WebSphere. Lombardi Edition 7.2

Handleiding Process Portal

IBM.

Inhoudsopgave

Introductie

Using Process Portal in IBM Websphere Lombardi Edition, you can start and stop processes, manage and run tasks for each process, and view the performance of individuals, teams, and processes. As described in the following sections, Lombardi Process Portal enables end users to complete the tasks that result from running Lombardi processes on the Process Center Server or a Process Server in a runtime environment.

To get started with Lombardi Process Portal, see Starting Lombardi Process Portal.

Productcomponenten van Lombardi

IBM WebSphere Lombardi Edition bevat de volgende componenten. In het volgende diagram ziet u hoe deze componenten in het algemeen zijn geconfigureerd.

Component	Functie
Process Center	Verzorgt een centrale ontwikkelingsomgeving en een repository voor meerdere procesauteurs die werkzaam zijn in de Process Center Console en andere interfaces in Lombardi Authoring Environment. Het Process Center bevat een Process Center Server en een Performance Data Warehouse. Hiermee kunt u in de Lombardi Authoring Environment procestoepassingen uitvoeren en daarnaast performancegegevens opslaan voor test- en afspeeldoeleinden tijdens het ontwikkeltraject.
Process Server	Voert de processen en services uit die zijn ingebouwd in Lombardi Authoring Environment, opgeslagen in de repository van Process Center en daarna zijn geïnstalleerd in een runtimeonmgeving.
Performance Data Warehouse	Verzamelt procesgegevens en aggregeert ze aan de hand van de traceervereisten die zijn vastgelegd in Lombardi Authoring Environment.
Process Center-console	Hiermee kun u de Lombardi-repository beheren en onderhouden, met inbegrip van het beheer van procestoepassingen, werkgebieden en snapshots. Maakt ook de installatie van procestoepassingen mogelijk op Process Servers in runtimeomgevingen.
Authoring Environment	Lombardi Authoring Environment bestaat uit een aantal interfaces waarmee procesauteurs bedrijfprocessen kunnen modelleren, implementeren, simuleren en inspecteren.
Process Portal	Vormt een interface waarmee deelnemers van processen toegewezen taken kunnen uitvoeren, de historie van taken kunnen bekijken, en de prestaties van hun processen en teams kunnen bekijken. In de Process Portal kunnen deelnemers van het proces verbinding leggen met de Process Center Server of met een Process Server in een van de geconfigureerde runtimeomgevingen, bijvoorbeeld de test- of productieomgeving.
Process Admin Console	Vormt een interface waarmee beheerders Lombardi Process Servers kunnen beheren en onderhouden in een van de geconfigureerde runtimeomgevingen, bijvoorbeeld de test- of productieomgeving. Beheerders kunnen hier ook de Process Center Server configureren en onderhouden.
Performance Admin Console	Vormt een interface waarmee beheerders Lombardi Performance Data Warehouses kunnen beheren en onderhouden in een van de geconfigureerde runtimeomgevingen, bijvoorbeeld de test- of productieomgeving. Beheerders kunnen hier ook de Performance Data Warehouse in het Process Center Server configureren en onderhouden.

Lombardi-architectuur

In het volgende diagram ziet u een gebruikelijke configuratie van IBM® WebSphere® Lombardi Edition:
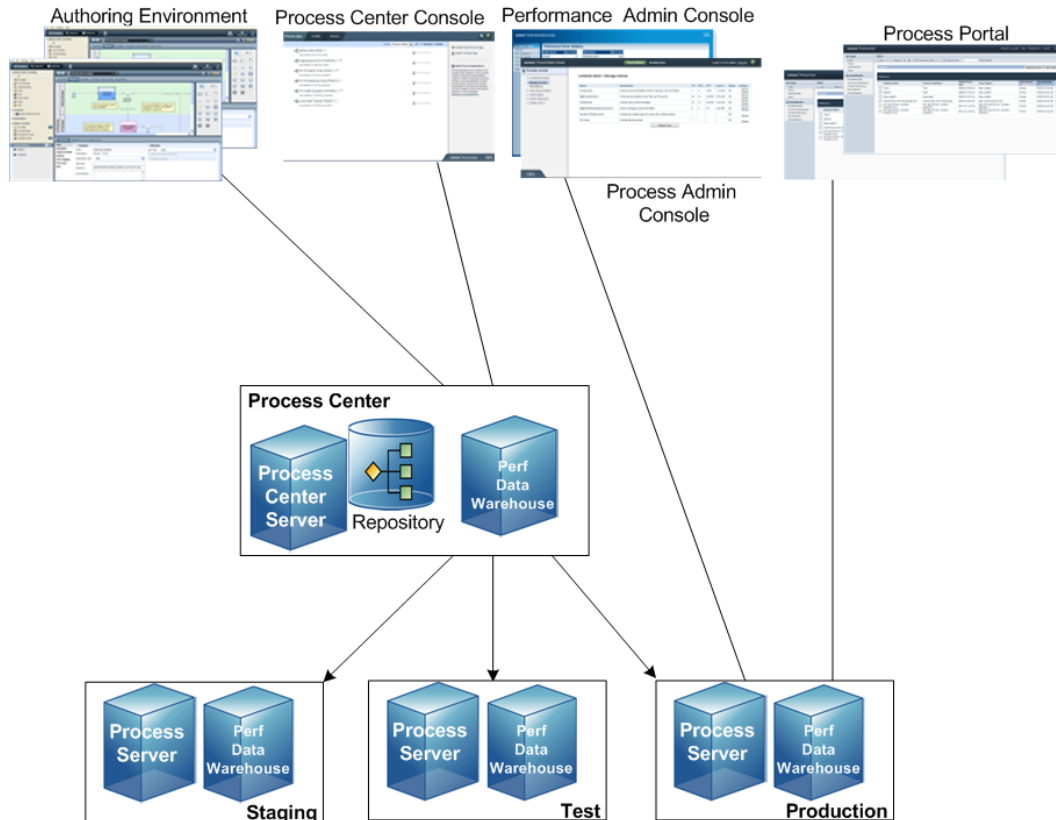
- In de Lombardi Authoring Environment kunnen meerdere gebruikers verbinding maken met het Process Center.

- In Lombardi Authoring Environment kunnen gebruikers procesmodellen maken en ondersteunende implementaties (procestoepassingen) en deze toepassingen met bijbehorende items opslaan in de repository van Process Center. Gebruikers van de Authoring Environment die verbinding hebben met het Process Center kunnen items gemeenschappelijk gebruiken.

- Het Process Center bevat een Process Center Server en het Performance Data Warehouse. Hiermee kunnen gebruikers in de Lombardi Authoring Environment hun procestoepassingen uitvoeren en performancegegevens opslaan voor test- en afspeeldoeleinden tijdens het ontwikkeltraject.

- In de Process Center Console kunnen beheerders procestoepassingen installeren die gereed zijn voor staging, testen of productie op de Process Servers in deze omgevingen.

- In de Process Center Console worden instances van procestoepassingen in alle geconfigureerde omgevingen beheerd.

- In de Process Portal voeren eindgebruikers de aan hen toegewezen taken uit. De Process Center Server en de Process Servers in geconfigureerde runtimeomgevingen kunnen de procestoepassingen uitvoeren die de toegewezen taken maken.

- In de Process Portal kunnen deelnemers van het proces verbinding leggen met de Process Center Server of met een Process Server in een van de geconfigureerde runtimeomgevingen - afhankelijk van de ontwikkeling, test of vrijgave van een proces naar een productieomgeving.

- Lombardi Performance Data Warehouse haalt met regelmatige tussenpozen de getraceerde gegevens op vanaf de Process Center-server of de processerver. Gebruikers kunnen rapporten maken en bekijken waarin deze gegevens in Lombardi Authoring Environment en Process Portal zijn verwerkt.

- Vanuit de Process Admin Console en de Performance Admin Console kunnen beheerders alle Lombardi-servers beheren en onderhouden.

Understanding the process life cycle

Some Lombardi processes are designed to be started from Lombardi Process Portal, and some are initiated by an external event. In a typical Lombardi configuration, managers can start, stop, or terminate process instances directly from Lombardi Process Portal. The following figure illustrates the life cycle of a typical Lombardi process:

Business Analysts and Developers	Design process model and implement process steps in Lombardi Authoring Environment
Administrators and Developers	Install process application snapshot on Process Server in runtime environment
Managers	Start the process and assign tasks to process participants in Lombardi Process Portal
Process Participants	Receive tasks in Process Portal Inbox and complete the tasks
Business Analysts and Managers	Monitor and analyze process performance via Process Portal scoreboards, custom reports, and analyses

For more information about the types of individuals who are normally involved in the development of a process in Lombardi, see *Planning Lombardi projects* in *Lombardi Authoring Environment User Guide*.

Starting Lombardi Process Portal

Read the following sections to learn how to get started with Process Portal for IBM Websphere Lombardi Edition.

Setting up users

You can log in to Lombardi Process Portal using the `tw_user` account as explained in *Setting up user accounts* in *Lombardi Administration Guide*.

Configuring processes

The following table describes how processes must be configured to provide access to end users in Lombardi Process Portal:

Process Portal action	Configuration requirements
Starting a process	You must be a member of a participant group that has been given **Expose to start** access to one or more business process definitions (BPDs). For more information, see *Exposing BPDs* in *Lombardi Authoring Environment User Guide*.
Running tasks	You must be a member of a participant group assigned to the activity in a BPD. Participant group members are established during process development and can be adjusted when a process is installed. For more information, see *Assigning participant groups to lanes* in *Lombardi Authoring Environment User Guide* and *Configuring runtime participant groups* in *Lombardi Administration Guide*.

Aanmelden

Start Lombardi Process Portal one of the following ways:

- Open your Web browser to the following location: `http://[host_name]:[port]/portal`, providing the name of the host on which Lombardi Process Center Server or Process Server is installed and the port designated for the server during Lombardi installation.

- If you are working on a Windows® host where Lombardi Process Center Server or Process Server is installed, choose **IBM WebSphere Lombardi Edition** > **Lombardi Process Portal** from your **Start** menu.
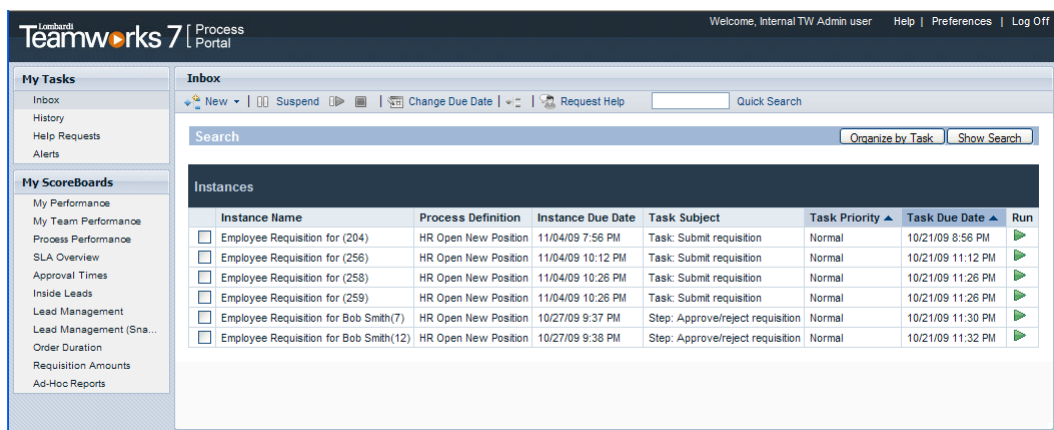
Log in using your Lombardi user name and password.

See Setting up users if you do not already have a user account.

Navigeren in beginviews

The first time you start Lombardi Process Portal, it opens to your Inbox:

The following table describes each numbered area in the preceding image of the Process Portal interface:

1	Use the links to navigate to tasks, scoreboards, and projects: • My Tasks - Receive and complete tasks that are assigned to you, as described in Running tasks. From your Inbox, you can also view task execution history, requests for help from other process participants, and process-related alerts. • My ScoreBoards - Monitor individual and team process performance, view custom reports, and create ad-hoc reports, as described in Working with reports. • My Projects - Access custom Process Portal pages as described in Creating custom Process Portal pages.
2	This area displays the name of the current Process Portal user. Click Preferences to specify your e-mail and language settings. Click Help to open the online user assistance for Process Portal.
3	Use the toolbar icons to manage process instances and tasks. For example, you can start, suspend, resume, or terminate currently active process instances, assign tasks to users or groups, change the due date of a process instance or a task, and search for process instances and tasks. Voor meer informatie raadpleegt u Starting and managing processes en Taken beheren.
4	This is the main area that displays the items you are currently working with. For example, the preceding image shows the tasks in the current user's Inbox. The tasks are displayed according to the process instance that generated each task. You can click an Instance Name or Task Subject to see more detailed information about each task. In this area, you can also view and sort search results, view reports and scoreboards, and edit preferences.

To learn more about tasks that users can perform in Lombardi Process Portal, see Process Portal tasks.

Process Portal tasks

The following table lists the types of tasks that you can perform in Process Portal for IBM Websphere Lombardi Edition and provides links to topics that provide detailed instructions.

Taak	Zie...
Start processes and monitor the progress of each process instance to ensure that it is completed on time.	Starting and managing processes
Allocate tasks among process participants and adjust the due date or priority of each task as needed.	Taken beheren
Complete assigned tasks by filling out a form or collaborating with other process participants.	Running tasks
Attach documents to a task or read documents attached by other process participants. Documents enable you to provide important information about the tasks you are completing.	Working with documents
Analyze individual and team performance for each process instance.	Working with reports
Create and share custom business data searches for both active and inactive process instances and tasks.	Performing effective searches
Edit system settings, audit process data, and customize the look and feel of Lombardi Process Portal.	Customizing and maintaining Lombardi Process Portal

Starting and managing processes

Read the following sections to learn how you can use Process Portal for IBM Websphere Lombardi Edition to start, stop, monitor, and control processes.

Voordat u een van de volgende taken uitvoert:

- You need to be a member of a participant group assigned to the activities in a business process definition (BPD) as described in Configuring processes.

- You must have permission to use process management functions in Lombardi Process Portal as described in Restricting access to Process Portal functions.

- Log in to Lombardi Process Portal as explained in Starting Lombardi Process Portal.

See the following topics to learn more about starting and managing process instances:

Voor meer informatie...	Zie...
Start, suspend, resume, or terminate process instances.	Starting and stopping processes
Change the due date of a process instance.	Changing the due date of a process instance
Add a process instance to your Microsoft® Outlook calendar so that the process instance becomes an appointment in your Outlook calendar.	Een procesinstance toevoegen aan een Outlook-agenda
View the process diagram to see information about the current process instance.	Viewing process progress
Manage and edit exposed process values (EPVs) to affect the process task flow and assignments.	EPV's beheren (exposed process values)

Starting and stopping processes

Read the following sections to learn how to start, suspend, resume, or terminate process instances in Lombardi Process Portal:

- Starting a new process

- Viewing and managing process instances from the Inbox

- Viewing and managing process instances from the instance details page

- Suspending a process instance

- Resuming a suspended process instance

- Terminating a process instance

- Starting ad-hoc processes

Starting a new process

Starting a process generates an instance of the process in which process participants can perform all the tasks that must be completed to achieve the goal of the process. You can run different processes at the same time, and you can run multiple concurrent instances of the same process.

Before performing the following procedure, the business process definitions (BPDs) of processes that you want to start from Lombardi Process Portal must be exposed to you as described in Configuring processes.

1. On the toolbar, click the **New** icon as shown in the following image.

2. From the drop-down list of processes, select the name of the process that you want to start.

   In the following example, the current user is starting a process named **HR Open New Position**.
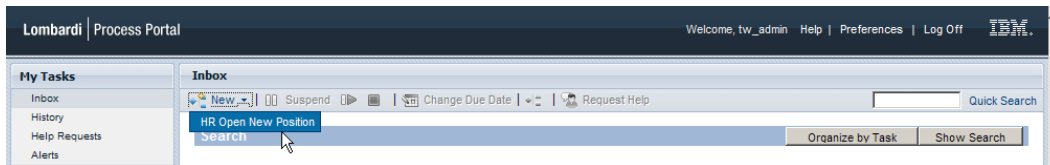
3. Lombardi Process Portal starts the process and sends tasks to the inboxes of process participants who can complete the first activity (step) in the process, as shown in the following image.
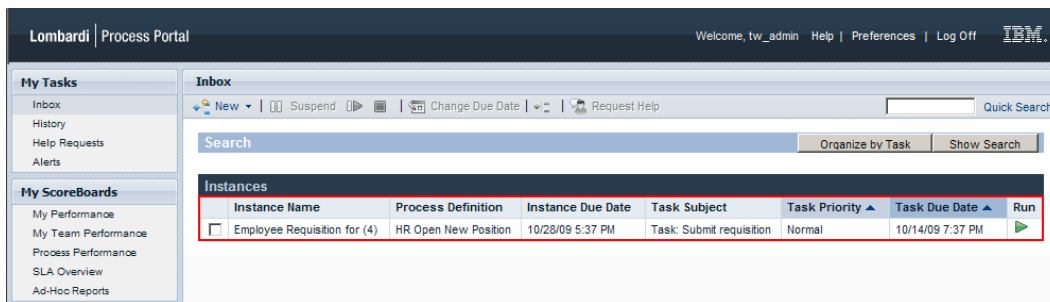
If you start a process and you are also a member of the participant group assigned to complete the first activity in the process, you receive a notice that the process has been started and the Process Portal generates a task in your Inbox. If you do not run the task, the task remains in your Inbox and the Run icon (green triangle) indicates that the task has not been started by any of the assigned users.

If you start a process and you are not a member of the participant group assigned to complete the first task, you receive a notice that the process has been started. Plus, the first task appears in the Inbox of each process participant who can complete the task.

For more information about managing process instances, see Viewing and managing process instances from the Inbox and Viewing and managing process instances from the instance details page. For more information about managing tasks from the process instance details page, see Taken beheren.

Viewing and managing process instances from the Inbox

From your Inbox in Lombardi Process Portal, you can view and run tasks that are assigned to you or a participant group of which you are a member. To view your Inbox, select **My Tasks** > **Inbox**. The following example shows a list of several tasks in the Inbox. Tasks are displayed according to the process instance that generated each task. You can click the name of a column to sort the data in the column. To start a task for a process instance, click the Run icon (green triangle).

To view tasks that are assigned to other users and groups, use the My Team Performance scoreboard as described in Viewing scoreboards.

If you have permission to use process management functions (see Restricting access to Process Portal functions), you can manage the process instances that generated the tasks in your Inbox. To manage a process instance from this view, you need to select the c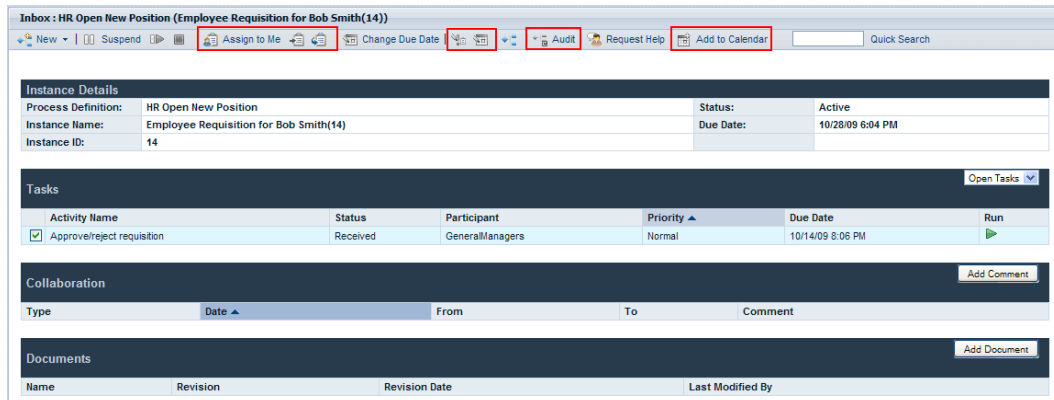heck box next to the process instance and choose the toolbar icon for the function that you want to perform. For example, you can suspend the process instance or request help from other process participants. For some functions, you can select multiple process instances and simultaneously apply the specific function to all selected process instances. For example, you can simultaneously change the due date of multiple process instances.
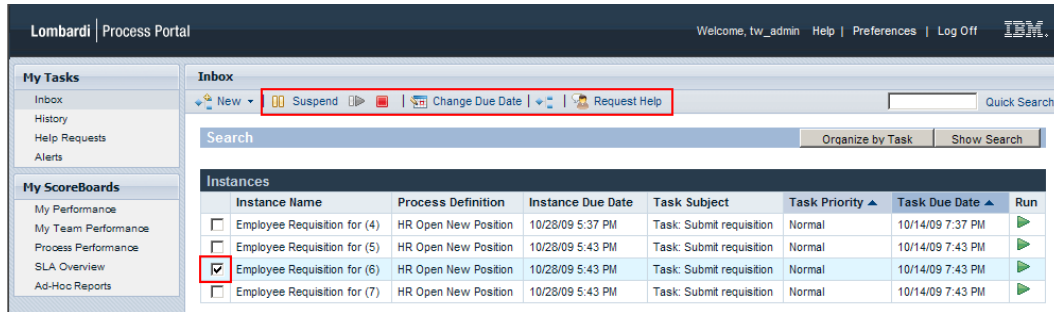
Viewing and managing process instances from the instance details page

To view detailed information about a process instance, from **My Tasks** > **Inbox** click on the name of the process instance in your Inbox to display its details page. From the process instance details page, you can perform all the functions that are available from the Inbox, such as suspending the process instance or requesting help from other process participants. The process instance details page enables you to perform additional functions that you cannot perform from the Inbox, such as assigning tasks to process participants, changing the due date of a task, and changing the priority of a task. The following image shows the toolbar icons for the additional functions that you can perform from the process instance details page.

The process instance details page contains the following sections:

Instance Details	Includes the name of the business process definition (BPD), the process instance name, the instance ID, the current status (for example, active or suspended), and the due date by which the process instance must be completed.
Taken	Lists the tasks that are associated with the process instance. You can choose to show all tasks or only open (pending) tasks. For each open task, you can click the Run icon (green triangle) to start the task. You can see the name of the activity in the BPD that is associated with each task, the task status (for example, received or completed), the user or group to whom the task is assigned, the task priority (for example, low, normal, or high), and the due date by which the assigned user or group must complete the task. Click on the activity name to view the task details. Voor meer informatie raadpleegt u Taken beheren.

Collaboration	View help requests and comments posted by process participants. For more information see Samenwerken bij taken.
Documents	Upload documents that are related to the process instance. Voor meer informatie raadpleegt u Working with documents.

Suspending a process instance

You can suspend a process instance to temporarily deactivate the process instance. When suspended, the process instance and its related tasks cannot be completed. For example, you might need to halt work on a process instance for a short period of time to adjust the due dates of the process instance and tasks. The suspended process instance remains inactive until you resume the process instance.

To suspend a process instance, you must have permission as described in Restricting access to Process Portal functions.

1. From **My Tasks** > **Inbox**, click on the name of the process instance that you want to suspend.

2. From the process instance details page, click **Suspend** on the toolbar as shown in the following image.

3. The process instance is deactivated, and the status changes to suspended. The Run icon (green triangle) for the current task is disabled. The current task remains in the Inbox of the process participants to whom the task is assigned.

From your Inbox, you can select and suspend multiple process instances simultaneously, as described in Viewing and managing process instances from the Inbox.

Resuming a suspended process instance

You can resume a suspended process instance to restore the process instance to an active state. When resumed, the process instance and its related tasks can be completed.

To resume a process instance, you must have permission as described in Restricting access to Process Portal functions.

1. From **My Tasks** > **Inbox**, click on the name of the suspended process instance that you want to resume.

2. From the process instance details page, click the **Resume** icon on the toolbar as shown in the following image.

3. The process instance status changes to active and the Run icon (green triangle) for the current task is enabled in the inboxes of process participants to whom the task is assigned.

From your Inbox, you can select and resume multiple suspended process instances simultaneously, as described in Viewing and managing process instances from the Inbox.
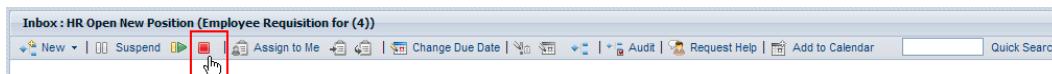
Terminating a process instance

You can permanently terminate a process instance so that process participants can no longer access the associated tasks and the process instance cannot be completed. For example, you might need to terminate the process if there is a problem with the implementation of the business process definition (BPD) or the execution of its underlying services.

To terminate a process instance, you must have permission as described in Restricting access to Process Portal functions.

1. From **My Tasks** > **Inbox**, click on the name of the process instance that you want to terminate.

2. From the process instance details page, click the **Terminate** icon on the toolbar as shown in the following image.

3. The process instance moves from your Inbox to your History and the status changes to terminated. The Run icon (green triangle) for the current task is permanently disabled, and the process instance is removed from the inboxes of all process participants to whom the current task is assigned.

From your Inbox, you can select and terminate multiple process instances simultaneously, as described in Viewing and managing process instances from the Inbox.

Starting ad-hoc processes

You can start an ad-hoc process at any point during the execution of a process instance. An ad-hoc process has access to all the data of the executing process instance and can also manipulate its process flow.

The business process definition (BPD) must include a Start Ad-hoc Event to enable the execution of an ad-hoc process. For more information, see *Modeling events* in *Lombardi Authoring Environment User Guide*.

Common ad-hoc process patterns include:

• Execute an additional approval step.

• Report on the status of an order request.

- Cancel a customer's order at any time.

To start an ad-hoc process within a process instance:

> To start ad-hoc processes in Lombardi Process Portal, you must have permission as described in Restricting access to Process Portal functions.

1. From **My Tasks** > **Inbox**, click on the name of the process instance.

2. From the process instance details page, click the **Show Process Instance Diagram** icon on the toolbar as shown in the following image.

> For more information about viewing process instance diagrams, see Viewing process progress.
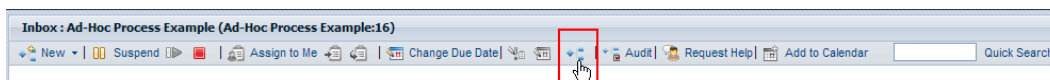
3. Click **View as Flash** at the top of the window.

4. Right-click inside the diagram and select **Initiate Flow** to start one or more available ad-hoc processes.

> The **Initiate Flow** option is not available if the BPD you are viewing does not include a Start Ad-hoc Event.
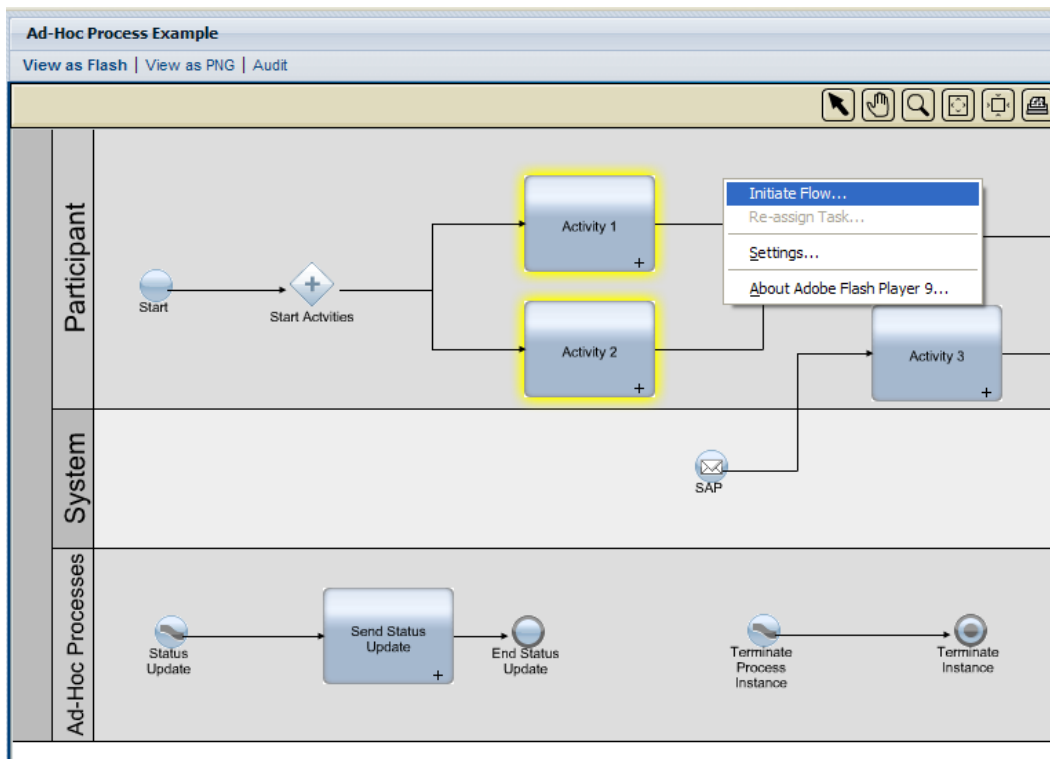
5. A menu opens with a list of ad-hoc processes. Select the ad-hoc process that you want to start. In the following example, the ad-hoc process named **Status Update** is selected from the menu.
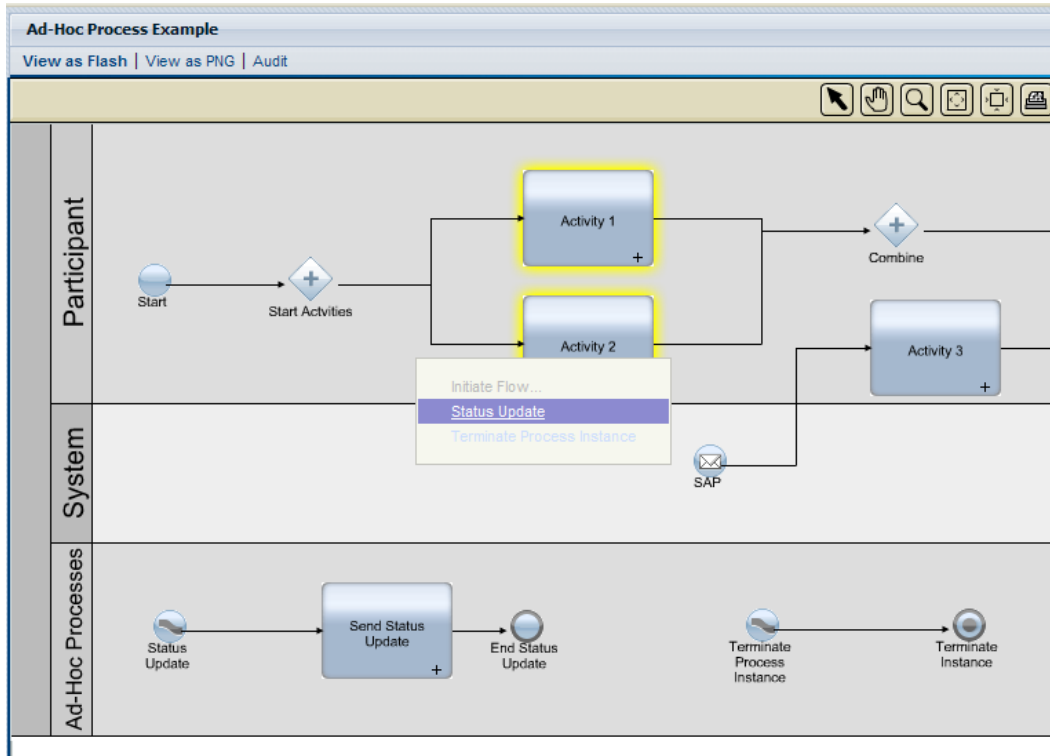
6. This starts an instance of the ad-hoc process. In the following example, the activity named **Send Status Update** (highlighted in yellow) generates a task that contains the status of the regular process instance. You can hover the mouse pointer over the activity to view the task details.

Starting and managing processes
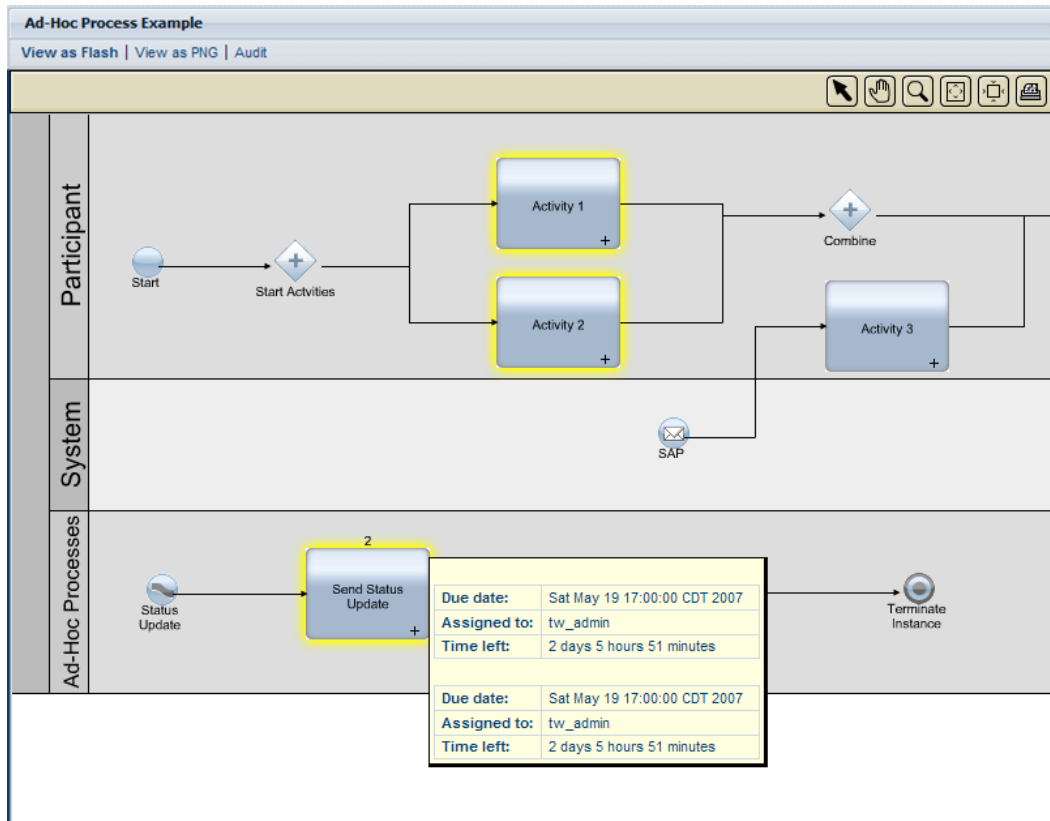
Changing the due date of a process instance

As the current process instance progresses and process participants complete their tasks, you can modify the process instance due date as issues emerge or as the availability of process participants changes. For example, if process participants are completing their tasks ahead of schedule, you can move the process instance due date up. Conversely, if process participants are not completing their tasks on time, you can push the process instance due date back. When a due date is changed, all users who have tasks from the affected process instance can see the new date in their Inbox.

To change the due date of a process instance, you must have permission as described in Restricting access to Process Portal functions.

1. From **My Tasks** > **Inbox**, click on the name of the process instance whose due date you want to change.

2. From the process instance details page, click the **Change Due Date** icon on the toolbar as shown in the following image.


3. In the Choose a New Due Date and Time dialog box, specify a new due date and time and then click **OK**.

Select the **Allow changes even if they conflict with the assigned users Work Schedules** option if you want to allow date and time changes even if they conflict with the work schedules established for the BPD and its activities in Lombardi Authoring Environment. (See *Setting the work schedule for a BPD* in *Lombardi Authoring Environment User Guide* for more information.)

4. The new date and time are displayed in the Instance Details section of the process instance details page.

Changing the due date of a process instance does not affect the due dates of tasks that have not yet been completed. If you change the due date of a process instance, you might also need to change due dates of the remaining tasks. Zie De vervaldatum van een taak wijzigen voor meer informatie.

Een procesinstance toevoegen aan een Outlook-agenda

If you are running Lombardi Process Portal on Windows with Microsoft Outlook, you can add a process instance to your Outlook calendar so that the process instance becomes an appointment in your calendar. This enables you to monitor process instance due dates in your Outlook client. For example, if you need to approve expense reports and each of the incoming reports is represented by a process instance, you can create an appointment for each incoming report so that you receive a reminder when each instance is nearing its due date.

1. From **My Tasks** > **Inbox**, click on the name of the process instance that you want to add to your Outlook calendar.

2. From the process instance details page, click the **Add to Calendar** icon on the toolbar as shown in the following image.
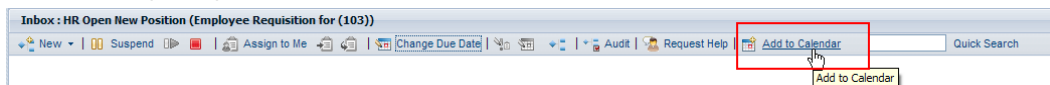
3. Download the calendar file (`getCalendar.do`) when prompted by your Web browser.

4. A new appointment is created in the Microsoft Outlook client. The appointment name and subject name are the same as the name of the process instance.

    You can specify a start time and end time for the Outlook reminder. The appointment message field includes a hyperlink that takes you directly to the process instance in Lombardi Process Portal when the instance is nearing its due date. Save and close the reminder when you are finished.

Viewing process progress

For each process instance in your Inbox, you can view a process diagram and see the currently executing step. As process participants complete their assigned tasks, the process instance progresses from step to step along the process diagram. Lombardi Process Portal uses Adobe Flash Player to render an interactive view of the process diagram, enabling you to easily access current data at each step of the process.

To view process diagrams, you must have permission as described in Restricting access to Process Portal functions.

To view the process diagram for a process instance:

1. From **My Tasks** > **Inbox**, click on the name of the process instance that you want to view.

2. From the process instance details page, click the **Show Process Instance Diagram** icon on the toolbar as shown in the following image.
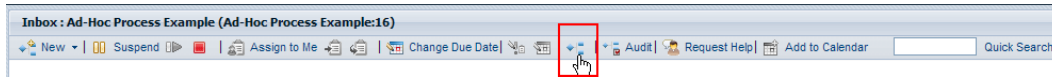
The process diagram opens in a new window.

3. Click **View as Flash** at the top of the window. The current activity in the process diagram is highlighted in yellow.

4. Hover the mouse pointer over the activity within the diagram to view its status. A tooltip shows information such as the activity's due date, the process participant assigned to perform the task(s) associated with the activity, and the time remaining for the activity to be completed.
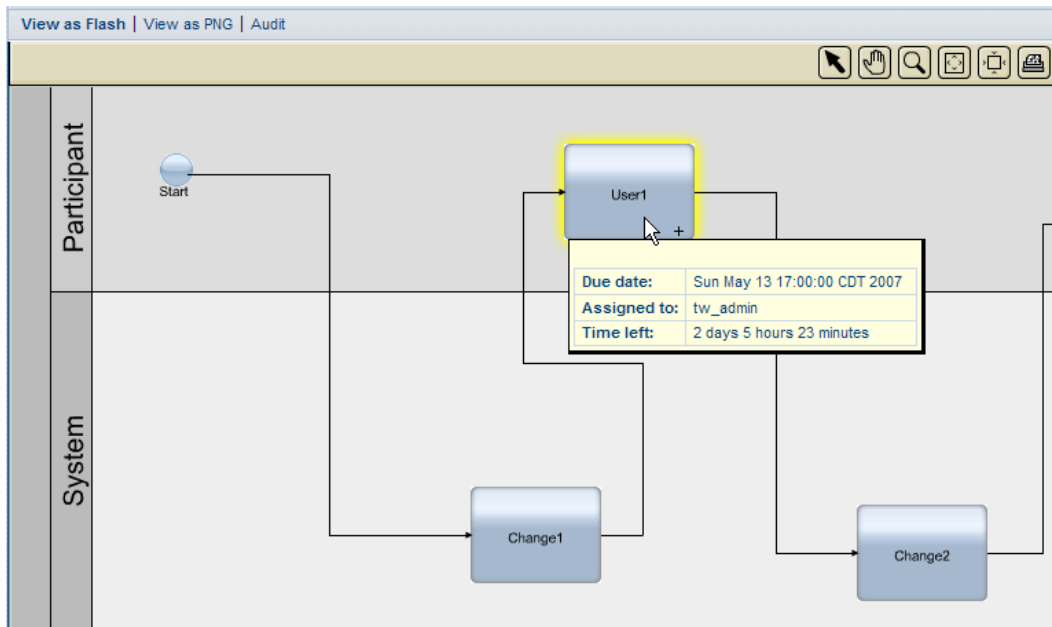

5. Click **View as PNG** at the top of the window to view an image file that you can save to your file system.

You can click **Audit** at the top of the window to display business variable data for the process instance. Voor meer informatie raadpleegt u Audit uitvoeren op procesgegevens.

EPV's beheren (exposed process values)

EPV's (exposed process values) zijn variabelen die door bepaalde gebruikers kunnen worden veranderd terwijl de processen worden uitgevoerd. Wijzigingen in deze waarden kunnen van invloed zijn op de stroom van procesinstances, toewijzingen van taken enzovoorts in Lombardi Process Portal. For example, certain users might be allowed to change the dollar amounts for expenditures that require approval, thereby impacting which expenditures go through an approval step and who must perform the approval. For more information, see *Creating exposed process values (EPVs)* in *Lombardi Authoring Environment User Guide*.

In Lombardi Process Portal, you can change EPVs that are included in a Lombardi report. If a Lombardi report includes one or more EPVs, the Manage EPVs option displays at the top of the report.

If the EPV that you want to manage is not included in a report, you can change the values of configured EPVs and set the date and time at which you want each new value to take effect in the Process Admin Console. See *Managing exposed process values (EPVs)* in *Lombardi Administration Guide* for more information.

1. Click the **Manage EPVs** option at the top of the report.

2. Using the drop-down menu, select the process application snapshot that contains the EPV that you want to modify.

3. Using the drop-down menu, select the EPV that you want to edit.

    The Process Portal displays the variable values in the EPV that you can modify as shown in the following image:

4. Click the row of the variable that you want to change and then click the **New** button shown in the following image.

5. In the Exposed Process Value pop-up window, enter a new value, set the date and time at which you want the new value to take effect, and click the **OK** button.

6. Repeat steps 5 and 6 for each variable that you want to modify. You can enter multiple values for the same variable, each taking effect at a different time.

    The Process Portal displays all modifications for each variable in a separate table as shown in the following image:

7. Click a row and then use the Edit and Delete buttons to change or remove your modifications, if necessary.

Taken beheren

In de volgende gedeelten leest u hoe u taken kunt beheren die zijn gegenereerd door een actieve procesinstance in Process Portal for IBM Websphere Lombardi Edition.

Voordat u een van de volgende taken uitvoert:

- You need to be a member of a participant group assigned to the activities in a business process definition (BPD) as described in Configuring processes.

- You must have permission to use task management functions in Lombardi Process Portal as described in Restricting access to Process Portal functions.

- Log in to Lombardi Process Portal as explained in Starting Lombardi Process Portal.

- At least one instance of a BPD in which you are a participant must be running as described in Starting and managing processes.

See the following topics to learn more about managing tasks:

Voor meer informatie...	Zie...
View and manage tasks from the process instance details page.	Viewing and managing tasks
Assign tasks to yourself or assign tasks to other Lombardi users and groups.	Taken toewijzen
Change task due dates to ensure that all tasks required to complete a process instance are performed within the specified time frame.	De vervaldatum van een taak wijzigen
Change the priority of a task as needed to escalate or de-escalate the task.	De prioriteit van een taak wijzigen
View the history of tasks that previously resided in your Inbox but are no longer active.	Viewing task execution history

Viewing and managing tasks

When a process instance starts, Lombardi Process Portal sends tasks to the inboxes of process participants who can complete the first activity (step) in the process, as shown in the following image. From **My Tasks** > **Inbox**, you can view and run tasks that are assigned to you or a participant group of which you are a member. Tasks are displayed according to the process instance that generated each task. To start a task for a process instance, click the Run icon (green triangle).
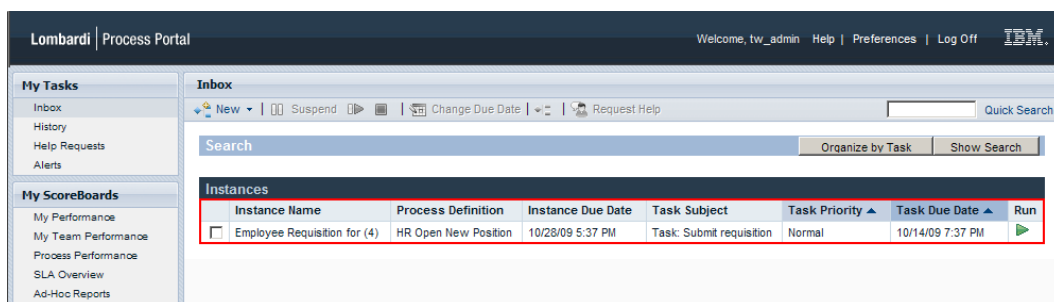
If you have permission to use task management functions (see Restricting access to Process Portal functions), you can manage the tasks in your Inbox. Click on the name of a task in your Inbox to open the process instance details page. In the Tasks section of the process instance details page, you can see the name of the activity in the BPD that is associated with each task, the task status (for example, received or completed), the user or group to whom the task is assigned, the task priority (for example, low, normal, or high), and the due date by which the assigned user or group must complete the task. For each open task, you can click the Run icon (green triangle) to start the task. Each completed task shows the date and time that the task was closed.

To manage a task from this view, you need to select the check box next to the task and choose the toolbar icon for the function that you want to perform. For example, you can assign a task to a different Lombardi user or group. For some functions, you can select multiple tasks and simultaneously apply the specific function to all selected tasks. For example, you can simultaneously change the due date of multiple tasks. The following sections provide detailed instructions for completing these functions for Lombardi tasks.
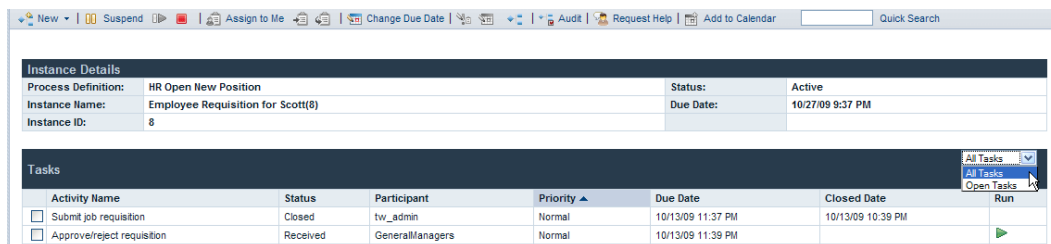
From this view, you can click on an activity name to view additional details about each task.

Taken toewijzen

In de volgende gedeelten leest u hoe u taken kunt toewijzen aan gebruikers van en groepen in Lombardi.

Om taken toe te wijzen moet u de machtigingen hebben zoals beschreven in Restricting access to Process Portal functions.

Een taak aan een gebruiker of een groep toewijzen

Als u een taak in uw postvak IN toewijst aan een groep, kunnen alle gebruikers die lid zijn van die groep de taak openen en uitvoeren. Als u een taak in uw postvak IN toewijst aan een andere gebruiker, kan die gebruiker de taak openen en uitvoeren. Na het toewijzen van een taak aan een groep verschijnt de taak in het postvak IN van elke gebruiker die lid is van de groep.

1. Vanuit **Mijn taken** > **Postvak IN** klikt u op de naam van de taak.

2. In the Tasks section of the process instance details page, select the check box next to the task that you want to assign.

3. Click the **Reassign Task to a User or Group** icon on the toolbar as shown in the following image.

4. In the Choose a New User or Group dialog box, specify the name of the Lombardi user or group to which the process instance will be assigned and then click **OK**.

The name of the new assignee is displayed in the Participant field in the Tasks section of the process instance details page.

You can also assign tasks to a user or a group when viewing the process instance diagram, as described in Assigning tasks from a process instance diagram.

Assigning a task to yourself

If a task is currently assigned to a group and you are a member of the group, you can assign the task to yourself so that only you can run the task.

1. Vanuit **Mijn taken** > **Postvak IN** klikt u op de naam van de taak.

2. In the Tasks section of the process instance details page, select the check box next to the task that you want to assign.

3. Click the **Assign to Me** icon on the toolbar as shown in the following image.

The name of the new assignee is displayed in the Participant field in the Tasks section of the process instance details page.

When you run a task that is currently assigned to a group and you are a member of the group, the task is automatically assigned to you.

Reassigning a task to a previously assigned group

If a task is currently assigned to you, you can assign the task to the group to which the task was previously assigned.

1. Vanuit **Mijn taken** > **Postvak IN** klikt u op de naam van de taak.

2. In the Tasks section of the process instance details page, select the check box next to the task that is assigned to you.

3. Click the **Reassign Task Back to Group** icon on the toolbar as shown in the following image.

The name of the new assignee is displayed in the Participant field in the Tasks section of the process instance details page.

You can also assign a task to a group when viewing the process instance diagram, as described in Assigning tasks from a process instance diagram.

Assigning tasks from a process instance diagram

Lombardi Process Portal also enables you to assign tasks to users and groups from the Flash view of a process instance diagram as described in the following procedure.

1. Vanuit **Mijn taken** > **Postvak IN** klikt u op de naam van de taak.

2. From the process instance details page, click the **Show Process Instance Diagram** icon on the toolbar as shown in the following image.
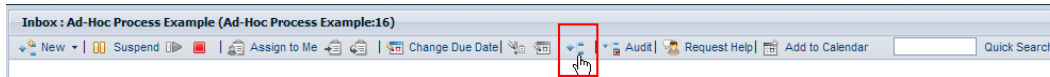
The process diagram opens in a new window.

3. Click **View as Flash** at the top of the window.

4. Right-click the current activity (highlighted in yellow) in the process diagram and then select **Reassign Task**, as shown in the following image.
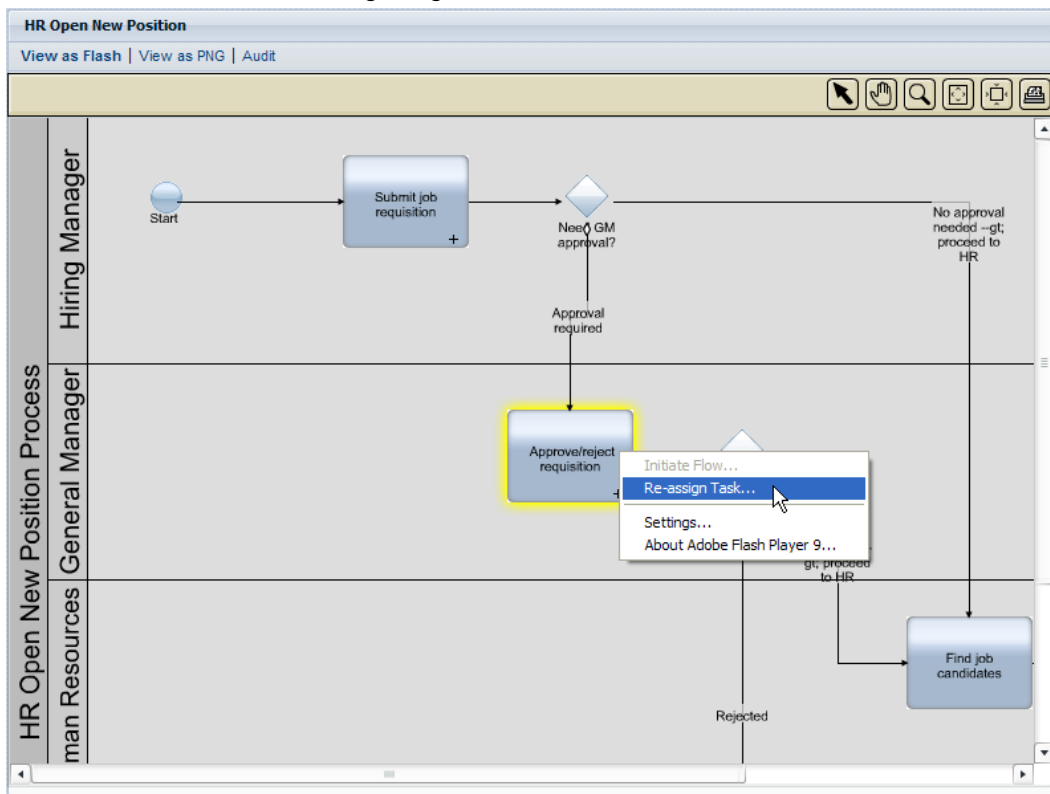
5. From the pop-up menu, select one of the following options:

Reassign Task Back to Group	Assigns the task to the group to which the task was previously assigned.
Reassign Task to a User or Group	Specify the name of the user or group to which you want to assign the task and then click **Submit**.

For more information about viewing process instance diagrams, see Viewing process progress.

De vervaldatum van een taak wijzigen

De vervaldatum van een taak geeft de datum en de tijd aan waarop de gebruiker of de groep aan wie de taak is toegewezen, de taak moet voltooien. De aanvankelijk vervaldatum van elke taak wordt bepaald door de BPD (business process definition). You can change task due dates as needed to ensure that all tasks required to complete a process instance are performed within the specified time frame.

To change the due date of a task, you must have permission as described in Restricting access to Process Portal functions. Changing the due date of a task in a process instance does not affect the due date of the overall process instance or the due dates of other tasks. If you change the due date of a task, you might also need to change the due date of other remaining tasks or the due date of the process instance as described in Changing the due date of a process instance.

1. Vanuit **Mijn taken** > **Postvak IN** klikt u op de naam van de taak.

2. In the Tasks section of the process instance details page, select the check box next to the task whose due date you want to change.

3. Click the **Change Task Due Date** icon on the toolbar as shown in the following image.
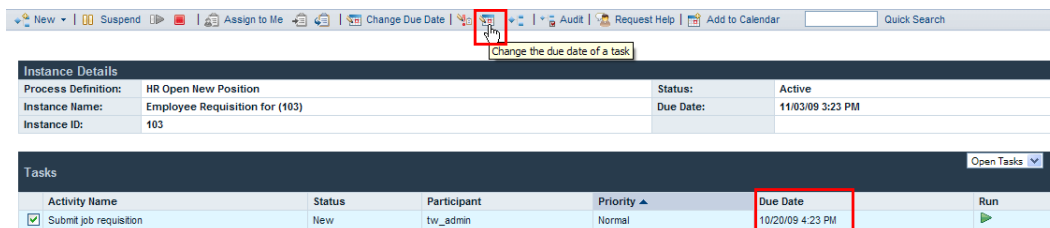
4. From the Choose a New Due Date and Time dialog box, select the a new due date and time and click **OK**. Select the **Allow changes even if they conflict with the assigned users Work Schedules** option if you want to allow date and time changes even if they conflict with the work schedules established for the BPD and its activities in Lombardi Authoring Environment. (See *Setting the work schedule for a BPD* in *Lombardi Authoring Environment User Guide* for more information.)

   The new due date and time are displayed in the Due Date field in the Tasks section of the process instance details page.

De prioriteit van een taak wijzigen

U kunt de prioriteit van een taal wijzigen om deze te escaleren of te de-escaleren. Dit is met name handig als een groep van deelnemers van het proces veel open taken heeft en u ze een richtlijn wilt geven voor de prioriteit bij het uitvoeren van de taken. For example, when responding to a ticket from a customer that contains multiple issues, a customer support manager can escalate the priority of specific tasks so that the customer's most critical issues are addressed as quickly as possible.

To change the priority of a task, you must have permission as described in Restricting access to Process Portal functions. When you change the priority of a task, you might also need to change the due date of the task to reflect its new priority as described in De vervaldatum van een taak wijzigen.

1. Vanuit **Mijn taken** > **Postvak IN** klikt u op de naam van de taak.

2. In the Tasks section of the process instance details page, select the check box next to the task whose priority you want to change.

3. Click the **Change Priority** icon on the toolbar as shown in the following image.
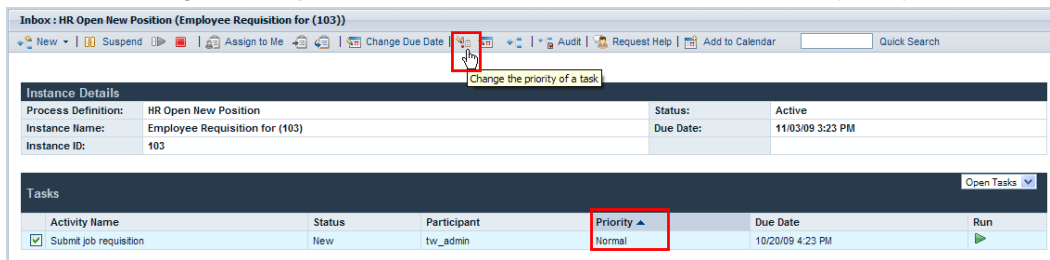
4. In the Choose a New Priority dialog box, select the new priority (highest, high, normal, low, or lowest) from the drop-down list and then click **OK**.

   The new priority level is displayed in the Priority field in the Tasks section of the process instance details page and also in the inboxes of all assigned participants.

Viewing task execution history

To view the history of your tasks, select **MyTasks** > **History**. The Process Portal displays the list of tasks that previously resided in your Inbox but are no longer active. Tasks are displayed according to the process instance that generated each task. You can click on the name of a process instance to view the process instance details page. The tasks listed in your History do not require your action, and the Run icon (green triangle) is disabled for each task, as shown in the following image.

The following table describes different kinds of process status you might see in your History:

Process instance status	Beschrijving
Voltooid	All tasks related to the process instance are complete, and no further action is required from any process participants.
Actief	The process instance is currently in progress and contains open tasks. Only tasks that are inactive are visible in your History. Be sure to check both your Inbox and your History to ensure that you are aware of all tasks associated with active process instances. If you have already completed tasks associated with an active process instance but still need to complete additional tasks that are assigned to you, the pending tasks are displayed in your Inbox and the completed tasks are displayed in your History.
Beëindigd	The process instance and its associated tasks have been permanently terminated. For more information, see Terminating a process instance.

Process instance status	Beschrijving
Is mislukt	A process instance may fail if there is a problem with the implementation of the business process definition (BPD) or its underlying services, and so the related tasks are no longer active.

Running tasks

Read the following sections to learn how to run tasks in Process Portal for IBM Websphere Lombardi Edition.

Before you can run tasks from Lombardi Process Portal:

- You need to be a member of a participant group assigned to the activities in a business process definition (BPD) as described in Configuring processes.

- Log in to Lombardi Process Portal as explained in Starting Lombardi Process Portal.

- At least one task must be assigned to you in a running process instance as described in Taken toewijzen.

See the following topics to learn more about running tasks.

Voor meer informatie...	Zie...
Start a task for a process instance from your Process Portal Inbox.	Running a task from the Inbox
Start a task for a process instance when viewing the task from the process instance details page.	Running a task from the process instance details page
Supply the required information in a Coach or a series of Coaches to complete a task.	Working with Coaches
Exchange information with other process participants to complete assigned tasks.	Samenwerken bij taken

Running a task from the Inbox

From your Inbox, you can run tasks that are assigned to you or to a participant group of which you are a member.

1. Select **My Tasks** > **Inbox**. In your Inbox, tasks are displayed according to the process instance that generated each task.

2. Click the Run icon (green triangle) for the task that you want to start. The task generates a Coach that you can fill out to complete the task, as described in Working with Coaches.

> If you run a task but do not complete the task, the task remains in your Inbox and the Run icon (green triangle) indicates that the task has not been completed. When you run a task that is currently assigned to a group and you are a member of the group, the task is automatically assigned to you.

Running a task from the process instance details page

Before running a task, you might want to view additional details about the task. You can start a task for a process instance when viewing the task from the process instance details page.

1. Select **My Tasks** > **Inbox**. In your Inbox, tasks are displayed according to the process instance that generated each task.

2. Click on the name of the task that you want to start.

3. In the Tasks section of the process instance details page, click the activity name to see additional details about the task.

When ready, click the Run icon (green triangle) icon to start the task. The task generates a Coach that you can fill out to complete the task, as described in Working with Coaches.

If you run a task but do not complete the task, the task remains in the Tasks section of the process instance details page and the Run icon (green triangle) indicates that the task has not been completed. When you run a task that is currently assigned to a group and you are a member of the group, the task is automatically assigned to you.

Working with Coaches

Coaches are the Web-based interfaces where process participants do the work that is required to complete each task. Coaches may include information about the task or process and various controls, such as drop-down lists, edit boxes, check boxes, and radio buttons that enable you to provide your own input into the process. The Coaches for tasks in a process instance are generated by the underlying services for the activities in the business process definition (BPD). For more information, see *Building Coaches* in *Lombardi Authoring Environment User Guide*.

When you run a task in Lombardi Process Portal, the task opens a Coach in a new window. For each task you may be required to complete one Coach or a series of Coaches. Fill in the information required to complete the Coach and then submit the information.

In the following example, a task generates a series of Coaches that enable a hiring manager to create a job requisition:

1. The hiring manager fills out the requisition information and then clicks the **Next** button.

2. The hiring manager reviews the information in the Coach and then clicks the **Submit** button to complete the task.

When you complete a task, the task moves from your Inbox to your History as described in Viewing task execution history. Another task can be generated in the same process instance, or the process instance may completed depending on the overall progress of the process instance.

Samenwerken bij taken

Deelnemers aan processen kunnen samen aan taken werken om ervoor te zorgen dat ze op tijd af zijn en dat er voldaan wordt aan de doelen van de procesversie. In de volgende gedeelten leest u hoe u hulp kunt vragen bij andere deelnemers van het proces, hoe u aanvragen voor hulp kunt bekijken die binnenkomen van andere deelnemers, hoe u commentaar kunt toevoegen aan een procesinstance en hoe u taakgerelateerde berichten kunt genereren en bekijken.

Een verzoek om hulp maken

Process participants can collaborate on a process instance and its related tasks by submitting help requests to each other. For example, if you do not understand a specific task or cannot complete the task, you can request help from other process participants. If you receive a help request from another process participant, you can either answer or ignore the help request.

 To create a help request, you must have permission as described in Restricting access to Process Portal functions.

1. From **My Tasks** > **Inbox**, click on the name of the process instance on which you want to request help.

2. From the process instance details page, click the **Request Help** icon on the toolbar as shown in the following image.

3. In the Add Help Request dialog box, type the Lombardi user name of the individual who will receive the help request in the **To** field. Add a comment to the help request and then click **Save**.

 To send a help request to a group, enter ROLE:<group name> in the **To** field, where <group name> is the name of the Lombardi security group such as tw_authors. The help request will be sent to all members of the specified group.

4. The help request is posted in the Collaboration section of the process instance details page, as described in Viewing help requests.

Viewing help requests

If you receive a help request from another process participant, you can either answer or ignore the help request.

To respond to a help request, you must have permission as described in Restricting access to Process Portal functions.

1. From **My Tasks** > **Help Requests**, click on the name of the process instance or task that contains the help request that you want to view.

2. The Collaboration section in the process instance details page lists help requests that you have sent and received, including the date, the sender, the recipient, and the help message. Click on the help request to view its details.

3. In the View Help Request dialog box, click **Reply** to answer the help request or click **Ignore** to ignore the help request. If you are replying, add your message to the Reply to Help Request dialog box, and then click **Save**.

4. Your response to the help request is posted in the Collaboration section of the process instance details page where the sender of the help request can view your response.

Adding a comment to a process instance

Process participants can collaborate on a process instance and its related tasks by adding comments to the process instance. For example, you can use comments to communicate status updates to other process participants. Unlike help requests, comments generally are informative and do not require a response.

To add a comment to a process instance, you must have permission as described in Restricting access to Process Portal functions.

1. From **My Tasks** > **Inbox**, click on the name of the process instance on which you want to comment.

2. From the process instance details page, click the **Add Comment** button in the Collaboration section as shown in the following image.

3. In the Add Comment dialog box, `Everyone` is specified in the **To** field by default. Add a comment and then click **Save**.

You cannot specify a Lombardi user or group in the **To** field.

4. The comment is posted in the Collaboration section of the process instance details page. All other process participants can view the comment.

Generating alerts

Process participants can collaborate on a process instance and its related tasks by generating task-related alerts. Alerts are directives that are automatically sent to a specific user or group when a process participant runs a task for an activity in a business process definition (BPD) whose underlying service contains a Send Alert component. Alerts are similar to comments in that alerts are informative and do not require a response.

The recipients, the priority, the subject, and the message of an alert are determined by the Send Alert component in the underlying service. When the alert is generated, the recipients of the alert can view the alert in Lombardi Process Portal, as described in Viewing alerts.

For more information about configuring a Send Alert component for a service, see *Understanding service components* in *Lombardi Authoring Environment User Guide*.

Viewing alerts

To view a task-related alert:

1. Select **My Tasks** > **Alerts**.

2. Click on the name of the instance that contains the alert that you want to view.

   The Task Narrative section of the process instance details page displays the alert message. The Collaboration section of the process instance details page displays the alert date, the sender, the recipient, and also the alert message. The process participant who started the task that generated the alert is the sender of the alert.

3. Click on the alert in the Collaboration section of the process instance details page to view the alert details in the View Alert dialog box.

Working with documents

Sometimes process participants may need additional information to complete their tasks or may need to provide information that is specific to a process. Documents enable you to provide important information about the tasks you are completing. Process Portal for IBM Websphere Lombardi Edition enables you to attach documents, including files and URLs, to a process instance and manage the documents as needed to complete the process. For example, when writing a grant proposal for submission to a prospective donor, you might begin with a document template and then attach several versions of the document to the process instance as the proposal is reviewed and revised. As each document is revised, you can upload new versions of the document and view the document's revision history.

Voordat u een van de volgende taken uitvoert:

- You need to be a member of a participant group assigned to the activities in a business process definition (BPD) as described in Configuring processes.

- Log in to Lombardi Process Portal as explained in Starting Lombardi Process Portal.

- At least one instance of a BPD in which you are a participant must be running as described in Starting and managing processes.

See the following topics to learn more about working with documents:

Voor meer informatie...	Zie...
Upload a document to a process instance from the process instance details page.	Attaching documents to a process instance
View documents that process participants have attached to a process instance.	Viewing documents that are attached to a process instance
Upload a new version of an existing document to a process instance and view the document's revision history.	Revising documents that are attached to a process instance
Upload and manage documents from a Coach when completing a task.	Attaching documents to a Coach

Attaching documents to a process instance

To attach a document to a process instance:

1. From **My Tasks** > **Inbox**, click on the name of the process instance.

2. In the Documents section of the process instance details page, click the **Add Document** button as shown in the following image.
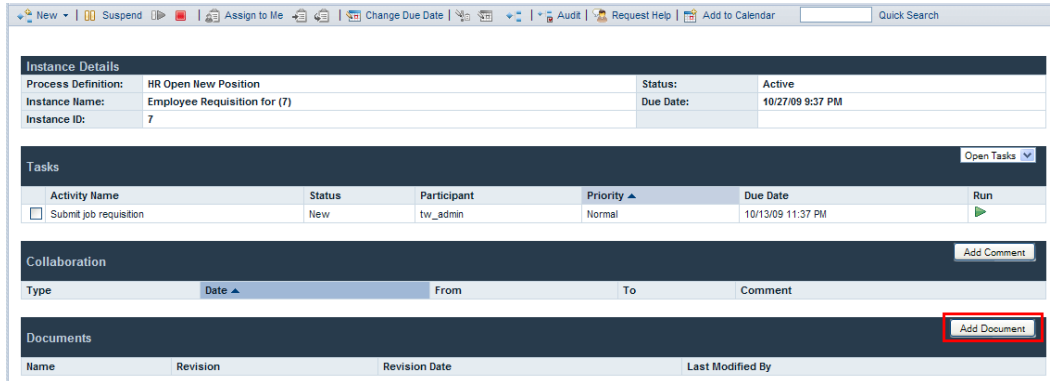
3. In the Add Document dialog box, specify a name for the document in the **Document Name** field. From the **Document Type** drop-down list, select **File** or **URL**.

4. If you are adding a file, click the **Browse** button and select the file. If you are adding a URL (e.g. `http://www.myserver.com`), specify the URL. Click **Submit** to upload the document.

5. The uploaded document is posted in the Documents section of the process instance details page. The name that you specified in the Document Name field in the Add Document dialog box is displayed in the Name column.

Viewing documents that are attached to a process instance

To view a document that is attached to a process instance:

1. From **My Tasks** > **Inbox**, click on the name of the process instance.

2. In the Documents section of the process instance details page, click on the name of the document that you want to view.

3. Click on the file name or URL to open the document.

Revising documents that are attached to a process instance

To add a new version of an existing document to a process instance:

1. From **My Tasks** > **Inbox**, click on the name of the process instance.

2. In the Documents section of the process instance details page, click on the name of the document that you want to update.

3. Click the **Add Document Version** button as shown in the following image.

Documents				Add Document Version
Version	**Filename**	**Type**	**Modified By**	**Last Modified Date**
1	elements..txt	File	Internal TW Admin user	10/20/2009 10:26 PM

4. In the Add Document Version dialog box, specify the document type and the file name or URL, and then click **Submit** to upload the document.

5. The list of documents refreshes, displaying the new version of the document, the version number, the file name, the document type, the user who last modified the document, and the last modified date.

When you add a new version of a document to a process instance, the file name and document type of the new version do not need to match the file names and document types of the previous versions.

Documents				Add Document Version
Version	**Filename**	**Type**	**Modified By**	**Last Modified Date**
2	elements..txt	File	Internal TW Admin user	10/20/2009 10:27 PM
1	elements..txt	File	Internal TW Admin user	10/20/2009 10:26 PM

Attaching documents to a Coach

Some Lombardi Coaches enable you to upload and view documents when completing a task for a process instance.

Before performing the following tasks, a developer in Lombardi Authoring Environment must have enabled document uploading for the Coach. Viewing and uploading of documents from the Coach may be restricted depending on the properties that the developer specified for the Coach. For more information, see *Attaching documents to a Coach* in *Lombardi Authoring Environment User Guide*.

To upload a document from a Coach:

1. Click the **Add Document** button, as shown in the following image.

Supporting Documents
No Documents Attached
Add Document

2. Specify a name for the document in the **Title** field. From the **Type** drop-down list, select **File** or **URL**. If you are adding a file, click the **Browse** button and select the file. If you are adding a URL (e.g. `http://www.myserver.com`), specify the URL. Click **OK** to upload the document.

You must specify a document name in the **Title** field when uploading a document from a Coach.

To add a new version of an existing document to a Coach:

1. Click the **Update** option for the document, as shown in the following image.

2. Click the **Browse** button to choose the updated version of the file. Click **OK** to upload the document.

   The list of documents refreshes, displaying the new version number, the user who last modified the document, and the revision date.

Working with reports

Reports enable you to analyze the performance of process instances and the process participants who complete tasks within those instances. See the following topics to learn more about using reports to analyze process performance in Process Portal for IBM Websphere Lombardi Edition:

Voor meer informatie...	Zie...
Analyze process performance by viewing custom reports and scoreboards, as well as standard scoreboards.	Viewing scoreboards
Export performance and reporting data to a comma separated value file (CSV) for use in external programs.	Rapportgegevens exporteren
Create customized reports from business variable data using the Ad-Hoc Report Wizard.	Creating ad-hoc reports in Process Portal

Viewing scoreboards

From Lombardi Process Portal, you can view the standard out of the box scoreboards as well as custom reports and scoreboards created using Lombardi performance data.

See the Reporting section of *Lombardi Authoring Environment User Guide* to learn how to:

- Configure Lombardi to display the standard out of the box scoreboards in the Process Portal.

- Create custom reports using tracked performance data.

The standard Lombardi scoreboards include:

Scorebord	Beschrijving
Mijn performance	Shows the current status of your Lombardi tasks for either a specific Lombardi group, or all the groups of which you are a member. You can also choose a specific business process to analyze or view data for all the processes in which you participate.
Mijn teamperformance	Shows the current status of the Lombardi tasks for Lombardi groups for which you are designated as a team manager.
Procesperformance	Shows the current status of the active instances of particular processes in your organization. The specific processes that are included in the Process Performance scoreboard can be configured as explained in the Reporting section of *Lombardi Authoring Environment User Guide*.
SLA-overzicht	If SLAs have been defined, the SLA Overview scoreboard displays a table that lists the name, description, and current status of particular SLAs. The specific SLAs that are included in the SLA Overview scoreboard can be configured as explained in the Reporting section of *Lombardi Authoring Environment User Guide*.

 To learn how to configure the standard out of the box scoreboards so that they include the information you want and are exposed to the appropriate groups of users, see *Using out of the box scoreboards* in the Reporting section of *Lombardi Authoring Environment User Guide*.

To view custom scoreboards and the reports that they include, you must be a member of the participant group to whom the scoreboard is exposed.

To view scoreboards:

1. Under **My Scoreboards**, click the name of the scoreboard that you want to view.

> To view scoreboards in Lombardi Process Portal, you must be a member of the participant group to whom the scoreboard is exposed.

2. For the standard scoreboards, you can filter the data displayed as follows:

Mijn performance	To filter the results by the teams that you belong to, use the Team Filter drop-down list. To filter the results by process, use the Process Filter drop-down list.
Mijn teamperformance	To filter the results by the teams that report to you, use the Team Filter drop-down list. To filter the results by process, use the Process Filter drop-down list.
Procesperformance	No filter available in the scoreboard, but you can configure the processes that are included as described in the Reporting section of *Lombardi Authoring Environment User Guide*.
SLA-overzicht	Filter the results by a particular timeframe using the Time drop-down list at the bottom of the scoreboard.

> The filter options for custom scoreboards is determined by the user who creates the custom report as described in *Creating a more advanced custom report* in *Lombardi Authoring Environment User Guide*.

3. When you finish viewing a scoreboard, select the name of another scoreboard under **My Scoreboards** or continue to perform other tasks in Lombardi Process Portal.

Rapportgegevens exporteren

Met Lombardi Process Portal kunt u gegevens van bepaalde scoreborden exporteren als CSV-bestand voor gebruik in externe programma's.

1. Klik onder **Mijn Scoreborden** op de naam van het scorebord van waaruit u gegevens wilt exporteren.

2. Click on one of the report elements, such as one of the slices in a pie chart or a column in a bar chart. If export of data is available for the selected scoreboard, the scoreboard refreshes, displaying the export data icon at the top of the page.

3. Click the export Export icon.

4. From the **Opening reportdata.csv** dialog box, you can open the CSV file or save the file to a destination.

Creating ad-hoc reports in Process Portal

With Lombardi Process Portal you can create customized reports using business variable data from your processes. Using the Ad-Hoc Report option, you can:

- Create and share ad-hoc reports from the Process Portal, without having to first create a report in the Designer in Lombardi Authoring Environment.

- Generate dynamic reports in multiple display formats (pie charts, bar charts, and so on).

- Bind business variable data to chart elements to customize your report displays.

- Export report data to a Microsoft Excel file.

To create a report using the Ad-Hoc Report option in Lombardi Process Portal:

1. Click the **Ad-Hoc Reports** link under **My ScoreBoards** as shown in the following figure.
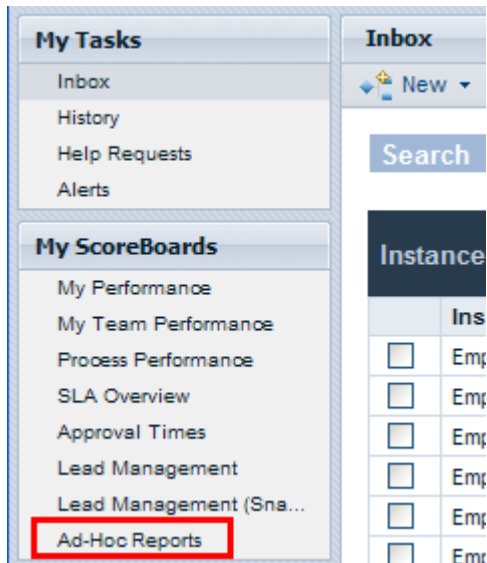
2. In the **Ad-Hoc Reports** page, click the **New Ad-Hoc Report** button, as shown in the following image.

> The **New Ad-Hoc Report** button is available only if you are a member of one or more participant groups to whom a BPD is exposed (`Expose business data` setting). For more information, see *Exposing BPDs* in *Lombardi Authoring Environment User Guide* or online help.

3. From the drop-down list at the top of the page, select the name of the business process definition (BPD) from which to pull data for the report, as shown in the following figure.

4. Choose a **Chart Layout** (for example, bar chart, pie chart, etc.) from the drop-down list under **Chart Preview**.
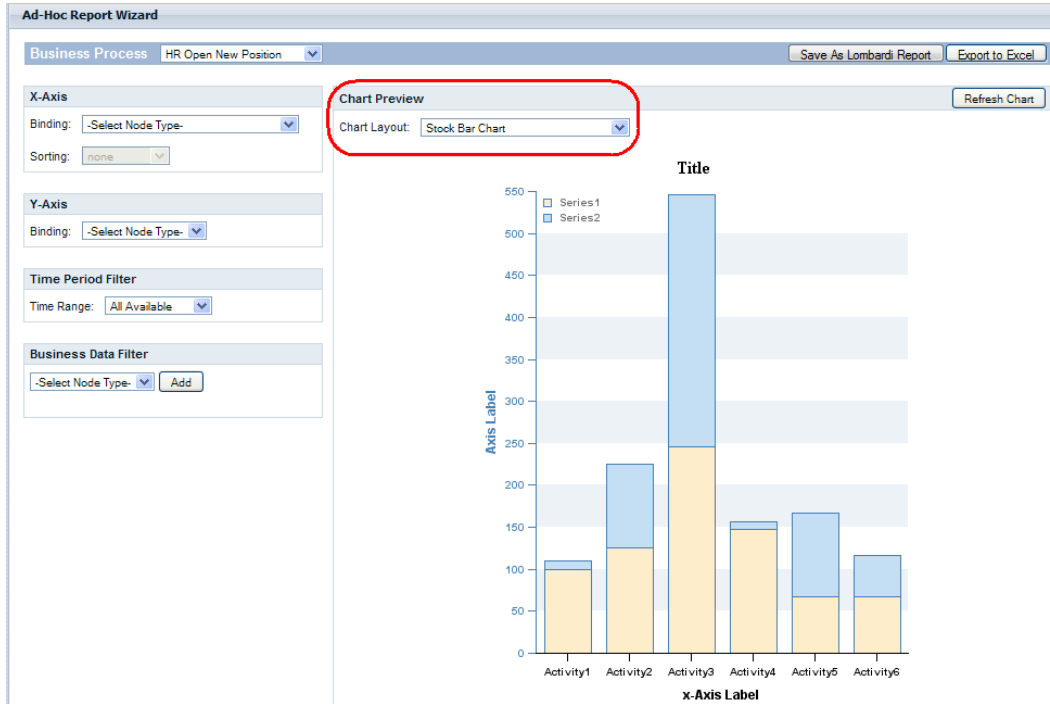
5. To specify which variables will be displayed in a report chart, you must bind variables to the selected chart.

   To bind a variable to an axis, for example, simply select the variable name from the drop-down list, as shown in the following figure. When you select a **Binding** type (for example, Auto-Tracked, Tracking Group, Step Durations, Timing Intervals, etc.), a second drop-down list appears displaying the variables that are associated with the binding type you selected, as shown in the following figure.
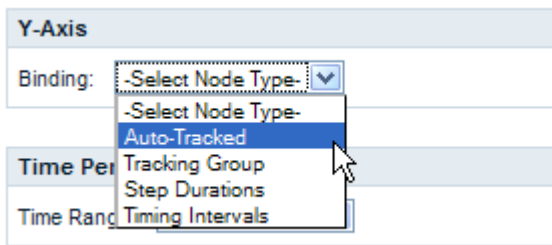
   Only those variables for which Tracking is enabled in the BPD are displayed in the drop-down lists. For example, if you choose **Auto-Tracked** for the Binding and no variables are being tracked in Lombardi Authoring Environment, the Process Portal displays **No tracked items** in the drop-down list. And, some bindings do not appear as options in the Process Portal until they are configured for the selected BPD in Lombardi Authoring Environment and tracked performance data is captured in the Performance Data Warehouse. See the Reporting section in *Lombardi Authoring Environment User Guide* or online help for more information about tracking data and configuring reports.

6. Select the variables to bind to the X-axis and Y-axis of a bar chart, as shown in the following image.

7. Click the **Refresh Chart** button to view the data in the chart preview.

Saving an ad-hoc report in Process Portal

Saving an ad-hoc report in Lombardi Process Portal enables you and other users to view the report at any time.

When you save an ad-hoc report in Lombardi Process Portal, you cannot modify the saved report. Be sure that your report is configured properly before you save it, because you cannot edit the report settings in the Process Portal after saving the report.

To save an ad-hoc report:

1. Click the **Save As Lombardi Report** button, as shown in the following figure.

2. Select the Lombardi security group whose members should be able to view the saved report, type a name for the report in the **Saved Report Details** field, and then click the **Save Report** button, as shown in the following figure.

3. You can view saved reports by clicking Ad-Hoc Reports under My Scoreboards and then selecting the report name from the **Saved Ad-Hoc Reports** drop-down list as shown in the following image.

You can also remove the report by clicking the **Delete Report** button.

Advanced ad-hoc report filtering

When choosing which business variables will be displayed in an ad-hoc report chart, you can customize the following filters to refine the report data:

- Sorting on X-axis

- Functions on Y-axis

- Filter op periode

- Bedrijfsgegevens filteren

Sorting on X-axis

For some business variables you can select a **Sorting** option (for example, Ascending Order or Descending Order) from the drop-down list to determine how data is displayed along the X-axis, as shown in the following figure.

Functions on Y-axis

For some business variables you can select a **Function** option from the drop-down list to determine how data is displayed along the Y-axis, as shown in the following figure:

- **COUNT**: Returns the number of occurrences for the bound variable.

- **SUM**: Returns the total number of all occurrences for the bound variable.

- **AVG**: Returns the average of all occurrences for the bound variable.

- **MIN**: Returns the minimum of all occurrences for the bound variable.

- **MAX**: Returns the maximum of all occurrences for the bound variable.

For Step Durations and Timing Intervals you can optionally convert from milliseconds to seconds, minutes, hours, or days.

Time Period Filter

From the **Time Range** drop-down list, select a relevant time period (for example, Last Year, Current Year, Last Quarter, Current Quarter, etc.) for displaying data in the report chart, as shown in the following figure. You can also use a custom time period with a specific start date and end date. Selecting **Custom Period** from the **Time-Range** drop-down list enables the **Start Date** and **End Date** fields, which are hidden by default. You can either type the start and end dates into the fields directly or click on the calendar icons to select the dates.

Business Data Filter

The Business Data Filter enables you to filter the data for a selected business variable even further by supplying a conditional statement (for example, Equals, Greater Than, Greater Than or Equal To, Less Than, Less Than or Equal To, etc.) related to some specified value, as shown in the following figure. Click the **Add** button to build conditional statements for the report.

Exporting an ad-hoc report to an Excel file

To export the data from an ad-hoc report in Lombardi Process Portal to a Microsoft Excel (.xls) file:

1. Click the **Export to Excel** button, as shown in the following figure.

Ad-Hoc Report Wizard		
Business Process	HR Open New Position ⌄	Save As Lombardi Report Export to Excel

2. Choose whether to open or save the Excel file, as shown in the following figure.

File Download

Do you want to open or save this file?

Name: adhocreport.xls

Type: Microsoft Excel Worksheet, 1.12KB

From: easybpm

[Open]   [Save]   [Cancel]

☑ Always ask before opening this type of file

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?
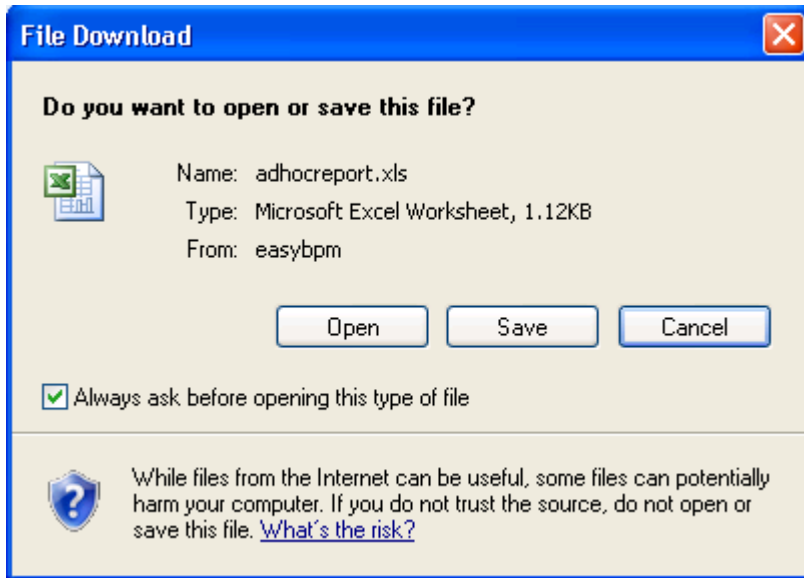
Performing effective searches

You can create and save several types of searches in Process Portal for IBM Websphere Lombardi Edition. For example, you can create and save a search that enables you to view active tasks assigned to members of a particular group. You can also perform a quick search to find process instances by name.

See the following topics to learn more about using the search capabilities in Lombardi Process Portal:

Voor meer informatie...	Zie...
Search both active and inactive process instances for particular process names.	Using quick search
Search across multiple processes and within a parent process and its nested processes for particular business data.	Searching business-variable data
Create custom searches and save them for future use.	Creating a saved search
Share saved searches with other Process Portal users. You must login as a Process Portal administrator to share searches.	Sharing saved searches
Sort the process instances and tasks in the Inbox.	Ordenen van zoekresultaat op taak of instance

Using quick search

To use the Quick Search feature in Lombardi Process Portal:

1. Type a search string in the **Quick Search** field at the top of the page on the right-hand side.

2. Click the **Quick Search** link.

    Quick search locates process instances with names that match the string that you provide. By default, quick search searches all current and past process instances assigned to the current user.

    The Process Portal refreshes, displaying the search results.

Searching business-variable data

When a business analyst or developer creates a process definition in the Designer in Lombardi Authoring Environment, he defines what variables are part of the process, such as customer name, loan amount, or employee skill level. Business data is the run-time manifestation of the variables in a process, i.e. the value of the variables. For example, business data for a process instance might be a loan amount of $500,000.

In Lombardi Process Portal, you can search across multiple processes and within a parent process and its nested processes for particular business data. To search for business data, you must first make the corresponding variables available for search. (For more information, see *Managing and mapping variables* in *Lombardi Authoring Environment User Guide*.)

1. Start Lombardi Process Portal, select **Inbox** or **History** under My Tasks, and click the **Show Search** button:
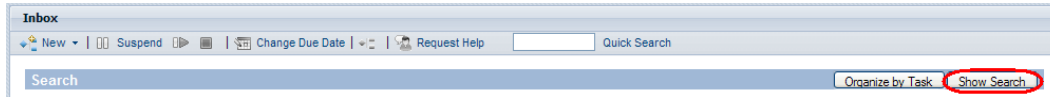
2. Click the **Add New Condition** button.

3. Choose **Business Data** from the first drop-down list displayed for the new condition.

4. From the second drop-down list, choose one of the available variables and then choose an operator and supply a value as shown in the following image:
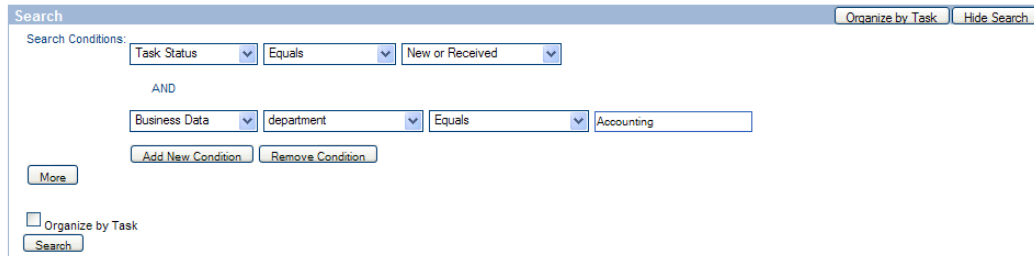
5. Continue to add new conditions as needed.

6. Click the **More** button if you want to choose the columns to display in your search results and the columns to sort on.

    The left text box lists the columns to choose from and the right text box lists the columns that will be displayed in your search results. To add a column, click the name of the column that you want and then click the right-arrow icon. Move a column name from the right to the left to remove that column from the displayed results.

    You can also set the primary and secondary columns by which to sort your search results, as well as specify the sort order for each (ascending or descending).

    To customize the number of **Items Per Page**, select a value (for example, 10, 20, 30, 50, 75, 100).

7. Click the **Search** button to perform the search. The Process Portal displays the search results as shown in the following image:

8. Click the **Show Search** button at the top of the search results to return to the search conditions.

9. Click the **Save Search** button at the bottom of the search conditions to save the search parameters for later use.

10. Type a name for the search in the text box provided and click **OK**.

The search name displays under **My Tasks** and you can click the link to access the saved search at any time.

When you access a saved search, you can click the **Show Search** button to display and revise the search settings. You can click the **Delete Search** button if you decide to delete a saved search.

Searches saved by members of the `tw_portal_admins` security group can be accessed by all other Process Portal users. Otherwise, searches are available only to the user who creates and saves the search.

Creating a saved search

Saved searches can be shared by members of the `tw_portal_admins` security group. Otherwise, searches are available only to the user who creates and saves the search.

To save a search in the Lombardi Process Portal:

1. Start Lombardi Process Portal, select **Inbox** or **History** under My Tasks, and click the **Show Search** button.

2. Set the search conditions. You can create additional search conditions by clicking on the **Add New Condition** button.

3. Click the **More** button to choose the columns to display in the search results. Click a column name under **Choose Columns To Display** and use the right arrow icon to move the column to the box on the right.

You can select multiple contiguous columns by pressing the Shift key, clicking the first in the series, and then clicking the last in the series. To select multiple non-contiguous columns, press the Ctrl key each time you click a column name.

4. Establish the primary and secondary columns by which to sort your results, as well as the sort order.

5. To customize the number of **Items Per Page**, select a value (for example, 10, 20, 30, 50, 75, 100).

6. When you have finished entering your search conditions, click the **Search** button. The Process Portal displays search results like those shown in the following image.

7. Click the **Show Search** button at the top of the search results to return to the search conditions.

8. Click the **Save Search** button at the bottom of the search conditions to save the search parameters for later use.

9. Type a name for the search in the text box provided and click **OK**.

10. The search name displays under **My Tasks** and you can click the link to access the saved search at any time.

    When you access a saved search, you can click the **Show Search** button to display and revise the search settings. You can click the **Delete Search** button if you decide to delete a saved search. Zie Sharing saved searches to learn how Process Portal administrators can share a saved search.

Sharing saved searches

After creating and saving a custom search in Lombardi Process Portal, administrators can share custom searches with other Lombardi users. This enables administrators to create and share searches that may be useful for certain groups or users. When custom searches are shared via Lombardi Process Portal, they are listed under **My Tasks**.

> You must log in to Lombardi Process Portal as `tw_portal_admin` or as a member of the `tw_portal_admins` group to share saved searches. See the *Lombardi Administration Guide* for more information about `tw_portal_admin`.

To share a saved Process Portal search:

1. Create and save a custom search as described in Creating a saved search.

2. Open the saved search by clicking the name of the search under **My Tasks**.

3. Click the **Show Search** button at the top of the search results.

4. Click the **Share this Search** button at the bottom of the search conditions.

5. When prompted, click **OK** to share the search with all other Lombardi Process Portal users.

    When other users log in to Lombardi Process Portal, they can access the search from the link under **My Tasks**.

Ordenen van zoekresultaat op taak of instance

U kunt zoekresultaat als volgt op taak organiseren:

1. In Lombardi Process Portal beeldt u het zoekresultaat af dat u wilt organiseren. U kunt het zoekresultaat afbeelden met de optie **Snel zoeken** of door een opgeslagen zoekopdracht te gebruiken.

2. Klik op de knop **Op taak ordenen** bovenin het zoekresultaat. De pagina van de Process Portal wordt vernieuwd en het zoekresultaat wordt afgebeeld geordend per taak.

> Als u op **Op taak ordenen** klikt, wordt de knop Ordenen op instance actief.

U kunt zoekresultaat als volgt op procesversie organiseren:

1. In Lombardi Process Portal beeldt u het zoekresultaat af dat u wilt organiseren. U kunt het zoekresultaat afbeelden met de optie **Snel zoeken** of door een opgeslagen zoekopdracht te gebruiken.

2. Klik op de knop **Op instance ordenen**. De pagina van de Process Portal wordt vernieuwd en het zoekresultaat wordt afgebeeld geordend per instance.

    Als u op **Ordenen op instance** klikt, wordt de knop Ordenen op taak actief.

Using Critical Path Management features

The critical path analysis tools in Lombardi Process Portal enable you to:

- Determine whether a running process instance is on track for completion.

- Change the due date for a process instance at any time during the life of the instance.

- Adjust the due dates of activities and tasks in a process instance to get the instance back on track.

To use critical path analysis tools in Lombardi Process Portal, you must be a member of the designated user group as described in the *Settings for Critical Path Management* topic in *WebSphere Lombardi Edition Administration Guide.* By default, this user group is `tw_process_owners`.

The following table describes the critical path management tasks that you can complete in Lombardi Process Portal:

Voor meer informatie...	Zie...
Access the Critical Path Management features	Accessing Critical Path Management features
Determine if a running process instance is on track	Checking projected due date
Change the critical path projection	De projectie van het kritieke pad wijzigen
Change a process instance due date based on projections	Changing a process instance due date
Change the priority, duration, or due date for individual tasks or activities	Changing settings for activities
Make bulk changes to process instance values	Making bulk changes to process instance values
Save or revert changes to process instance settings	Saving or reverting changes to process instance values
Run and use the critical path sample process	Running the critical path sample process
Export critical path data to Excel	Exporting critical path data to Excel

Accessing Critical Path Management features

To access the critical path analysis tools for a process instance:

1. From **My Tasks** > **Inbox** click on the name of the process instance that you want to analyze.

2. From the process instance details page, click **Critical Path** on the toolbar as shown in the following image:
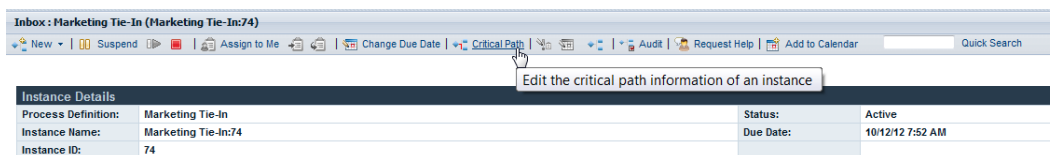
Lombardi Process Portal displays the critical path management information and options for the chosen instance as shown in the following image:

Checking projected due date

When you display the critical path management information for a running process instance, you can see the projected due date displayed in the Instance Details section of the interface. If the date displayed in the Projected Due Date field is later than the date displayed in the Current Due Date field, the current instance is not going to complete on schedule according to the current projection. The default projection for an instance is Pessimistic. To learn more about the available types of projections and how to refine your analysis using those types, see De projectie van het kritieke pad wijzigen.

De projectie van het kritieke pad wijzigen

Er zijn meerdere routes, of paden, die kunnen worden gebruikt voor het voltooien van een proces; de tijd die nodig is om elk pad te voltooien is afhankelijk van de tijd die een gebruiker nodig heeft om elke taak op het pad te voltooien. In het algemeen is het kritieke pad de route waarvan de voltooiing het langst duurt. The time required to complete each path is calculated from the durations and due dates of the tasks in the path.

The Critical Path Management features in Lombardi Process Portal enables you to identify different paths in the process and analyze how long it will take to complete the process using the following projections. To change the projected path for the currently running process instance, select one of the following options from the **Projection** drop-down list:

Projected path	Beschrijving	Data used to calculate
Optimistic	The shortest path a process can take from the current location to the end	The shortest path is calculated using the durations and due dates of each pending activity.
Pessimistic	The longest path (excluding loops) a process can take from the current location to the end	The longest path is calculated using the durations and due dates of each pending activity.
Historical	The most likely path a process would take based on historical data calculated from the current location	Performing a historical projection requires that the process has autotracking enabled and tracking definitions must have been sent to Performance Data Warehouse before instances of the processes started running. See *Tracking Performance Data for the Optimizer* in *Lombardi Authoring Environment User Guide* for more information. Historical projections are not valid if data does not exist in Performance Data Warehouse for the current process.

The durations and due dates for activities are based on the settings made by the process author in Lombardi Authoring Environment. See *Enabling a process for critical path analysis* in *Lombardi Authoring Environment User Guide* for more information. When the projected path is calculated, the overall duration (the time required to get to the end of the running process from the current location) is the most important factor. The optimistic path is not necessarily the path with the fewest activities, and the pessimistic path is not necessarily the path with the most activities.

When you select Historical from the **Projection** drop-down list, an additional **Historical Scenario** drop-down list appears to the right where you can select the scenario to use as the basis for your historical projection. The default scenarios are listed in the following table. If you have created or have access to other historical analysis scenarios (as described in *Creating historical analysis scenarios* in the *Authoring Environment User Guide* or online help), those scenarios are also available for selection.

Historical projection	Beschrijving
This Week	Analysis is performed using historical data for process instances that ran in the current week.
Last Quarter	Analysis is performed using historical data for process instances that ran in the preceding quarter.
All Completed	Analysis is performed using historical data for all previously completed instances of this process.
All Available	Analysis is performed using historical data for all instances, including currently running and all completed instances of this process.
All In-Flight	Analysis is performed using historical data for currently running instances of this process.
This Year	Analysis is performed using historical data for all process instances running or completed in the current year.
This Quarter	Analysis is performed using historical data for all process instances running or completed in the current quarter.
Last Year	Analysis is performed using historical data for process instances that ran in the preceding year.
Last Month	Analysis is performed using historical data for process instances that ran in the preceding month.
This Month	Analysis is performed using historical data for all process instances running or completed in the current month.
Last Week	Analysis is performed using historical data for process instances that ran in the preceding week.

When you change the projection, the Projected Due Date changes in the Instance Details section to show the impact of the projected path on the duration of the entire process. Also, the Critical Path Management section displays the milestones, activities, and tasks that are relevant to the projected path you have selected.

If only one possible path exists in a BPD because there are no decisions or other gateways, the projections for Optimistic and Pessimistic are the same.

To view a graphical representation of the current projected path, click the **Show Process Instance Diagram** button on the toolbar, as shown in the following image:
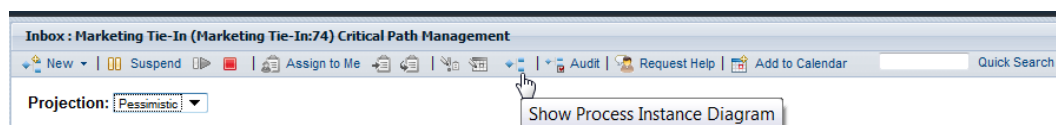
Process Portal displays the process instance diagram in the Flash viewer. The current activity in the running process instance is highlighted in yellow, and the sequence lines for the projected path are highlighted in purple from the current activity to the end of the process. Also, if you have selected a milestone or an activity in the Critical Path Management section, that milestone or activity is highlighted in purple and has a thick black border.

Changing process instance settings

After analyzing the projections for a process instance, you may want to change specific setting such as the due date for the overall instance or the due date for individual activities. The following topics describe the changes you can make to your process instances using the Critical Path Management features in Lombardi Process Portal.

Before you begin the following tasks:

- You must access the Critical Path Management interface in Lombardi Process Portal as described in Accessing Critical Path Management features.

- You should review the information in Viewing milestones, activities, and tasks to be sure that you can view all pending updates caused by any changes that you make.

Changing a process instance due date

In the Instance Details section of the Critical Path interface, you can change the due date of the process instance (the end date for the entire process), as described in the following steps:

1. Enter the new date and time in the **Update Due Date** field. You can either type the date and time or click the calendar icon to the right of the **Update Due Date** field and select a date and time from the calendar.

2. Review the pending changes to the values in the Critical Path Management section.

3. Click the **Save** button to commit the change.

Changing settings for activities

In the Critical Path Management interface in Lombardi Process Portal, you can change the individual values (priority, duration, due date) of activities and tasks in a process instance as described in the follow steps.

1. Type the new value directly into each field that you want to update. When you change a value (such as the duration or the due date) in the **Updates** section, the field is shaded yellow to indicate that it has been changed but not yet saved (it can still be reverted).

   You can change the priority, duration, and due date of an activity or a task. For the due date, you can either type the date and time or click on the calendar icon to the right of the **Due Date** field and select a date and time from the calendar. If you need to refer back to the current values, click the indicator at the top right of the Critical Path Management section to show (or hide) the current values as shown in the following image:

2. In the **Changes** section, review the pending changes to the values. When you change the duration or due date of an activity or active task, WebSphere Lombardi Edition updates the durations and due dates of all subsequent activities and tasks that are affected by the change.

3. Click the **Save** button to commit the changes.

Making bulk changes to process instance values

If you want to change several values simultaneously when performing critical path analysis for a process instance, you can do so quickly using the settings in **Mass Updates**.

1. Choose the settings from the drop-down lists in the **Mass Updates** field to implement the changes that you want. The following table describes the available settings:

If you select...	Then you need to specify...	And then apply the update to...	For...
Resetten naar huidige waarde	Which of the following values you want to reset to the current value: • Duration • Due Date • Priority	Changed values or only critical path values.	Activities, Active Tasks, or Activities and Active Tasks
Duur verlagen met %	The numerical percentage by which you want to decrease the duration	All values, changed values, unchanged values, or only critical path values	Activities, Active Tasks, or Activities and Active Tasks
Decrease Amount	The setting that you want to decrease (duration or due date) and the value for the amount. For the value that you specify, the duration or due date is decreased by that number of days. For example, if you specify 10, the duration or due date is decreased by 10 days.	All values, changed values, unchanged values, or only critical path values	Activities, Active Tasks, or Activities and Active Tasks
Duur verhogen met %	The numerical percentage by which you want to increase the duration	All values, changed values, unchanged values, or only critical path values	Activities, Active Tasks, or Activities and Active Tasks
Increase Amount	The setting that you want to increase (duration or	All values, changed values, unchanged values, or only critical path values	Activities, Active Tasks, or Activities and Active Tasks

If you select...	Then you need to specify...	And then apply the update to...	For...
	due date) and the value for the amount. For the value that you specify, the duration or due date is increased by that number of days. For example, if you specify 10, the duration or due date is increased by 10 days.		
Set Value	The setting that you want to change (duration, due date, or priority), and the value for that setting. For duration and due date, you can specify days. If you specify only a value, the duration or due date is set to that number of days. For example, if you specify only 10, the duration or due date is set to 10 days. For priority, you can choose the new priority from the drop-down list.	All values, changed values, unchanged values, or only critical path values	Activities, Active Tasks, or Activities and Active Tasks

2. Click the **Update Values** button. Changes are applied per the chosen settings. You can see the changes in the Critical Path Management section of the interface.

3. Review the pending changes to the values in the Critical Path Management section. The field for each updated value is shaded yellow to indicate that it has been changed, but not yet saved. When you change the duration or due date of an activity or a task, WebSphere Lombardi Edition accordingly updates the durations and due dates of all subsequent activities and tasks that are affected by the change.

4. Click **Save** to commit the changes.

Saving or reverting changes to process instance values

When you change a value (such as the duration or the due date), each affected field is shaded yellow to indicate that it has been changed but not yet saved. While a pending change is highlighted in yellow, you can choose to either save it or revert it.

If you have pending changes, they will be reverted if you change the critical path projection. If you need to change the projection, do so either before you make changes to process instance values or after you have already saved your changes.

You can revert (undo) pending changes by clicking the **Revert** button. When you click the **Save** button, all pending changes are committed and cannot be reverted.

Viewing milestones, activities, and tasks

The Critical Path Management interface displays the values (priority, duration, and due date) of activities and tasks for the selected process instance. You can click the question mark icon next to the Critical Path Management section of the interface to view or hide the legend, which provides a key for identifying items in the current instance, as shown in the following image. Each milestone may contain one or more activities, and each activity may show one or more generated tasks.
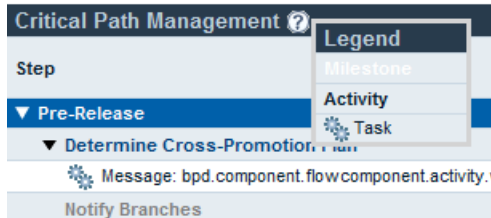
In the preceding image, you can see that the activities are organized per milestone. You can click the indicator next to the name of each milestone to view or hide the activities and tasks in the milestone. Similarly, you can click the indicator next to the name of an activity to view or hide the tasks generated by the activity. (Activities in the BPD generate tasks in running instances of that BPD.) Non-critical activities are grayed out and are hidden by default, whereas critical activities appear in boldface type and are displayed by default. To show (or hide) non-critical activities, click the page icon at the top right of the Critical Path Management section, as shown in the following image:

When editing the durations and due dates of activities and tasks in the Critical Path Management section, the current values for durations and due dates of activities and tasks are hidden by default. If you are making changes to values and you need to refer back to the current values, click the indicator at the top right of the Critical Path Management section to show (or hide) the current values, as shown in the following image:
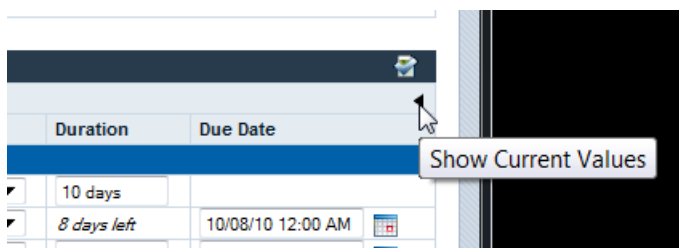
Running the critical path sample process

WebSphere Lombardi Edition includes a sample process called Marketing Tie-In that you can use to experiment with critical path analysis features. Before you can run the sample process and then analyze the process steps in Lombardi Process Portal, the following tasks must be completed:

Taak	Zie...
Import the sample process application: `[Lombardi_home]\imports\critical-path-sample.twx`	*Importing and exporting process applications from the Process Center Console* in *Lombardi Authoring Environment User Guide*
Use the `Expose to start` setting for the Marketing Tie-In BPD to enable Process Portal users to run the sample BPD	*Exposing BPDs* in *Lombardi Authoring Environment User Guide*
Ensure that the Allow Critical Path Management option is enabled	*Enabling the Critical Path Management option* in *Lombardi Authoring Environment User Guide*

To run the Marketing Tie-In sample process:

1. Start the Marketing Tie-In process as described in Starting a new process.

   > To start the sample process, you must be a member of the group to whom the Marketing Tie-In process was exposed (`Expose to start` setting) in Lombardi Authoring Environment.

2. When the Lombardi Coach opens, close out of the Coach and then refresh your Web browser.

3. In your Inbox, you can see the running instance of the Marketing Tie-In process. Click on the instance name.

4. From the process instance details page, click **Critical Path** on the toolbar as shown in the following image:
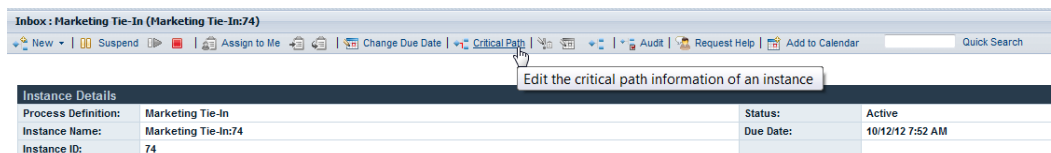
5. Explore each of the options described in Using Critical Path Management features.

The Marketing Tie-In process definition contains three milestones for rolling out a product marketing plan:

- Pre Release

- Release Week

- Post Release

   > To see all milestones, you may have to click the page icon at the top-right of the Critical Path Management section as described in Viewing milestones, activities, and tasks.

The Marketing Tie-In process diagram contains the following critical paths:

- Pessimistic path: This path begins with the Determine Cross-Promotion Plan activity and then flows through the Complex Plan? decision gateway, the Prepare Materials activity, and the Plan Post-Mortem activity.

- Optimistic path: This path also begins with the Determine Cross-Promotion Plan activity and then flows through the Complex Plan? decision gateway. But then it takes a different route through the Notify Branches activity and then the split, followed by the Analyze Demand Impact activity, the Implement Simple National Plan activity, the Roll Back Prices (Always) activity, the join and then the Plan Post-Mortem activity.

It is important to note that when the projected path is calculated, the overall duration (the time required to get to the end of the running process from the current location) is the most important factor. The optimistic path is not necessarily the path with the fewest activities, and the pessimistic path is not necessarily the path with the most activities.

Exporting critical path data to Excel

You can export the raw critical path data from the Critical Path Management interface in Lombardi Process Portal to a Microsoft Excel .csv file as described in the following steps:

1. Click the **Export** option at the top right of the Instance Details section, as shown in the following image:

Instance Details				🖹 Export
Process Definition:	Marketing Tie-In	Current Due Date:	10/12/12 7:52 AM	
Instance Name:	Marketing Tie-In:74	Update Due Date:	10/12/12 7:52 AM	🖩
Instance ID:	74	Projected Due Date:	10/29/10 12:00 AM	
Status:	Active			

2. When prompted by your Web browser, specify a name for the .csv file and then click the **Save** button.

3. Open the .csv file in Microsoft Excel to view the exported data. The .csv file includes the raw data from the Instance Details and Critical Path Management sections in the interface.

Customizing and maintaining Lombardi Process Portal

You can configure Process Portal for IBM Websphere Lombardi Edition in several way to meet the requirements of your users and your environment. See the following topics to learn more about configuring and maintaining Lombardi Process Portal:

Voor meer informatie...	Zie...
Limit access to certain Process Portal functions to specific Lombardi groups.	Restricting access to Process Portal functions
Use services created in Lombardi Authoring Environment to create custom pages.	Creating custom Process Portal pages
View historical changes to tracked variables in a process instance.	Audit uitvoeren op procesgegevens
Change the general Process Portal preferences.	Voorkeuren wijzigen
Customize the Process Portal language settings for each user's locale.	De taal van de Process Portal instellen
Enable automatic login (Single Sign-On) to the Process Portal.	Using Integrated Authentication in Process Portal
Customize skins for Lombardi Process Portal.	Aanpassen van de gebruiksvorm van Lombardi Process Portal

Restricting access to Process Portal functions

If you want to restrict access to particular functions in Lombardi Process Portal, a Lombardi administrator can edit default configuration settings.

When changing a Lombardi configuration setting, you should not change the default settings in each individual configuration file. Instead, you should add the section of the configuration file that you want to change to the `100Custom.xml` file. Lombardi merges the changes that you make in the `100Custom.xml` file with the original configuration, overwriting the defaults. By including your configuration updates in a single file (`100Custom.xml`) you ensure that you are easily able to retain these settings when you upgrade Lombardi. If you are working with Lombardi Process Center Server in your development environment, you can access this file at `[Lombardi_home]/process-center/config`. If you are working in a runtime environment where Lombardi Process Server is installed, you can access this file at `[Lombardi_home]/process-server/config`.

The `99Local.xml` Lombardi configuration file includes the configuration settings that enable you to limit access to certain Process Portal functions, such as changing the due dates of process instances and tasks, to specific Lombardi security groups. If you are working with Lombardi Process Center Server in your development environment, you can access this file at `[Lombardi_home]/process-center/config/system`. If you are working in a runtime environment where Lombardi Process Server is installed, you can access this file at `[Lombardi_home]/process-server/config/system`.

The `<default-action-policy>` section of the `99Local.xml` file enables you to restrict access to Process Portal functions by adding `<role>[security_group_name]</role>` to the action type that you want to limit, as shown in the following example.

The group that you specify must be a Lombardi security group. To learn more about creating and maintaining Lombardi security groups, see *Creating and maintaining groups* in *Lombardi Administration Guide*.

```
<action type="ACTION_REASSIGN_TASK_USER_ROLE">
   <role>project_managers</role>
</action>
```

The following steps describe how to make this configuration change in the `100Custom.xml` without having to modify `99Local.xml`:

1. Stop Lombardi Process Server or Process Center Server.

2. Open the `99Local.xml` and `100Custom.xml` files in a text editor.

3. Copy the portal default action policy section from `99Local.xml` to `100Custom.xml`.

4. For each action that you want to restrict, set the value of the `<role>` element to the appropriate group name as shown in the following example.

   The group that you specify must be a Lombardi security group. To learn more about creating and maintaining Lombardi security groups, see *Creating and maintaining groups* in *Lombardi Administration Guide*.

   ```
   <portal>
      <default-action-policy>
         <action type="ACTION_REASSIGN_TASK_USER_ROLE" merge="replace">
            <role>project_managers</role>
            </action>
      </default-action-policy>
   </portal>
   ```

5. Sla de wijzigingen op.

6. Start Lombardi Process Server or Process Center Server.

The following table lists the functions to which you can restrict access using the configuration settings in `99Local.xml`. Some functions are restricted to the `tw_admins` group by default.

Functie	Beschrijving	Default security group
ACTION_ABORT_INSTANCE	Permanently terminate a process instance as described in Terminating a process instance.	`tw_admins`
ACTION_SUSPEND_INSTANCE	Temporarily deactivate a process instance as described in Suspending a process instance.	`tw_admins`
ACTION_RESUME_INSTANCE	Resume a suspended process instance as described in Resuming a suspended process instance.	`tw_admins`
ACTION_ADD_COMMENT	Add comments to a process instance, as described in Adding a comment to a process instance.	None; available to all users by default
ACTION_ADD_HELP_REQUEST	Request help from other process participants on a process instance or its related tasks as described in Een verzoek om hulp maken.	None; available to all users by default

Functie	Beschrijving	Default security group
ACTION_RESPOND_HELP_REQUEST	Respond to help requests from other process participants as described in Viewing help requests.	None; available to all users by default
ACTION_ASSIGN_TASK	Assign a task to yourself so that only you can run the task as described in Assigning a task to yourself.	None; available to all users by default
ACTION_ASSIGN_AND_RUN_TASK	Run a task that is currently assigned to a group of which you are a member. The task is automatically assigned to you.	None; available to all users by default
ACTION_REASSIGN_TASK	Assign a task to the group to which the task was previously assigned as described in Reassigning a task to a previously assigned group.	None; available to all users by default
ACTION_REASSIGN_TASK_USER_ROLE	Assign a task to a different user or a group as described in Een taak aan een gebruiker of een groep toewijzen.	None; available to all users by default
ACTION_CHANGE_TASK_DUEDATE	Change the due date of a task as described in De vervaldatum van een taak wijzigen.	tw_admins
ACTION_CHANGE_INSTANCE_DUEDATE	Change the due date of a process instance as described in Changing the due date of a process instance.	tw_admins
ACTION_CHANGE_TASK_PRIORITY	Change the priority of a task as needed to escalate or de-escalate the task as described in De prioriteit van een taak wijzigen.	tw_admins
ACTION_MOVE_TOKEN	Advance the execution of a process instance to the next step in the BPD.	tw_admins
ACTION_INJECT_TOKEN	Initiate ad-hoc events as described in Starting ad-hoc processes.	tw_admins
ACTION_VIEW_PROCESS_DIAGRAM	View a process diagram and see the currently executing step for each process instance in your Inbox as described in Viewing process progress.	tw_admins
ACTION_VIEW_PROCESS_AUDIT	View historical data about process variables as described in Audit uitvoeren op procesgegevens.	tw_admins

Creating custom Process Portal pages

Human services that developers create in the Designer in Lombardi Authoring Environment can be exposed as custom Process Portal Pages. To learn more about Human services and how to properly expose them so that they are available as Project Pages in Lombardi Process Portal, see the following topics in *Lombardi Authoring Environment User Guide* or online help:

• Een service maken

• Building a Human service
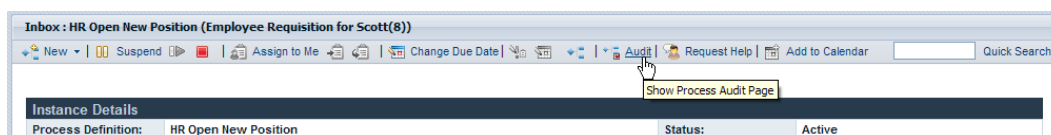
• Een Menselijke service weergeven

A Human service that is exposed as a Project Page is available to members of the selected participant group under the My Projects category. The custom project page has the same name as the exposed service.

Audit uitvoeren op procesgegevens

In Lombardi Process Portal kunt u een audit uitvoeren op bedrijfsgegevens voor procesversies. Let op het volgende voordat u van start gaat:

- Het uitvoeren van audits van procesgegevens is beperkt tot de beveiligingsgroepen die zijn gedefinieerd in het bestand `99Local.xml` in het gedeelte `<action type="ACTION_VIEW_PROCESS_AUDIT">`. De standaardgroep is `tw_admins`. Zie Restricting access to Process Portal functions voor meer informatie.

- You can only audit those variables that have been configured for tracking in the Designer in Lombardi Authoring Environment. To configure tracking, open the BPD in the Designer and go to the **Variables** tab. Select each variable that you want to audit, and then check the **Track This Field** check box under **Performance Tracking**.

1. From **My Tasks** > **Inbox** click on the name of the process instance for which you want to audit data.

2. From the process instance details page, click **Audit** on the toolbar as shown in the following image:

3. You can select business variables from the drop-down list, as shown in the following image:

4. A list of tracked variables for the process appears, showing historical changes for each variable. In the audit report, you can see who made the change, the time of the change, old and new values, and the step or activity in the process at which the change occurred, as shown in the following image:

Voorkeuren wijzigen

U kunt als volgt uw voorkeuren in Lombardi Process Portal wijzigen:

1. Klik op de link **Voorkeuren** rechts bovenin de portal.

2. Om uw e-mailadres te wijzigen, voert u een nieuw e-mailadres in het veld ervoor in.

3. To receive an email each time a task is sent, check the **Receive e-mail on task sent** option.

4. To change the interface language, choose a language from the drop-down list.

5. To show a confirmation window when you run a task and automatically assign it to yourself, check the **Show confirmation window on Assign And Run** option.

6. Click the **Save Changes** button. The preferences page refreshes, displaying your new settings.

De taal van de Process Portal instellen

U kunt als volgt uw favoriete taal instellen voor Lombardi Process Portal:

1. Klik op de link **Voorkeuren** rechts bovenin de portal.

2. In de keuzelijst **Taal van de interface** kiest u uw favoriete taal.

    The language packs selected during WebSphere Lombardi installation establish the languages that are available in this list. The default language is determined using your browser settings.

3. Click the **Save Changes** button. Whenever you log in to the Process Portal, all elements are displayed in your chosen language.

Using Integrated Authentication in Process Portal

Lombardi supports automatic login (often referred to as Single Sign-On, or SSO), which reduces configuration overhead and simplifies the authentication process by using the credentials of the current Windows user to authenticate with Lombardi. This enables Lombardi users to automatically log in to Lombardi Process Portal.

When using Integrated Authentication in Lombardi Process Portal with Internet Explorer:

*   You do not need to log in when you launch Process Portal. A pop-up window appears briefly when you open Process Portal.
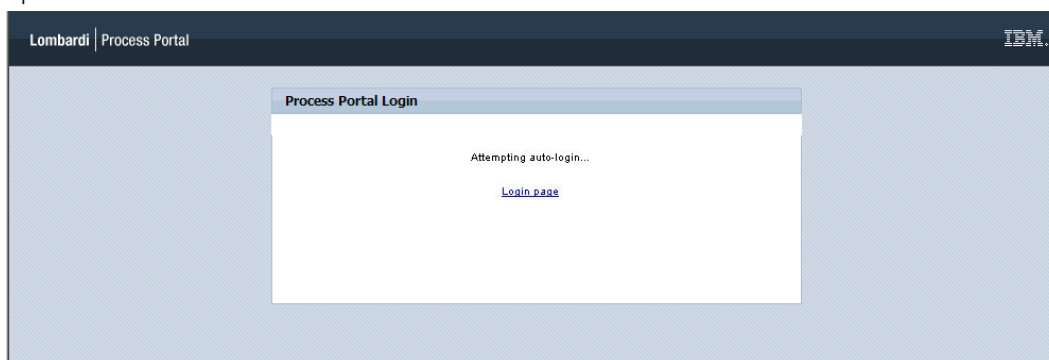
*   When you log out of Process Portal, you can click the **Auto-login using my Windows credentials** link to log on again.
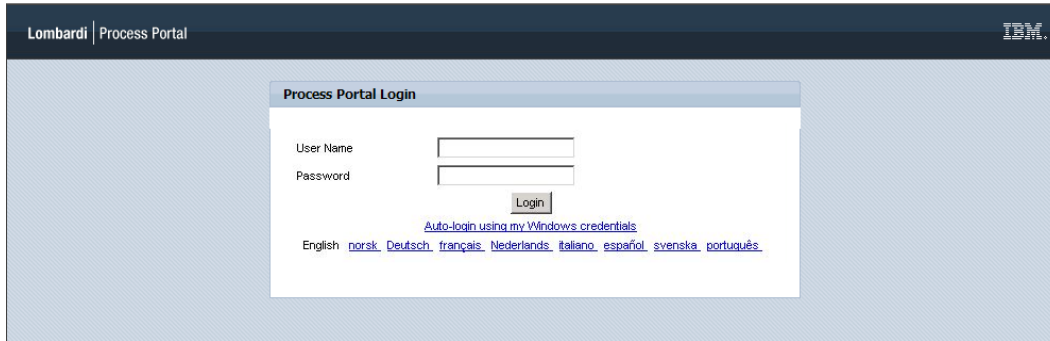
You will not see these screens if you are using a browser other than Internet Explorer.

Aanpassen van de gebruiksvorm van Lombardi Process Portal

Het ontwerp van Lombardi Process Portal wordt bestuurd door CSS-bestanden (Cascading Style Sheet) die zijn samengevoegd in een uiterlijk. U kunt een aangepast uiterlijk maken en gebruiken als u de manier van gebruik van Lombardi Process Portal wilt afstemmen op uw eigen bedrijfsstijl.

Volg de onderstaande stappen om een aangepast uiterlijk als standaard uiterlijk te gaan gebruiken:

1. Maak een backup van het aanwezige `portal.war`-bestand en sluit de Lombardi-servers daarna af. Het bestand `portal.war` bevindt zich in de directory `[Lombardi_home]/[process-center|process-server]/portal-app`.

2. Zoek het standaard uiterlijk op in `[Lombardi_home]/[process-center|process-server]/portal-app/portal.war/skins/Leapfrog`.

   Vorige standaard uiterlijken zijn beschikbaar in de directory's `Default` en `Gray` in `[Lombardi_home]/[process-center|process-server]/portal-app/portal.war/skins`.

3. Maak een kopie van de directory `Leapfrog`.

4. Customize the images and CSS files within the copied directory as needed.

   Ensure the original `Leapfrog` skins directory remains in tact and only make changes in the copy.

5. Save your changes to the CSS files and images.

6. Copy the `portal-theme` tag from the `[Lombardi_home]/[process-center|process-server]/config/system/99Local.xml` file to the `[Lombardi_home]/[process-center|process-server]/config/100Custom.xml` file.

7. Change the `portal-theme` tag to match the directory name that contains the new custom skin and save your changes.

For example, if you simply want to change to the previous default skin, you can set the tag as follows:
`<portal-theme>Default</portal-theme>`

8. Run `[Lombardi_home]/[process-center|process-server]/portal-app/redeploy-portal [.cmd or .sh]`

9. Restart Lombardi servers and start Lombardi Process Portal as described in Starting Lombardi Process Portal to see your new design.

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