Work Management window shown in Figure 51.

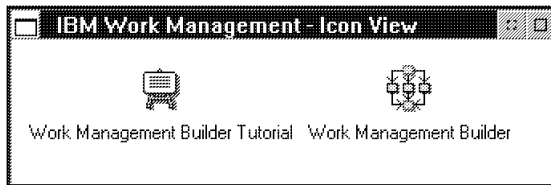


Figure 51. IBM Work Management Window

The IBM Work Management window contains the Work Management Builder icon and the Work Management Builder Tutorial icon, if it is installed.

2. Double-click on the Work Management Builder Tutorial icon. You see the Work Management Tutorial window shown in Figure 52 on page 91.

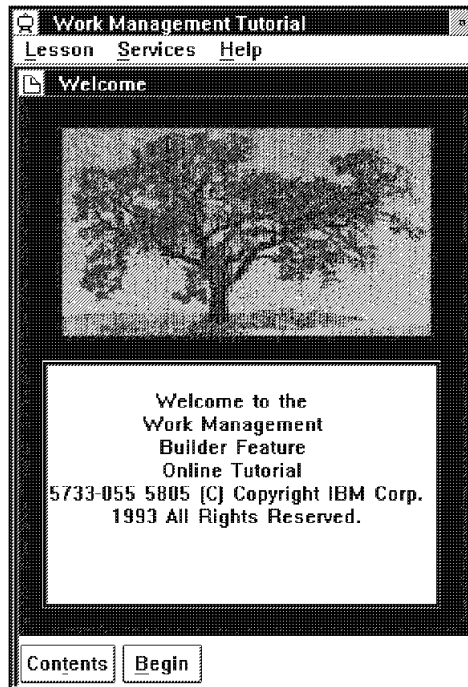


Figure 52. Work Management Tutorial Window

3. Click on the **Begin** push button to start the Work Management Builder tutorial.

Interacting with Work Management Builder

Because the tutorial is not a simulation, you can experience the true look and feel of Work Management Builder. The tutorial displays two windows on your screen. The tutorial window on the left side of the screen presents lesson information. The right side of the window is your working area, where you perform Work Management Builder functions by following the tutorial instructions. See Figure 53 on page 92.

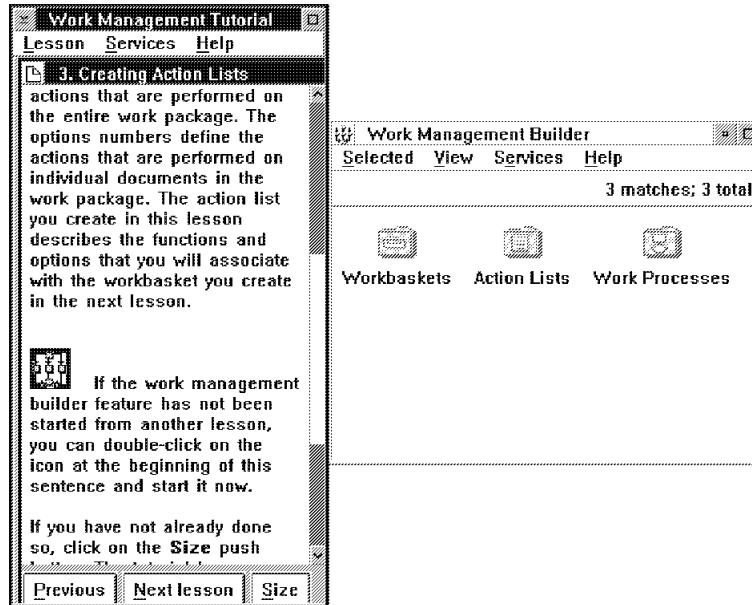


Figure 53. Using the Tutorial Window

You can use the pull-down selections to display a list of tutorial windows, search for a specific word, print or copy a tutorial lesson, display a list of lessons you have viewed, begin the OS/2 online tutorial, and get online help. To display additional information about using the tutorial, select **Using the tutorial** from the **Help** pull-down.

In addition, context-sensitive online help is always available for all pull-down choices and push buttons. To display online help, move the cursor to the choice you want help for, then press F1. Press Esc to close the help window.

Some tutorial windows have a **Size** push button. Click on the **Size** push button to toggle the window display between horizontal and vertical viewing modes.

When you have finished the tutorial, you can reset the Work Management Builder database used by the tutorial. Any object that you create is deleted, and any object that you modify is restored to its original state. You can then use the tutorial again.

Before you reset the database used by the tutorial, first make sure that the tutorial is not running on your workstation. Then type **ehlrsdb** at the OS/2 prompt and press Enter.

Using Windows and Hypertext Links

The tutorial uses multiple window and hypertext links for presenting and structuring tutorial information. The highest level of information in a Work Management Builder

tutorial is a set of lessons, which groups related lessons with an overview and review. See Figure 54 on page 93.

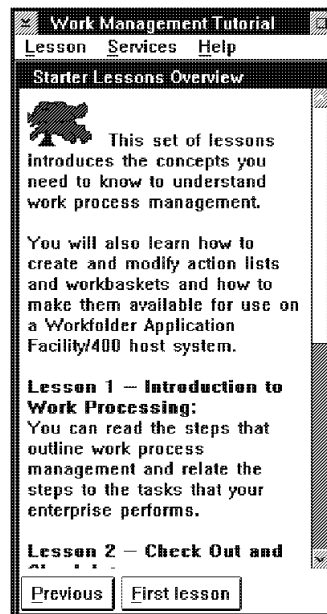


Figure 54. Starter Lessons Overview Window

The lessons are related by topic (for example, creating a workbasket).

The tutorial format clearly separates different types of lesson information, but at the same time shows how they fit together. Each lesson contains an overview and multiple steps for performing the tasks of the lesson. The steps are further broken down into individual actions. Instructions and notes are associated with each action that describe the meaning or results of the action.

A hierarchical relationship exists between lessons and steps (lessons contain steps), and a sequential relationship exists between steps (one step follows another). In addition, each lesson has a concept associated with it. This concept parallels the information in the lesson. The result is a combination of three types of tutorial windows: lesson windows, step windows, and concepts windows.

Lesson Windows

Lessons windows include a short overview that describes the purpose and subject matter of the lesson. See Figure 55 on page 94.

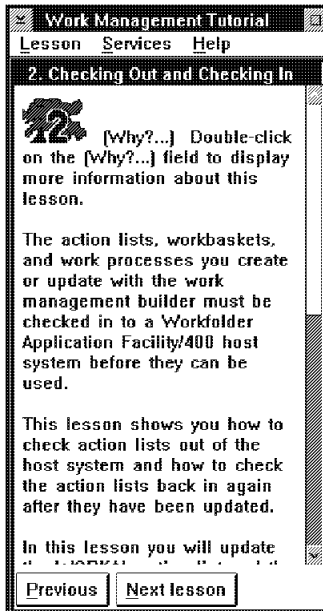


Figure 55. Sample Lesson Window

At the beginning of each overview is a **(Why?..)** hypertext link that leads to an explanation of the significance of that lesson. Hypertext links within this introductory paragraph lead to a concepts window. Double-click on a hypertext link to display the information associated with that link. Press Esc to return to the lesson window.

Lesson windows also include a numbered list of steps that you can follow to complete the task of the lesson. Each step is a hypertext link to a step window.

The lesson window has **Previous** and **Next lesson** push buttons. Click on the **Previous** push button to display the previous lesson. If you are on the first lesson, the **Previous** push button displays the set overview. Click on the **Next lesson** push button to display the next lesson in the set. If you are on the last lesson, you can click on the **Review lessons** push button to display a review of the set.

Step Windows

The step window contains detailed information for each step. See Figure 56 on page 95.

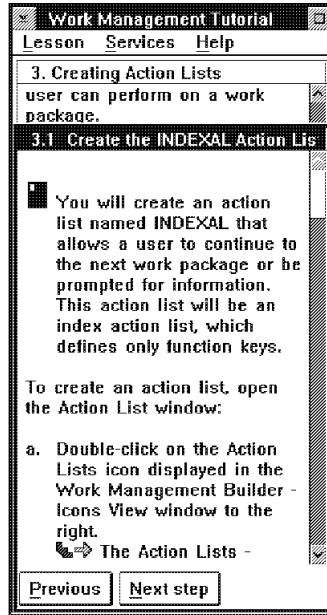


Figure 56. Sample Step Window

The lesson window remains partly visible behind the step, which helps you to maintain context. When you complete the steps, you return to the lesson window. You can review the list of steps.

Each step window contains a list of actions for you to perform.



A *step arrow symbol* marks descriptions of action results.



A *note symbol* marks notes about performing actions, including relevant syntax or other conventions.

The step window has **Previous** and **Next step** push buttons. Click on the **Previous** push button to display the previous step. If you are on the first step, the **Previous** push button displays the lesson overview. Click on the **Next step** push button to display the next step. If you are on the last step, you can click on the **Review lesson** push button to display the lesson overview.

Concepts Windows

The concepts window is displayed when you double-click on a hypertext link in a lesson window or step window. See Figure 57 on page 96.

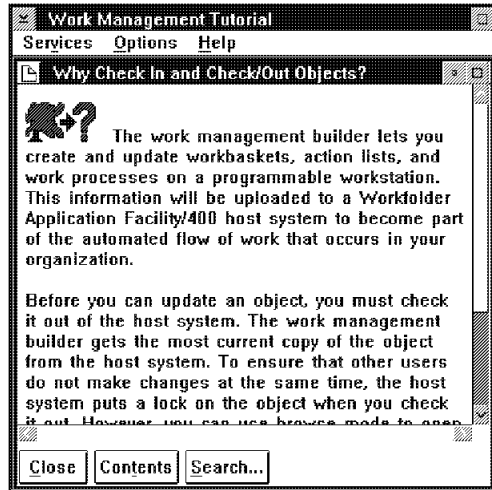


Figure 57. Sample Concepts Window

The concepts window is displayed on the right side of the Work Management Builder Tutorial window, allowing you to maintain the context of the lesson from which you selected a concept.

Special terminology is also highlighted in the concepts window, so you can explore related concepts. Double-click on the highlighted word or phrase to display the related information. Then press Esc to return to the previous window.

Online help for the tutorial is also displayed in the concepts window. Press F1 to display online help.

The concepts window has **Close**, **Contents**, and **Search** push buttons. Click on the **Close** push button to close the concepts window and return to the Work Management Builder Tutorial window. Click on the **Contents** push button to display the contents of the concepts window in an alphabetical list. You can then choose a concept from the list. Click on the **Search** push button to search for certain words.

Closing the Tutorial

To close the tutorial, select **Close** from the title bar pull-down in the Work Management Tutorial window. The title bar icon is located in the upper left corner of the Work Management Tutorial window. All open tutorial windows are closed.

Appendix B. Defining Function Keys and Options

An action list is composed of functions and options that describe the actions that a user can perform on a work package. An action list includes only those functions and options that you want the user to be authorized to perform when the work process is run on Workfolder Application Facility.

An action list must include, however, every function or option that the user can perform. For example, if you do not select the **Display document** option, the user cannot see the individual documents in a work package.

When you create an action list, you can select different actions that are performed on the entire work package (with function keys) or on individual documents in the work package (with options).

- When you create an index action list, you select only function keys. See Table 3.
- When you create a work action list, you select both function keys and options. See Table 4 on page 98.

This function key	Lets the user
Continue key	Remove the current work package from the current workbasket and release the work package to continue on to the next step of the current process.
Exit	Return the current work package to the current workbasket. The work package remains in the current workbasket.
Reassign	Remove the current work package from the current workbasket and assign the work package to a user-specified workbasket.
Cancel	Return the current work package to the current workbasket without sending the current work package on in the work process.
Delete	Delete the selected document from the current work process.
User-defined	Send information about the current work package to a user exit from which custom code can be run.
Prompt	Display a list of values for the input field, from which the user can select a value to fill in the input field.
Skip	Return the current work package to the current workbasket and move on to the next work package without sending the first work package on in the work process. Useful when a user is working with work packages in the order that the system displays work to the user. Lets the user bypass the current work package and move on to the next work package.
Retrieve	Fill in the values in the input fields with values that the user entered on the previous display of the same panel.

Table 4 (Page 1 of 2). Available Choices for Defining a Work Action List

This function key	Lets the user
Move document	Move the selected document into either a user-specified case or a file cabinet.
Copy document	Copy the selected document into either a user-specified case or a file cabinet.
Delete document	Delete the selected document from the current work package.
Display document	Display the selected document on the image monitor.
Print document	Create a print request for the selected document.
Reindex to queue	Move the selected document to the reindex queue.
Document details	Display information about the selected document, such as file cabinet keywords and document creation date. Available only for file cabinet documents.
Change document	Change selected information about the document, such as the current file cabinet keywords and document type (for file cabinet documents) and the current document type (for case documents).
Fax document	Create a fax request for the selected document.
Retrieve document	Create a request to retrieve the selected document from secondary storage.
View locations	Display a list of all of the cases and file cabinets in which the selected document exists.
Work with versions	List all versions of the selected document.
Edit document	Display the selected document on the image monitor for editing.
Reindex to workbasket	Move the selected coument to an indexing workbasket that the user specifies.
Export document	Create an export request for the selected document.
User-defined option	Send information about the selected document and the current work package to a user exit from which custom code can be run.
Continue	Remove the current work package from the current workbasket and release the work package to continue on to the next step of the current process.
Exit	Return the current work package to the current workbasket. The work package remains in the current workbasket.
Display folder	Display all documents in the current folder work package on the image monitor.
Refresh	Clear the current panel of any user input.
Print folder	Create a print request for each document in the folder work package.

<i>Table 4 (Page 2 of 2). Available Choices for Defining a Work Action List</i>	
This function key	Lets the user
Reassign	Remove the current work package from the current workbasket and assign the work package to a user-specified workbasket.
Search work	Access either case or file cabinet functions without leaving the current work package.
Begin process	Create a new work package that contains the same information as the current work package, and to reassign the new work package to a user-specified process.
Comments	Create, change, and delete comments for cases.
Cancel	Return the current work package to the current workbasket without sending the current work package on in the work process.
Release	Release a pended work package according to reasons that the user specifies.
Pend	Pend the current work package according to reasons that the user specifies.
Close	Close the folder work package and remove it from the current process.
Add form to folder	Select one form from a list of forms to be added to the current case.
Reverse order	Reverse the displayed order of documents in a folder work package.
View history	Display the historical data that pertains to the current work package.
Export folder	Create an export request for the selected document.
Import to folder	Display panels that allow documents to be imported to the current folder work package.
Fax folder	Create a fax request for each document in the current folder work package.
User-defined	Send information about the current work package to a user exit from which custom code can be run.
Force continue	Remove the current work package from the current workbasket and continue the work package to the next predefined step of the process. If the current work package is located at a collection point, the work package is started on the exception route defined for that collection point and the collection point criteria are considered satisfied.
Skip	Return the current work package to the current workbasket and move on to the next work package without sending the first work package on in the work process. Useful when a user is working with work packages in the order that the system displays the work to the user. Lets the user bypass the current work package and move on to the next work package.
Force end	Remove the current work package from the current work process, regardless of the location of the work package within the work process.

Bibliography

The following is a bibliography of related IBM publications that you might find helpful while using this book. See "Where to Find More Information" on page v for information about the VisualInfo for AS/400 product library.

You can request copies of IBM publications from your IBM representative or the IBM branch office serving your area.

IBM AS/400 Publications

Communications and Connectivity

- *IBM AS/400 Communications: Advanced Peer-to-Peer Configuration Guide*, GG24-4023
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- *IBM 3995 AS/400 Optical Library Dataserver: Operator's Guide Models A43, 143, 142, 043, and 042*, GA32-0140
- *IBM 3995 Optical Library Dataserver Products: Introduction and Planning Guide for C-Series Models*, GA32-0350
- *IBM 3995 Optical Library Dataserver Products: Model A23 Guide to Operations*, GA32-0291
- *IBM 3995 Optical Library Dataserver Products: Operator's Guide for C-Series Models*, GA32-0352
- *IBM 3995 Optical Library Dataserver Products: User's Guide for Models 123, 122, 121, 113, 112, 111, 023, 022, 021*, GA32-0141

Both Direct- and LAN-Attached

- *IBM 3995 Optical Library Dataserver Products: Introduction and Planning Guide*, GA32-0121
- *IBM 3995 Optical Library Dataserver Products: Optical Disk Format*, GA32-0224
- *IBM 3995 Optical Library Dataserver Products: Optical Disk Cartridge Requirements 130 mm Write-Once 1024 Bytes/Sector*, GA32-0146
- *IBM 3995 Optical Library Dataserver Products: Reference for C-Series Models*, GA32-0351
- *IBM 3995 Optical Library Dataserver Products: Safety*, GA32-0148

Glossary

This glossary defines terms and abbreviations used in this book and the product document library. Refer to the *IBM Dictionary of Computing*, ZC20-1699-09, for terms or abbreviations that do not appear here.

The following cross-references are used in this glossary:

- **Contrast with.** This refers to a term that has an opposed or substantively different meaning.
- **See.** This refers the reader to multiple-word terms in which this term appears.
- **See also.** This refers the reader to terms that have a related, but not synonymous, meaning.
- **Synonym for.** This indicates that the term has the same meaning as a preferred term, which is defined in the glossary.

A

access list. A list consisting of one or more individual user IDs or user groups and the *privilege set* associated with each user ID or user group. You use access lists to control user access to items in VisualInfo for AS/400. The items that can be associated with access lists are the data objects stored by users, *index classes* and subsets, *workbaskets*, and *workflows*.

action list. In Workfolder Application Facility work management, an approved list of the actions, defined by a supervisor, that a user can perform on work packages. An action list defines options, such as printing or displaying work packages, and the function keys that are available for use.

active case. A case that was entered and indexed, assigned to a queue, and has been previously pended, unqueued, assigned to a process, or assigned to a workbasket. A case with this status can be accessed through the Work any case, Work queued case, or Review any case menu options.

address ID profile. A control file used in Workfolder Application Facility that contains names and addresses.

ad hoc route. A route that is not part of a defined Workfolder Application Facility work management process. An *ad hoc route* is started when a user creates

a work package and assigns it directly to a workbasket. The user manually routes the work package from one workbasket to another by reassigning it.

administrator. The person responsible for system management, controls, and security, as well as case statistics. Synonymous with system administrator.

Advanced Peer-to-Peer Networking (APPN). Data communications support that routes data in a network between two or more APPC systems that are not directly attached.

advanced program-to-program communications (APPC). Data communications support that allows programs on an AS/400 system to communicate with programs on other systems having compatible communications support. This communications support is the AS/400 method of using the SNA LU session type 6.2 protocol.

annotation. An added descriptive comment or explanatory note.

APAR. Authorized Program Analysis Report.

API. Application programming interface.

application programmer. A programmer who designs programming systems and other applications for a user's system.

application program interface (API). The formally-defined programming language interface which is between an IBM system control program or a licensed program and the user of the program.

APPC. Advanced program-to-program communications.

APPN. Advanced Peer-to-Peer Networking.

application program interface (API). The formally-defined programming language interface which is between an IBM system control program or a licensed program and the user of the program.

archiving. The storage of backup files and any associated journals, usually for a given period of time.

AS/400. Application System/400.

AS/400 object directory profile. A control file used in Workfolder Application Facility to identify AS/400 object directories used for image document storage.

attribute. Used in VisualInfo for AS/400 APIs, a single value associated with an item (document or folder). Each index class can have up to eight attributes.

automatic importing. The process that operates in the background to complete the importing of documents when it is requested through the facsimile process or the "set up automatic import only" option.

automatic indexing. The indexing process that operates in the background to complete the indexing of documents introduced to the system through the scan and batch index function.

B

binary large object (BLOB). A large stream of binary data treated as a single object.

C

capture. In optical character recognition, to gather picture data from a field on an input document, using a special scan.

cartridge. (1) A storage device that consists of magnetic tape, on supply and takeup reels, in a protective housing. (2) For optical storage, a plastic case that contains and protects optical disks, permitting insertion into an optical drive. See also *optical disk* and *cartridge storage slots*.

cartridge storage slots. An area in an optical library where cartridges are stored.

case. A uniquely identifiable work item initiated by a user. Cases may be: Active (open and being worked), Pended (suspended awaiting further information), Closed (processing is complete), New, or Not Queued.

case file. A file that contains one entry for each case.

case history file. A file that contains the history of actions against each case.

case ID. A system-assigned identifier that is chronological, based on the time that indexing occurred. Every case has a unique case ID.

client application. An application written with the VisualInfo for AS/400 APIs to customize a user interface.

closed case. A case that was closed and cannot be reopened. A closed case is not assigned to a queue. A case with this status can be accessed through the Review any case menu option.

closing a case. Ending a case permanently. Documents in a closed case may be archived for future access.

collection. (1) In VisualInfo for AS/400, a group of objects with a similar set of storage management rules and contained within a *storage group*. Every object is stored in a collection. (2) In Workfolder Application Facility, it provides categories for entered documents and is used to match incoming documents with outstanding requests. Primarily used in case processing, collections can also be used when indexing documents into file cabinets.

collection point. In Workfolder Application Facility work management, the point where work packages wait for specific events to either occur or become synchronized before processing can continue. A collection point is part of a work process. For example, a collection point is where work packages that are part of the "open a new account" work process must wait until credit information is verified. See also *decision point*.

collection profile. A file that contains one entry for each type of document to be processed.

content class. A number that indicates the data format of an object, such as MO:DCA, TIFF, or ASCII.

control files. Files that govern the categories of work performed by an operator and the types of documents the system recognizes.

convenience workstation. A display workstation equipped with a printer and a scanner.

cross-system importing. The process that imports cases and documents to one Workfolder Application Facility system from another.

cross-system exporting. The process that exports cases and documents from one Workfolder Application Facility system to another.

current document. A document that is being processed.

customization. The process of designing a data processing installation or network to meet the requirements of particular users.

D

DASD. Direct access storage device.

DASD system ID profile. A file used to define the roles of AS/400 processors in the Workfolder Application Facility system.

DDM. Distributed data management.

DBCS. Double-byte character set.

decision point. In Workfolder Application Facility work management, the point where work packages continue on their current route or switch to an alternate route, depending on the specific information in each work package. Decision points are tables consisting of variable names, values, and routes. A decision point is part of a work process. For example, a decision point is where work packages that are part of the "open a new account" work process receive approval or not based on credit information.

See also *collection point*.

destager. A function of the object server that moves objects from the *staging area* to the first step in the object's *migration policy* or *management class*.

direct access storage device (DASD). A device in which access time is effectively independent of the location of the data.

distributed data management (DDM). A feature of the System Support Program that lets an application program work on files that reside in a remote system.

display workstation. An image processing workstation used primarily for displaying documents that have been previously scanned or imported into the AS/400 system.

document. (1) An item containing one or more base parts. See also *collection point*. (2) Information and the medium on which it is recorded that generally have permanence and that humans or machines can read. (3) A named, structural unit of text that can be stored, retrieved, and exchanged among systems and users as a separate unit. Also referred to as an *object*. A single document can contain many different types of base parts, including text, images, and objects such as spreadsheet files.

document content architecture (DCA). An architecture that guarantees information integrity for a document being interchanged in an office system network. DCA provides the rule for specifying form and meaning of a document. It defines revisable form text (changeable) and final form text (unchangeable).

document type. Provides categories for entered documents and are used to match incoming documents with outstanding requests. Primarily used in case processing, document types can also be used when indexing documents into file cabinets.

document type profile. A file that contains one entry for each type of document to be processed.

document working set. A set of document images selected from a menu that Workfolder Application Facility provides. This set of document images is sent to the ImagePlus workstation for display.

double-byte character set (DBCS). A set of characters in which each character occupies two bytes. Languages, such as Japanese, Chinese, and Korean, that contain more symbols than can be represented by 256 code points, require double-byte character sets. Entering, displaying, and printing DBCS characters requires special hardware and software support.

E

empty case. A case that has no documents.

export. In Workfolder Application Facility, a process used to write data from a document in a system folder to a file. Export and import processes can be used to transfer documents among Workfolder Application Facility systems.

F

facsimile configuration profile. A control file that lets the system administrator associate Facsimile Support for OS/400 with Workfolder Application Facility.

fax exporting. A process that operates in the background to send documents requested for fax transmission to a fax server.

fax importing. The importing process that operates in the background to forward fax documents received by the fax server.

FIFO (first in, first out). A queueing technique in which the next item to be retrieved is the item that has been in the queue for the longest time.

file cabinet. A component of Workfolder Application Facility that provides document storage and retrieval capabilities designed to help manage selected documents.

file cabinet code. Acts as the file cabinet name.

first in first out (FIFO). A queueing technique in which the next item to be retrieved is the item that has been in the queue for the longest time.

focus control. In Workfolder Application Facility, a feature that lets the system administrator decide whether Workfolder Application Facility and ImagePlus Workstation Program or the user controls the active window.

folder. (1) In VisuallInfo for AS/400, an object that can contain other folders or documents. (2) In Workfolder Application Facility, the area in the AS/400 system where images are stored after successful scanning or importing.

folder balancing. In the AS/400, the process by which documents are distributed evenly among the available folders in the system.

folder manager. In VisuallInfo systems other than VisuallInfo for AS/400, the term used to describe the data model and a subset of the APIs. In VisuallInfo for AS/400, this term refers to the entire set of VisuallInfo for AS/400 APIs.

folder name. A 1- to 12-character user-defined word that names a folder. One period (.) is allowed. If the folder name is more than 8 characters, the ninth character must be a period. This can be followed by a 1- to 3-character extension.

folder path. A folder name, followed by one or more additional folder names, where each preceding folder is found. Each folder in the path must be separated by a slash (/). A folder path can consist of 1 to 63 characters.

forms creation utility. A utility that allows the system administrator to capture a preprinted form as an image and to define the content and format of the form.

G

Group III. A compression algorithm that conforms to a standard promulgated by the International Telegraph and Telephone Consultative Committee (CCITT).

H

high-speed indexing. The indexing process that operates in the background to complete the indexing of documents that were input into the system using the high-speed scanning function.

high-speed scanner workstation. A display workstation equipped with a high-speed scanner.

HTML. Hypertext markup language.

I

image. (1) A single page of information; the result of scanning, or digitizing, a single sheet of paper. (2) An electronic representation of a picture produced by means of sensing light, sound, electron radiation, or other emanations from the picture or reflected by the picture. An image can also be generated directly by software without reference to an existing picture. See also *page image*.

image data. Rectangular arrays of raster information that define an image. Image data is often created originally by a scanning process.

image host. The system where scanned and imported documents are permanently stored. See also *optical library subsystem*.

Image Object Content Architecture (IOCA). A structured collection of constructs used to interchange and present images.

image spool file. A file that contains sorted, merged, and completed print records ready for print.

image workstation. A programmable workstation that can perform image functions.

import data file. An AS/400 database file that contains data for one or more documents. Using data in the file, Workfolder Application Facility creates documents that can be stored and indexed just like scanned documents.

importing. A process by which documents are input into AS/400 using files rather than the scanning process. Imported documents can be stored in Workfolder Application Facility on DASD and optical, and displayed and printed, in the same manner as scanned documents.

import page ID profile. A file that contains the form overlay and fields specified for each page ID defined for a document type whose data type is 01.

inbound. Pertaining to communication flowing in a direction towards the application program from external sources, such as a transmission from a terminal to the application program. Contrast with *outbound*.

index. To associate a document with a case or identifier.

index class. A category for storing and retrieving objects, consisting of a named set of attributes known as *key fields*. When you create an item in VisualInfo for AS/400, your application must assign an index class and supply the key field values required by that class. An index class identifies the automatic processing requirements and storage requirements for an object.

indexing. The three-step process consisting of viewing a document, specifying an identifier for the document, and before creating a new case, or matching the document with an existing case.

instance. In work management, an occurrence of a work package within a process. If the process consists of parallel routes, multiple instances of a work package exist.

IOCA. Image Object Content Architecture.

item. (1) Set of attributes and objects—one or more files containing image data, annotations, notes, or other content—that together represent a physical document, such as an insurance claim or a folder.

See also *document*. (2) The smallest unit of information that the library server administers. An item can be a folder, document, workbasket, or workflow. Referred to as an *object* outside of library server functions.

J

journal. A special-purpose file or data set that can be used to provide a record of operator and system actions used to recover data and to identify operator actions that resulted in a problem.

journaling. (1) The process of recording changes made in a physical file member in a journal. Journaling allows you to reconstruct a physical member by applying the changes in the journal to a saved version of the physical file member. (2) The process of recording information sequentially in a database.

K

key field. An attribute of an item that represents a type of information about that item. For example, a customer data item might have key fields for the customer's name and social security number.

keyword. A name or symbol that identifies a parameter.

keyword field. A field enabled for input that provides data for a single keyword that is defined for a file cabinet.

keyword value. The input specified in the field for each keyword.

L

LAN. Local area network.

language profile. A control file used in Workfolder Application Facility to define country-specific parameters, such as time and date formats.

last in first out (LIFO). A queueing technique in which the next item to be retrieved is the item most recently placed in the queue.

library server. The component of VisualInfo for AS/400 that contains index information for the items stored on one or more *object servers*.

LIFO (last in, first out). A queueing technique in which the next item to be retrieved is the item most recently placed in the queue.

local area network (LAN). A computer network located on a user's premises within a limited geographical area.

LU 6.2. In Systems Network Architecture (SNA), a type of session between two application programs in a distributed processing environment, using the SNA character string or a structured-field data stream; for example, an application program using CICS communication with an AS/400 application.

M

Machine-Generated Data Structure (MGDS). (1) An IBM structured data format protocol for passing OCR (Optical Character Recognition) data among various applications. When workstations use OCR facility to create coded data from scanned images, those coded data are formatted into MGDS and passed to other applications for further processing. (2) Data extracted from an image and put into generalized data stream (GDS) format.

magnetic storage. A storage device that uses the magnetic properties of certain materials.

magnetic tape. A tape with a magnetizable layer on which data can be stored.

magnetic tape device. A device for reading or writing data from or to magnetic tape.

masking. The action of obscuring part of the image of a document so that it is not visible to the viewer.

MGDS. Machine-Generated Data Structure.

Mixed Object: Document Content Architecture (MO:DCA). An IBM architecture developed to allow the interchange of object data among applications within the interchange environment and among environments.

Mixed Object: Document Content Architecture-Presentation (MO:DCA-P). A subset architecture of MO:DCA that is used as an envelope to contain documents that are sent to the ImagePlus workstation for displaying or printing.

MO:DCA. Mixed Object: Document Content Architecture.

MO:DCA-P. Mixed Object: Document Content Architecture-Presentation.

MRI. Machine-readable information.

N

national language support (NLS). The modification or conversion of a United States English product to conform to the requirements of another language or country. This can include enabling or retrofitting of a product and the translation of nomenclature, MRI, or product documents.

network. An arrangement of programs and devices connected for sending and receiving information.

network table file. A text file created during installation that contains the system-specific configuration information for each node for each VisualInfo for AS/400 server. Each server must have a network table file that identifies it. The name of the network table is always FRNOLNT.TBL.

new case. A case that was entered and indexed, assigned to a queue, and has not been previously pending, unqueued, assigned to a process, or assigned to a workbasket. A case with this status can be accessed through the Work any case, Work queued case, or Review any case menu options.

NLS. National language support.

not queued case. A case that was entered and indexed, and is not assigned to a queue. A case with this status can be accessed through the Work any case or Review any case menu options.

O

object. (1) An item upon which actions are performed. (2) A collection of data referred to by a single name. (3) The smallest unit within the system. For ImagePlus systems, this is typically a single-image document. (4) Any binary data entity stored on an object server. In the VisualInfo for AS/400 data model, *object* specifically refers to a document's contents or parts.

object authority. The right to use or control an object.

object directory. A control file used in Workfolder Application Facility to identify AS/400 object directories used for image document storage.

object server. The component of IBM ImagePlus VisualInfo for AS/400 that physically stores the objects or information that client applications store and access.

OCR. Optical character recognition.

operator. The person who handles daily system administrative tasks.

optical. Pertaining to optical storage.

optical cartridge. A storage device that consists of an optical disk in a protective housing. See also *cartridge*.

optical character recognition (OCR). Character recognition that uses optical means to identify graphic characters.

optical disk. A disk that contains digital data readable by optical techniques. Synonymous with digital optical disk.

optical drive. The mechanism used to seek, read, or write data on an optical disk. An optical drive may reside in an optical library or as a stand-alone unit.

optical drive profile. A control file used in Workfolder Application Facility to define the optical controller used for the optical storage of documents.

optical libraries. Software used to store image data on optical platters. Only direct-attached optical systems contain optical libraries.

optical library subsystem. The hardware and software that provides the long-term storage of the image data. See also *image host*.

Optical Storage Support. Software that supports communication between stand-alone optical disk drives, the optical library, and VisualInfo for AS/400 and Workfolder Application Facility. The software runs on the System/36 5363 unit serving as the optical controller.

optical system profile. A file used to define the optical controller used for the optical storage of documents.

optical systems. Hardware used to store image data on optical platters. Only direct-attach optical systems contain optical libraries.

optical volume. One side of a double-sided optical disk containing optically stored data.

OS/2. Operating System/2.

OS/400. Operating System/400.

outbound. Pertaining to a transmission from the application program to a device. Contrast with *inbound*.

output class. A unique name assigned to a specific time frame when faxes are eligible to be transmitted.

output profile. A file that defines the content of each output form.

override. A parameter or value that replaces a previous parameter or value.

P

page. A single physical medium; for example, an 8.5-inch by 11-inch piece of paper.

page image. The electronic representation of a single physical page. The bounds of a page image are determined by the electromechanical characteristics of the scanning equipment, along with the image capture application specifications in the receiving data processing system.

page scan. The electromechanical process of scanning a physical page (paper) to create a bit image of the page.

pan. Progressively translating an entire display image to give the visual impression of lateral movement of the image.

PDF. Portable document format.

pend. To suspend a case while awaiting additional information or action, such as a particular document type or date.

pending case. A case that was pending through casework, waiting for more information. A pending case is not assigned to a queue. A case with this status can be accessed through the Work any case or Review any case menu options.

pending. Awaiting further information or action on a case.

platter. See *optical disk*.

prefix. (1) A code dialed by a caller before being connected. (2) A code at the beginning of a message or record.

Presentation Text Object Content Architecture (PTOCA). An architecture developed to allow the interchange of presentation text data.

primary processor. In a group of processing units, the main processing unit and its internal storage through which all other units communicate.

printer workstation. A display workstation equipped with a printer.

priority. A rank assigned to a task that determines its precedence in receiving system resources.

privilege. An authorization for a user to either access or perform certain tasks on objects stored in VisualInfo for AS/400. The system administrator assigns privileges.

privilege set. (1) In VisualInfo for AS/400, collection of *privileges* for working with system components and functions. The system administrator assigns privilege sets to users (user IDs) and user groups. (2) In the work management system in Workfolder Application Facility, an approved list of the actions, defined by a supervisor, that a user can perform on work packages. An privilege set defines options, such as printing or displaying work packages, and the function keys that are available for use.

process item. Item used as a building block in a work process.

profile. A file that governs the categories of work performed and the types of users recognized by the system.

program temporary fix (PTF). A temporary solution or bypass of a problem diagnosed by IBM as resulting from a defect in a current unaltered release of the program.

PTF. Program temporary fix.

PTOCA. Presentation Text Object Content Architecture.

Q

queue. A line or list of items waiting to be processed; for example, cases to be worked or messages to be displayed.

queue ID profile. A file that contains one entry for each active case. Each case is indexed by queue ID, queue type, and creation date and time.

R

reindexing. The process of indexing documents that were previously indexed incorrectly. This process is the same as the indexing process.

render. To take data that is not typically image-oriented and depict or display it as an image. In VisualInfo for AS/400, you can render word-processing documents as images for display purposes.

resolution. In computer graphics, a measure of the sharpness of the image, expressed as the number of lines and columns on the display screen or the number of pels per unit of area.

rotate. A function of the document display window and the scan document display window. The orientation depends on the option selected.

route. In work management, a set of steps that move work between workbaskets, collection points, and decision points.

S

SBCS. Single-byte character set.

scan overlap. The process by which a document is scanned while a previously scanned document is stored on DASD.

scanner. A device that examines a spatial pattern one part after another and generates analog or digital signals corresponding to the pattern. (I)

scanner workstation. A display workstation equipped with a scanner.

scanning. A physical process that enters documents into an ImagePlus workstation. After a document has been scanned, it can be stored permanently.

scanning and batch indexing. An efficient scanning and indexing option that overlaps the scanning of a document with the storing of another document, while an indexing process operates automatically in the background.

search criteria. In VisualInfo for AS/400, the text string used to represent the logical search to be performed on the library server.

secondary processor. In a group of processing units, any processing unit other than the primary unit.

server. On a local area network, a data station that provides facilities to other data stations; for example, a file server, a print server, a mail server.

side by side. A function on the document display window that displays two pages of a multipage document next to each other.

single-byte character set (SBCS). A set of characters in which each character occupies one byte.

slot. (1) A position in a device used for removable storage media. (2) A space in an optical library where an optical cartridge is stored. See *optical cartridge*.

SMS. System-managed storage.

spool file. A file that holds output data waiting to be printed or input data waiting to be processed by a program. Workfolder Application Facility can convert a spool file to an import data file.

spool writer. The part of the System Support Program that prints output saved in the spool file.

staging. The process of moving a stored object from an offline or low-priority device back to an online or higher priority device, usually on demand of the system or on request of a user. When a user requests an object stored in permanent storage, a working copy is written to the *staging area*.

stand-alone. Pertaining to an operation that is independent of any other device, program, or system.

step number. In work management, the numbers that specify the order in which route commands are processed. Each step number must have an associated command telling the route what action to take.

storage. The action of placing data into a storage device.

storage class. A storage class, in combination with an optical system identifier, defines the set of optical volumes upon which documents can be stored. Documents with the same storage class and optical system ID are stored on the same optical volume.

storage method. In Workfolder Application Facility, a means of grouping documents together for storage to an optical disk. Workfolder Application Facility provides the

following storage methods: file cabinet, collection, prioritized, and system assigned (optical distribution).

storage system. A generic term for storage in VisuallInfo for AS/400.

subsystem. A secondary or subordinate system, or the programming support part of a system that is usually capable of operating independently of or asynchronously with a controlling system.

suspend a case. To end case processing temporarily.

system administrator. The person who manages the ImagePlus workstation, the Optical Library Subsystem, and the departmental processor. The system administrator helps with problem determination and resolution. Synonymous with *administrator*.

system ID profile. A control file used in Workfolder Application Facility to define the roles of AS/400 processors in the system.

system-managed storage (SMS). The VisuallInfo for AS/400 approach to storage management. The system determines object placement, and automatically manages object backup, movement, space, and security.

System Support Program (SSP). A group of IBM-licensed programs that manage the running of other programs and the operation of associated devices, such as the display station and printer. The SSP also contains utility programs that perform common tasks, such as copying information from diskette to disk.

T

tape. See *magnetic tape*.

tape cartridge. See *cartridge*.

U

user. (1) Anyone requiring the services of VisuallInfo for AS/400. This term generally refers to users of client applications rather than the developers of applications, who use the VisuallInfo for AS/400 APIs. (2) In Workfolder Application Facility, the individual who performs input and case processing.

user activity file. A file that contains one entry for each user. It contains item counts and productivity statistics.

user exit. (1) A point in an IBM-supplied program at which a user exit routine may be given control. (2) A programming service provided by an IBM software product that may be requested during the processing of an application program for the service of transferring control back to the application program upon the later occurrence of a user-specified event.

user exit routine. A routine written by a user to take control at a user exit of a program supplied by IBM.

user fields. Data fields defined within the user exit programs. The user exit programs process the data and values passed into these fields.

user ID profile. A file that contains one entry for each user. The entries contain information such as processing eligibility.

V

volume. A certain portion of data, together with its data carrier, that can be handled conveniently as a unit.

W

workbasket. In work management in Workfolder Application Facility for AS/400, a container that holds work packages. Workbaskets can be used as parts of process definitions or ad-hoc routes. In VisualInfo for AS/400, a logical location within the VisualInfo for AS/400 system to which work packages can be assigned to wait for further processing.

A workbasket definition includes the rules that govern the presentation, status, and security of its contents.

workbasket privilege set. A list that specifies which options and function keys operate on indexing and work with work package panels.

work management. A system that lets an enterprise define a work process and environment to automate workflow and control business processes.

work management case. A case that was entered and indexed, and has been assigned to either a process or a workbasket. A work management case is not assigned to a queue. A case with this status can be accessed through the Review any case, Work with workbaskets, or Search for work packages menu options.

work order. The sequence of work packages in a workbasket.

work package. The work that is routed from one location to another. A work package can consist of an unindexed document, a file cabinet document, a Workfolder Application Facility case, or a user-defined collection of objects. It can also be empty, such as when you first create it and before it contains any work items. Work packages can be routed automatically by defined processes, or users can manually route work packages in an ad-hoc manner to workbaskets they specify.

work process. In work management, the series of steps, events, and rules through which a work package flows. A work process is a combination of the route, collection point, and decision point through which a predefined type of work package must progress.

workflow. A sequence of *workbaskets* that a document or folder travels through while it is being processed.

working set. A set of pages residing in the workstation, which can constitute one or more documents.

workstation. A computer processor unit, image display unit, scanners, and printers with which the user performs input, indexing, and printing.

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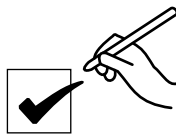
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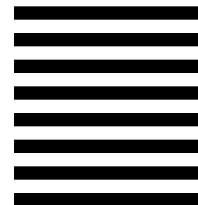
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