@enterprise 8.0

User Manual

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Overview

This manual describes the workflow management system **@enterprise**. It aims at users who want to use this system in their everyday work. It is written to assist first time users of **@enterprise** as well as to act as a reference book for everyday work with the system.

The manual consists of the following chapters:

- The first chapter presents the fundamental terms of workflow management. It also outlines the purpose of the system **@enterprise**.
- The second chapter contains a general system description. It puts emphasize on working with a WWW (World Wide Web)-browser. This chapter is a simple instruction manual for your first steps with the system and shows fundamental concepts in **@enterprise**.
- The third chapter is a detailed description of the worklist - the central component for the everyday use of **@enterprise**.
- The fourth chapter addresses the handling of documents and notes.
- The fifth chapter is about the integrated calendar.
- The sixth chapter describes the mail-client of **@enterprise**.
- The seventh chapter explains the search component of **@enterprise** which helps you to extract useful information about your processes.
- The eight chapter describes the extras component of **@enterprise**. It covers for instance the change of user preferences.

To give you a better orientation in the manual, the icons that are used by **@enterprise** are shown in the margin. The following list shows the icons most frequently used within **@enterprise**:

- **Calendar:** Clicking this icon displays the **@enterprise** calendar. The calendar assists you in entering the date.

- **Functions:** This icon represents functions to a task in **@enterprise**. It appears in the appropriate column of the worklists. Clicking this icon lists the available functions.

- **Document:** This icon signalizes that there are additional documents attached to the task. After clicking this icon, you are usually transferred to the *document management*.

- **Form:** This icon represents a form. The form can be displayed by clicking the icon.

- **Note**: **@enterprise** distinguishes between two types of notes: *global notes* and *private notes*. The icon for global notes acts as a link to the note view in **@enterprise**.

- **Detail view:** This icon is used in the *document management*. Clicking this icon displays properties of a document.

- **Versions of documents:** This icon is also used in the *document management*. It shows that there are different versions of a document available. Clicking this icon lists the different versions of a document.

Throughout the manual an additional **hint** icon is used. If this icon appears in the margin, useful tips will be given. This icon is only used in the manual, but not in **@enterprise**.

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1 Definitions

Some of the definitions may not make much sense to you at the moment, especially if you are new to workflow management systems. In this case just have a glance on the terms and go to the example at the beginning of the next chapter. You can then refer back to this definitions on the ground of an intuitive understanding.

1.1 Workflow Management System

Within a very short time workflow management systems (WFMS) have gained great importance for the design of information and communication systems in organizations.

WFMSs are software systems, which are designed to facilitate, control and monitor business processes – particularly office processes - that are based on division and flow of labor. Hence, WFMSs are systems, which support the handling of processes. The key idea is to forward processes automatically to the appropriate person in charge – (workflow) user or actor – according to predefined procedures – the workflow specification or process description.

Beside the control function, WFMSs offer a series of management functions, which facilitate in particular the monitoring of processes. Typical monitoring functions are:

- Status of a certain process
- Person handling the process at the moment
- People involved in the process so far etc.

1.2 Workflow Specification

A workflow specification is the (formal) description of a business process. In **@enterprise** it can be done graphically or as program code.

A business process consists of a series of partial stages, the tasks, which are connected by diverse control constructs, e.g. sequence, conditions, parallelism etc. Furthermore it describes who (which user) is permitted and able to handle the individual tasks and which data (forms, documents) are exchanged between the tasks.

The specification and the definition of business processes take place at the time of modeling. At runtime the predefined process models serve as templates for concrete workflows. If there is no modeling in advance possible, for instance because the processes are unknown, this operation has to be done at runtime. In this case we call it *ad–hoc* workflow modeling.

1.3 Workflow

A workflow is a concrete operation (also called process or workflow instance or business case), which is based on a particular workflow specification (process description). Workflows are created at runtime when a workflow user selects a particular process (type) and instantiates (starts) it.

1.3.1 Ad–hoc Workflows

Ad–hoc workflows are processes, which are not predefined. They can be initiated and handled by the user at runtime depending on the situation. This is particularly the case if unforeseen situations take place, which the predefined workflow cannot deal with adequately. Ad–hoc elements can also be used to handle special circumstances in a predefined workflow in a flexible manner.

1.4 Task

A task is a step of a process, which is carried out by a certain workflow user (an actor). Each task has a name as well as other additional properties.

Three kinds of tasks can be distinguished:

- **Manual task:** A manual task is an unstructured step of a process whose handling is entirely controlled by the workflow-user, such as the handling of a telephone call or the writing of a letter.

  Standard tools (e.g. word processing programs, spread sheet programs etc.) can be used to carry out the task.

- **Interactive task:** An interactive, automatic task is realized by a specific program (a user application), which is handled by the actor after the start of the task. This program can, for instance, present a form that the user has to fill in.

- **Non–interactive task:** A non-interactive, automatic task (batch task) is a task that is executed automatically and without user interaction by the workflow management system itself.

1.5 Actor

Actors are responsible for the execution of a task. The assignment of the actors to the tasks – mostly indirect through *roles* – is a constituent feature of workflow based process handling. This assignment usually is done along with the definition of new workflow specifications (but ad–hoc workflows can undertake the allocation at runtime).

The modelling and definition of actors are usually carried out in a separate user–modelling component. In **@enterprise** it is done in the system administration component.

In general there are two different types of actors:

- The actor is a person, thus a specific workflow user.
- The actor is a machine, e.g. a computer system, a database management system (DBMS) or a specific program.

1.6 Role

A role is the logical name for a function or position within an organization (e.g. the role *clerk*, the role *sales manager* etc.).

- Roles are necessary in order to determine who are permitted to handle a certain task within a process.

  For example: The logical user for the task *to render account* can be assigned to the role *bookkeeper*.

- A role can be given to many actors and an actor may have various roles.

  For example: Mr. Huber and Ms Mitterer are assigned to the role *bookkeeper*. These two persons then are the possible actors for the task *to render account*.

- Roles are typically assigned in the context of organizational units in order to be able to use a certain role name, e.g. the role *clerk*, in multiple departments without interference.

  Beside clerks in the division *purchase* there are of course also clerks in the division *marketing* or *distribution*.

  Organizational units in **@enterprise** have a hierarchical structure (i.e. an organizational unit can have several subordinated organizational units and at most one direct superordinated organizational unit).

@enterprise offers a flexible concept of roles whereby it distinguishes between the following types of roles:

- **Global roles:** A global role is not assigned to an organizational unit and is particularly used to describe certain skills, e.g. speaks French.
- **Local roles:** A local role is a role that is assigned to one organizational unit and undertakes only jobs within this organizational unit, e.g. the role *secretary*.
- **Hierarchical roles:** A hierarchical role is assigned to a certain organizational unit like a local role but its scope of application is stretched across all subordinated organizational units.

  This is necessary e.g. for managers who should not only be able to handle processes within their organizational unit but also in its subordinated organizational units.

When a user is given a local or hierarchical role, the organizational unit where the role is applicable must be stated, too.

1.7 Form

The exchange of information between tasks or processes takes place through structured HTML–forms as well as through any other documents.

Forms are based on HTML–format (Hyper Text Markup Language) that allows to display them with any WWW–browser.

Forms are structured, i.e. they can contain basic fields for text or numbers as well as complex fields such as tables, links to other forms or program calls.

The particular workflow user can enter values into the fields. All fields within a form can be given an access right. Values of the form fields can also be used in the definition of processes (e.g. to make automated decisions about the next task).

The process definition language supports the simple integration of form fields into the process description.

Besides the HTML–based forms there can be need for any other documents (e.g. a word processing document or a spreadsheet) to handle a workflow. **@enterprise** offers simple integration mechanisms to handle such documents.

1.8 Worklist

Each workflow user who is defined in **@enterprise** gets a worklist (much like an email inbox), which contains various functions in order to handle single tasks. The worklist shows all tasks that are being handled at the moment or have to be handled by the user. Through the worklist the user can access and change attached forms and documents and finish the tasks (send them along their way).

1.9 @enterprise

@enterprise belongs to the most recent generation of workflow management systems and is fully integrated into the internet.

The use of the system is intuitive and clear, which makes the everyday work with the system much easier. The major advantages of using the WFMS **@enterprise** to control business processes are:

- **Specification:** The use of **@enterprise** leads to a better specification of business processes like standard processes as well as less structured or predefined processes.
- **Documentation:** The use of **@enterprise** leads to an accurate documentation of business processes and therefore contributes to the quality management and the process controlling. The analysis of process documentation generated by the workflow system is a substantial base for the improvement of business processes.
- **Turn-around:** **@enterprise** helps to reduce the cycle time within administration to a great extent. Especially transport time and wait time can be reduced substantially.
- **Flexibility:** In contrast to traditional software, **@enterprise** allows changing business processes dynamically and supports exceptional situations in particular.
- **Integration:** **@enterprise** can also serve as a base for the integration of applications into a new overall process structure.

  Specifically this system allows to integrate legacy systems into a new organization of business processes.

2 First Steps

2.1 Simple Example of Use

The following example is taken from the banking industry and illustrates a basic (and simplified) workflow for handling a credit application.

The example shows how the specification of this process can look like in **@enterprise**, how the terms *role* and *organizational units* are applied in **@enterprise**, and which functions are used in interacting with a workflow in **@enterprise**.

2.1.1 Workflow Specification

Process: Credit application

The workflow *credit application* passes through the following steps:

1. If an application is being filed, the bank clerk (role *advisor*) starts the workflow *credit application*.

   This process starts with the task *handle* and is put into the bank clerk's worklist. Attached to the task is the form *application* (a form of the type *credit application*). The data of the customer can be collected and handled electronically with this form.

2. After finishing the task, the process is passed over to the manager of the department (role *manager*). He decides in the task *approve* if a credit is granted or not.

3. An actor of the role *secretary* does the last step. He creates a rejection letter (task *refuse*) or a credit approval letter (task *grant*).

Representation in @enterprise

In **@enterprise** workflows are defined in the system administration. You will find a precise description of the used elements in the system administration manual. The following brief description illustrates the elements of a workflow since we refer to them in some sections (see chapter 3.2.18).

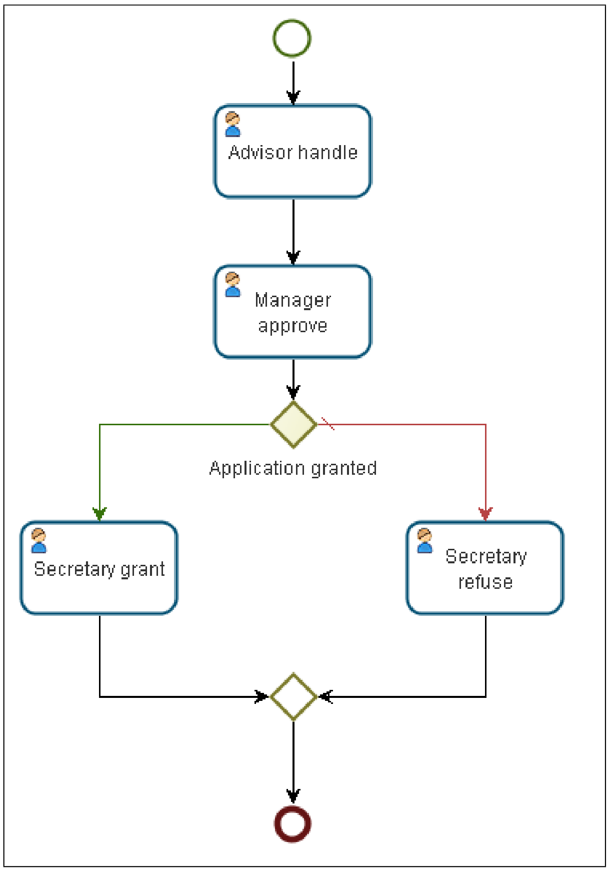


Figure 2.1: **Graphical Representation of the Workflow *Credit Application***

The following elements are used in figure 2.1:

- In **@enterprise** a workflow specification always starts with the element *begin* and finishes with the element *end*. Between these two elements an arbitrary number of tasks or system steps etc. is possible.
- The elements with the user icons represent the tasks. They contain, among others, the name of the step (e.g. *handle*) and its actor (e.g. *advisor*).
- The diamond icon element *application.granted()* represents a condition. The WFMS checks if the application is granted or not. If the application is granted the workflow will go ahead along the green (left) line, if not it will follow the red (right) line.

2.1.2 Organization Chart

The process *credit application* involves multiple organizational units. Figure 2.2 visualizes the relationship between the organization (bank) and the workflow.

The left side of the figure presents the workflow specification. The right side shows the organigram of the bank. The workflow *credit application* can only be started by members

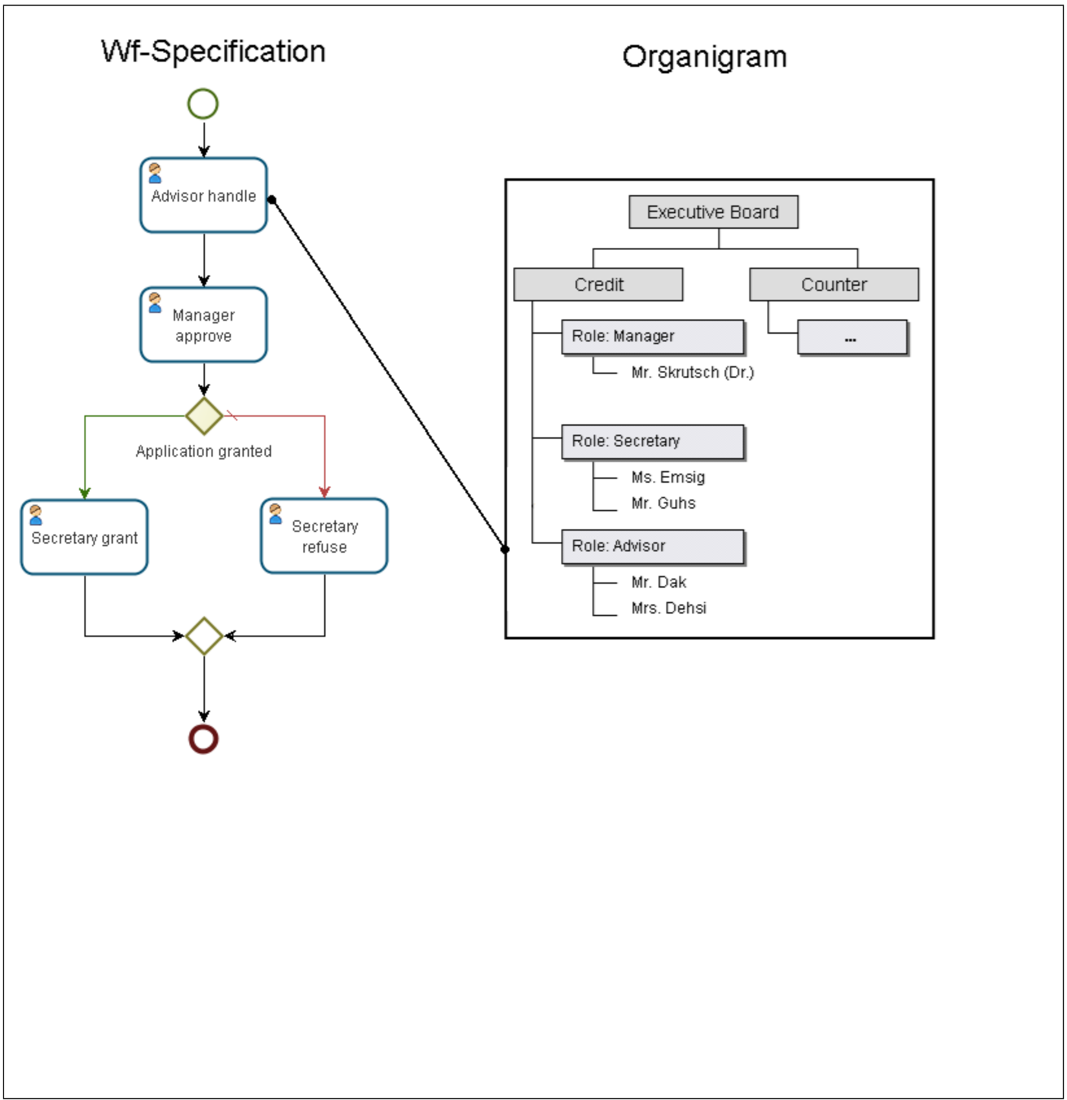


Figure 2.2: **Organizational Chart**

of the role *advisor* of the organizational unit *credit*.

2.1.3 Workflow Execution

The example in figure 2.3 uses the process *credit application* to show the main functions of the execution of a workflow in **@enterprise**.

The workflow *credit application* takes place in the organizational unit *credit*. It involves the roles *advisor*, *manager* and *secretary*.

1. Mr. Dak (role *advisor*) initiates the workflow *credit application*. As a result the first task *handle* of this workflow appears in his worklist.

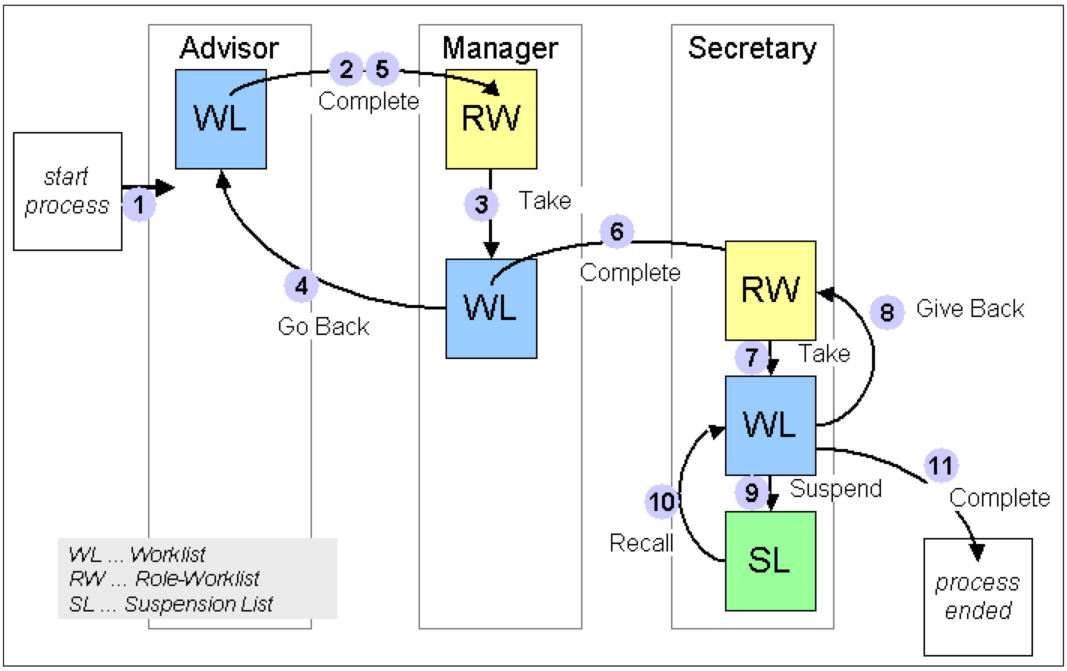


Figure 2.3: **Workflow Execution**

Mr. Dak edits the credit application of his client, fills in the attached forms and might attach additional electronic documents to the process.

2. Once he is done Mr. Dak finishes this step using the function *Complete*. This passes the process on to the next user.

   The next user has been defined in the workflow specification. In this example the process is being forwarded to the role–worklist of the role *manager* in the organizational unit *credit*.

3. Mr. Skrutsch is a member of the role *manager* (see organizational chart) and wants to handle the next workflow step *approve*. Therefore he takes the process from the role–worklist by using the function *Take*. Thus the task appears in his personal worklist.

   Mr. Skrutsch can now grant or refuse the credit application. He has access to all documents, which were filled in or attached by Mr. Dak.

4. Mr. Skrutsch finds out that Mr. Dak forgot to enter important information about the client. He uses the function *Go Back* to return to the previous step in the workflow (step one: *handle*).

5. Mr. Dak once more finds the task *handle* in his worklist but now with the changes and remarks made by Mr. Skrutsch. He fills in the missing form fields and again finishes this task with the function *Complete*.

6. Mr. Skrutsch finds the task *approve* in his role–worklist and takes it. Since all necessary information has been provided, he can decide to grant or refuse the application.

In this example he grants the credit application of the customer. Then he passes on the process to the next user by selecting the function *Complete*.

7. The process appears in the role–worklist of the role *secretary*. Mr. Guhs sees the application and takes the task by activating the function *Take*.

8. Mr. Guhs is being interrupted and recognizes that he doesn't have enough time to handle this task at the moment. He selects the function *Give Back* to put the task back to the role–worklist of the role *secretary*.

   Another secretary, Ms. Emsig, takes the task by using the function *Take* and starts to handle it.

9. Ms. Emsig needs additional information from Mr. Dak to finish this task. She leaves a message for Mr. Dak at his answering machine and puts the task to the suspension–list using the function *Suspend*.

10. After Mr. Dak called back Ms. Emsig takes the task back from the suspension–list by using the function *Recall* and finishes the task.

11. She passes on the process to the next user using the function *Complete*. Since it is the last step in the process *credit application* the workflow is finished (the case is closed).

2.2 *User Interaction in @enterprise*

2.2.1 Web–Browser

The standard user interface of the WFMS **@enterprise** is any World Wide Web (Web) –browser (e.g. Netscape Navigator or Internet Explorer). The Web–browser displays complex information, which is provided by Web–servers.

The handling of your Web–browser is described in the user manual of the particular system. Some general features will be described here too.

2.2.2 Navigation Concept

The concept of hypertext is – from the user's point of view – the primary characteristic of the Web.

The Web–hypertext document can be any complex multimedia document (i.e. it can contain text, images, sound etc.). Additionally it can contain links (hyperlinks). Links are references to other documents or to other locations within the same document. If the user clicks on a link, the linked document will be loaded and displayed in the browser.

@enterprise uses links not only to display specific information but uses them also to initiate operations (function calls).

When you click the workflow specific link, a certain function (i.e. a certain program) will be executed. Usually the function call updates the display as well.

2.2.3 Browsing

The usage of hyperlinks can lead to a situation where you are getting *lost*. To go back to a previously viewed page you can use the browser function *Back* once or multiple times. The complementary browser function *Forward* brings you to pages you just left by using the *Back* function.

This function can be invoked in two ways:

- Using the *Back* function in the tool bar of your browser.
- Using the right mouse button opens a context menu window, which contains the *Back* function.

2.2.4 Date Entry

The standard date format is: DD–MM–YYYY (day–month–year), for example: 10–12–2001.

Hint: The date format can be configured at the system installation (see installation manual) and in the system administration (see system administration manual).

Calendar

@enterprise provides a date entry assistant. You will find the calendar icon beside every date field.

Pressing the icon a new window containing a calendar will appear (see figure 2.4). Here you can select any date and it will be copied into the date field in the correct format.

The calendar window contains four areas. On top the current month and year are displayed. On the left side the help link *?* shows a description of using the calendar. On the right side there is the close button *X*. The second area contains a month- and years-selection. The link *Today* shows the current day. At the third area it is possible to set the starting day of the week by clicking on the weekday (e.g. Su for Sunday). By selecting a day (e.g. 23) the 23. day of the selected month is accepted. At the bottom you can set the time, either by several clicks on the hour- or minutes-field or by clicking on the hour- or minutes-field - hold left mouse button pressed - and moving the mouse to left or right side.

Detailed description of the calendar features:
Saturdays and Sundays are printed in *red*, the current day is printed in *blue*, and all other days are displayed in *black*.
Clicking on the day of the calendar closes the assistant and copies the selected date into the date field.
Selecting the button *Close* cancels the operation. The calendar is being closed and the date field stays unchanged.

Figure 2.4: **Calendar**

2.2.5 Status Messages

The browser shows status messages in the status bar at the bottom of the window. It displays information like the address of a specific link or if the actual page is still loading.

2.2.6 Error Messages

If errors occur (e.g. invalid entries or execution errors) an error message including a *Back*–button will be displayed.

2.2.7 Common Functions

New / Add

If you click this button a dialog for creating of a new entry for this field becomes displayed. If this button is located next to a table, a table entry has to be selected at first.

Edit

If you click this button a dialog for editing the field next to this button becomes displayed. If this button is located next to a table, a table entry has to be selected at first.

Remove

If you click this button the content of the field next to it will be deleted. If this button is located next to a table, a table entry has to be selected at first.

Delete

If you click *Delete* the currently edited object will be deleted. This button is available only if you are in the detail view of an object.

Select all

If you select this checkbox next to the corresponding table all table entries become selected.

View

If you click this button detail informations for the field next to it become displayed. If this button is located next to a table, a table entry has to be selected at first.

Select

If you click this button a dialog will be displayed which helps you to select an entry for the corresponding field.

Since @*enterprise* version 8.0 drop-down lists are integrated additionally. By activating this symbol, the content of the list is displayed, where you can select the needed object.

OK

If you click this button all of your entries will be stored and the current dialog will be closed.

Apply

If you click this button all of your entries will be stored and the current dialog will remain opened.

Cancel / Back

If you click this button all of your entries will be ignored and the current dialog will be closed.

2.3 Logging on to @enterprise

In order to work with **@enterprise** at first you need to start a WWW–browser.

After starting the browser there are three ways to get to the **@enterprise** login window.

- Your browser is configured to start up with the **@enterprise** login window.
- You load the **@enterprise** login window yourself by selecting the menu item **@enterprise** from your bookmarks menu (*Favorites*).
- You load the **@enterprise** login window yourself by entering the URL, which you have got from your system administrator.

Figure 2.5: **Login Window**

2.3.1 Login Window

The login window (see figure 2.5) is used to enter your identification data which consist of two values:

- **User–Id:** Here you enter your user identification (e.g. name, number etc.).
- **Password:** After entering your user identification you have to enter your personal password. This character combination is only known by you and the system. It ensures that only authorized users can access the system.

You confirm your input by activating the button *Logon*. The WFMS checks the entered data. If the data is correct the **@enterprise** main window will be opened. Otherwise you get an error message (see figure 2.6) and you have to reenter your data.

2.3.2 Main Window

After the successful login, the **@enterprise** main window will be loaded. This window contains among others your personal worklist with functions you need to handle the workflows (of the various processes). The different components of the main window will be described in detail in chapter 2.4.

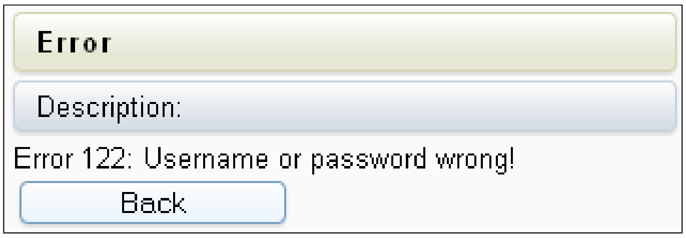


Figure 2.6: **Incorrect Login**

2.4 *@enterprise User Interface*

This chapter is a general introduction to the user interface of **@enterprise** and its main components.

2.4.1 Layout of the User Interface

The user interface consists of three areas: toolbar, navigation area, and work area (see figure 2.7).

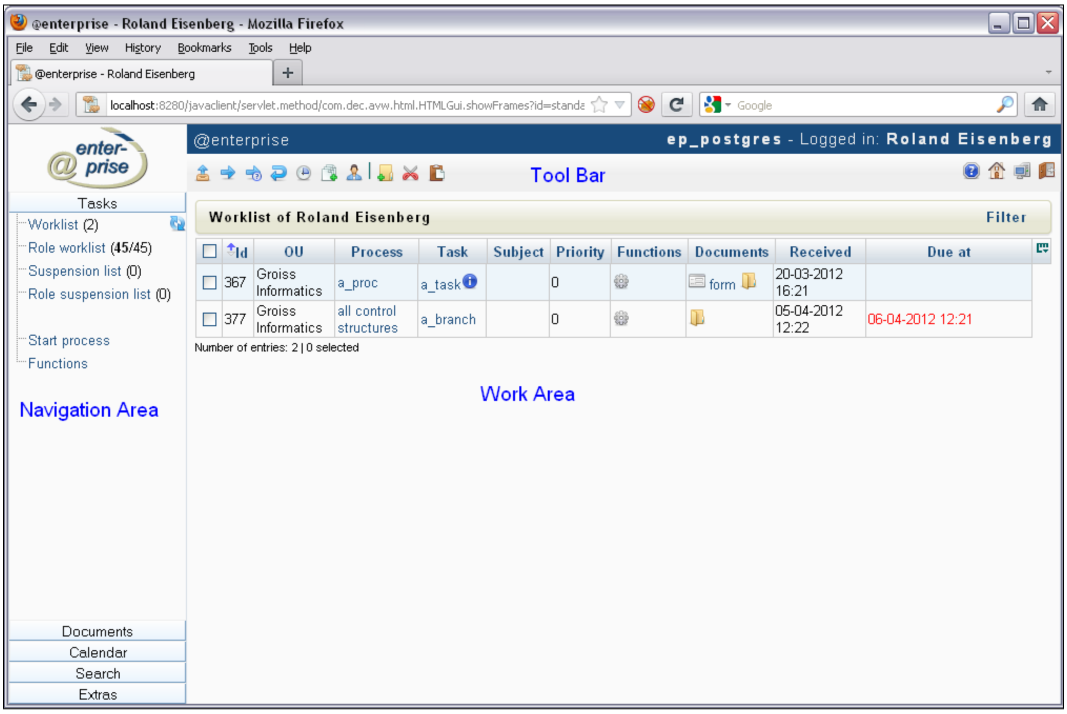


Figure 2.7: **Design of the User Interface**

- **Tool Bar:** The tool bar contains functions that can be applied to entries in the work area. It is also possible that there are no functions available in the tool bar.

- **Navigation Area:** In the left part of the window the navigation area is displayed. It contains the groups *Tasks, Documents, Calendar, Search* and *Extras*. Each group comprises components which belong together logically.
- **Work Area:** The work area is the main area in the **@enterprise** user interface. Here the content of the actually selected entry of the navigation area is displayed. The layout of the work area can vary quite substantially with the specific content, and therefore relevant information can be found in the appropriate chapters.

The Toolbar

The toolbar contains functions that can be applied to entries in the work area.

To apply a function, first select one or several entries in the work area and then click on the corresponding icon at the toolbar. The function will be executed immediately except if the function needs additional information. In this case an HTML–form will be displayed in the work area where you can enter the necessary data.

The list of functions (icons) displayed in the toolbar depends on the selected entry in the navigation area, at some screens the toolbar can even be empty. You will find the relevant information in the appropriate chapters (see chapter 3).

Navigation area

The navigation area consists of different groups that determine the content of your work area. These groups are topics for the links inside. Activating an entry in the navigation area will change the content of the work area.
You will find a brief description of the entries and the links below. A more detailed description can be found in the corresponding chapters.

- **Tasks:** In this group you can find the following links:
  - *Worklist:* This link opens your personal worklist. It is the central component in your daily work with **@enterprise**.

    The worklist symbolizes the desk or the in–tray of the user respectively. All tasks that have to be done by a certain user are displayed in his worklist.
  - *Role worklist:* This link opens your role worklist. It shows all tasks, which have been assigned to one of your roles.
  - *Suspension list:* The suspension list shows all suspended tasks.
  - *Start process:* This link offers you the opportunity to start a new process.
  - *Functions:* This link opens a list of function names. These functions can be called by you directly.
- **Documents:** This group comprises links belonging to the document management system of **@enterprise** (see chapter 4).The document management of **@enterprise**

supports the handling of documents that have been attached to a task and a process respectively. Of course it is also possible to handle documents that are neither attached to a task nor to a process.

This group contains the following two links:

  - *Personal folder:* This link opens a folder containing the personal documents of the current user. In the navigation area you won't find the entry *Personal folder* but its labeled with the name of the current user e.g. *John Smith*.
  - *Common:* This link opens a folder containing those documents that are shared by all users.

- **Calendar:** This group contains a calendar for managing private and public appointments. It is also possible to manage resources (like video projectors, rooms, etc.) which can be attached to appointments.

- **Search:** This group refers to the search component (see chapter 7) and consists of:

  - *Process search:* This function allows you to find process instances by using simple constraints.
  - *Document search:* This function allows you to find documents of the document management by using simple constraints.
  - *Extended search:* This function offers extended functionality for finding process instances. This entry only appears if you have the right for doing an extended search.
  - *Stored queries:* This function contains predefined search queries to locate processes.

- **Extras:** This group allows you to gain information about roles and organizational units as well as to carry out small administrative tasks such as defining a substitute, setting the homepage, etc. Here you can find the following links:

  - *Settings:* Here you can view and change user specific settings.
  - *Dashboard:* With this link the dashboard of **@enterprise** will be displayed in the work area. The content of the dashboard can be defined by the user.
  - *Set password:* This function allows you to change your **@enterprise** access password.

    Hint: This password is not being used in every configuration of **@enterprise**. If your system, for instance, is configured to identify you by verifying a chip card, the update of the password has no effect.
  - *Roles:* This function gives three informations to you:
    - All roles which are assigned to you.
    - Which people act as a role–substitute for you.
    - Whom you are substituting in certain roles.

- *Substitutions:* It shows which people act as a personal substitute for you as well as for whom you are substituting personally. The settings can be changed here as well.
- *Organization:* This link shows the structure of your organization.
- *Page as Home:* It is possible to define a home page for **@enterprise**. This function sets the current page as home page for **@enterprise**.
- *Password policy:* This function gives an overview of the current password policy and informs the user about incorrect login attempts with his user account since the last login.
- *Style configurator:* With the help of the style–configurator you are able to adapt the look and feel of **@enterprise** to your needs.

The Work Area

The work area is the main area in the **@enterprise** user interface. Here the content of the actually selected entry of the navigation area is displayed. The layout of the work area can vary quite substantially with the specific content, and therefore relevant information can be found in the appropriate chapters.

Column picker, Sorting and Filter

You can change the number of displayed columns by using the column picker. The column picker is placed rightmost of the table header. Activate the functions and a popup-window containing the names of all actually visible and possible columns opens.

Already visible columns are displayed with a small check-mark. To add a new column to the table, activate a column name (without the check-mark). The table refreshes and the selected column is displayed. To remove a column from the table, activate a column name (with the check-mark). The table refreshes without the removed column.

You can change the sorting column and sorting direction by activating a column header. Which column and direction is actually used for sorting is marked by a small arrow left of the column name.

The link *Filter* helps you to keep an overview if your table contains a lot of entries. The filter can be seen as selection criteria to mask certain entries in your table.

By clicking on the corresponding column header of your table a context sensitive filter menu with the following entries is shown:

- Order ascending: The entries of the table are ordered in ascending order by the current column.
- Order descending: The entries of the table are ordered in descending order by the current column.
- All entries: The use of the column filter of the current column becomes nullified.

- User Defined: By selecting this menu item a HTML–page is shown where you can enter a certain value. If you confirm your entries in this page by clicking the button ”OK” the table is filtered by the corresponding value.
- The first 20 different column entries; if you select one of these entries the column becomes sorted by this entry.

If you want to save the current combination of filters you have to click the link *Filter* in the heading of the table. The filter menu is shown:

- Save filter: By selecting this menu item you save the current combination of column filters under a name defined by you. You can also enter a description for the filter.
- Edit filter: By selecting this menu item you get a list of these filters where the user has the *view* right. This mask allows to edit or delete filters. By selecting a filter and activating the toolbar-function *Edit*, columns can be added, edited and removed from the filter. It is also possible to set permissions (tab *Access*), which allow other users to use this filter (right *Share*).
- A list of all saved filters. If you select one of these entries the table is filtered by this filter. The list can also contain filter which have been defined by the system administrator. These filters can only be used but not deleted by you.
- All entries: The use of the saved filter is nullified.

When a filter is selected only those entries of the table are displayed which match all the criteria specified by the filter (e.g. received during the last three days and either in task *grant* or *refuse*).

3 The Group Tasks

The group *Tasks* comprises your personal worklist, your role worklist, your suspension list, the role suspension list, the function list and a possibility to start new processes.

In order to handle the content of the different entries of this group you can use functions and links displayed within your work area or in the toolbar.

3.1 Links of the Group "Tasks"

3.1.1 Worklist, Role worklist, Suspension list and Role suspension list

The worklist is the central component for the **@enterprise** user. The worklist symbolizes the desk or the in–tray of the user respectively. All *tasks* that have to be carried out by you are displayed in your worklist.

@enterprise distinguishes four types of worklists: your personal worklist, your role worklist, your suspension list and your role suspension list. You can select the various worklists through the entries in the navigation area.

Structure of the worklist

The personal worklist, the role worklist, the suspension list and the role suspension list are structured in the same way. In the personal worklist you have the possibility creating subfolders for customizing your worklist (see chapter 3.2.8).

The worklists are shown as a table (see figure 3.1). The header of the table shows the type of the worklist (i.e. *Worklist*, *Role worklist* or *Suspension list*) and your name along with a link to the stored filters (see chapter 2.4.1) for the worklists.

Each row in your worklist represents one entry. These entries correspond to the tasks you have to accomplish. Tasks printed in **bold** face are new entries that have not been handled so far.
If there are a lot of items in your worklist it may be hard to keep track of. Therefore a paging mechanism is offered (must be activated by the system administrator) which enables you to specify how many entries are displayed in your worklist at once. For more details see chapter 8.2.3.

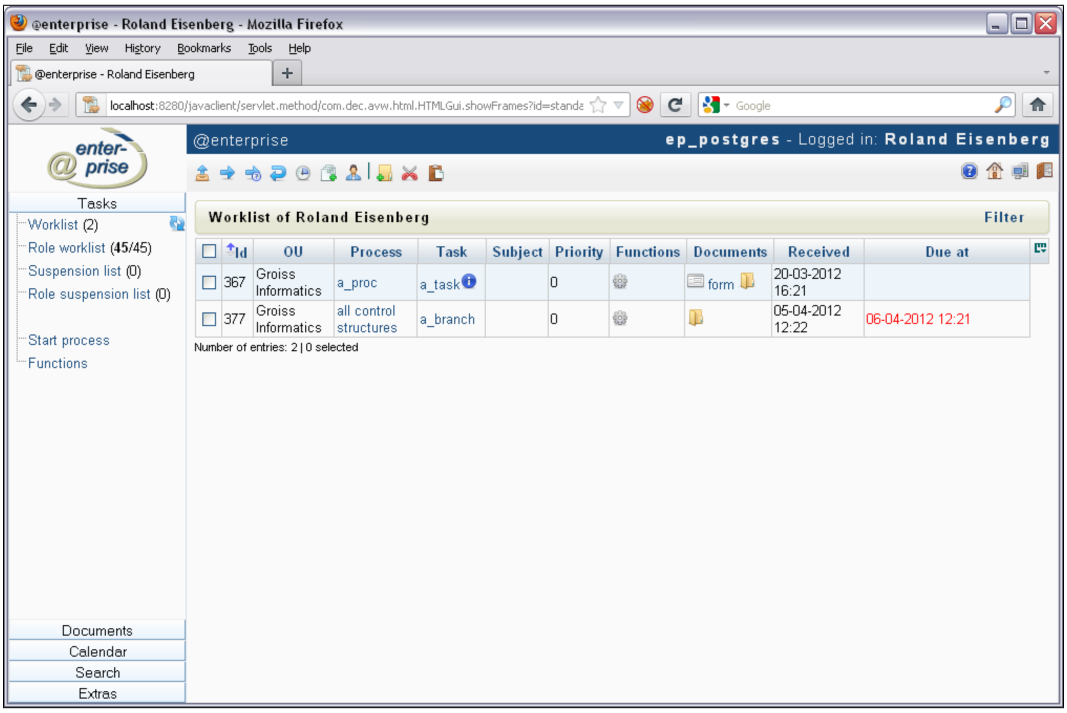


Figure 3.1: **Structure of the Worklist**

Columns of the worklist:
The columns of the worklist contain the various functions and information of the listed tasks. Below you will find a detailed description of these functions and information.

- Selection column: used to select one or more of the entries.
- **Role:** This column only exists in the role worklist and role suspension list and contains the name of the role this task has been assigned to.
- **Id:** The Id is the unique identifier of the process instance to which the task belongs. This identifier can be a number or a text.
- **OU (Organizational Unit):** Shows the actual organizational unit of the task.
- **Process:** Displays the name of the process to which the task belongs. The name of the process is a link to the *process history* (see chapter 3.2.18).
- **Task:** This column contains the name of the actual task. The name of the task is a link to the *task description* (see chapter 3.2.18).
- **Subject:** If a subject has been specified at the process definition it will appear here.
- **Priority:** This column contains the priority of a process relating to the current task.
- **Functions:** This column has no header and contains a link to additional functions that may have been associated with this task (see chapter 3.2.21). The function symbol is a link to these functions.

- **Documents:** Every task can have several *forms*, *documents* etc. attached to it. The documents are represented by different symbols in this column. The symbols can be used to edit these documents.

- **Received:** The date shown in this column represents the date on which the task arrived at the worklist.

- **Due at:** Here you will find the due–date of this task (or process). This column can be empty.

  The date is color coded to indicate the urgency of the process.

  - *Red:* The task (or the process respectively) should have been done by now (the due–date is in the past).
  - *Orange:* The task (or the process respectively) has to be accomplished today.
  - *Black:* This task is not urgent at the moment.

- **Suspended until:** This column only exists in the suspension list and shows until which point in time a task is being suspended.

3.1.2 Function list

The function list shows all functions, which you can invoke.

You reach the function list by activating the homonymous link in the group *Tasks* of the navigation area.

Structure of the *Function list*

The function list contains the name and the description of every function. Furthermore it is possible to classify functions in so-called *Function groups* (see System Administration). If a function is not assigned to a group, it will be assigned beneath to a group without name (see figure 3.2).

Columns of the function list:

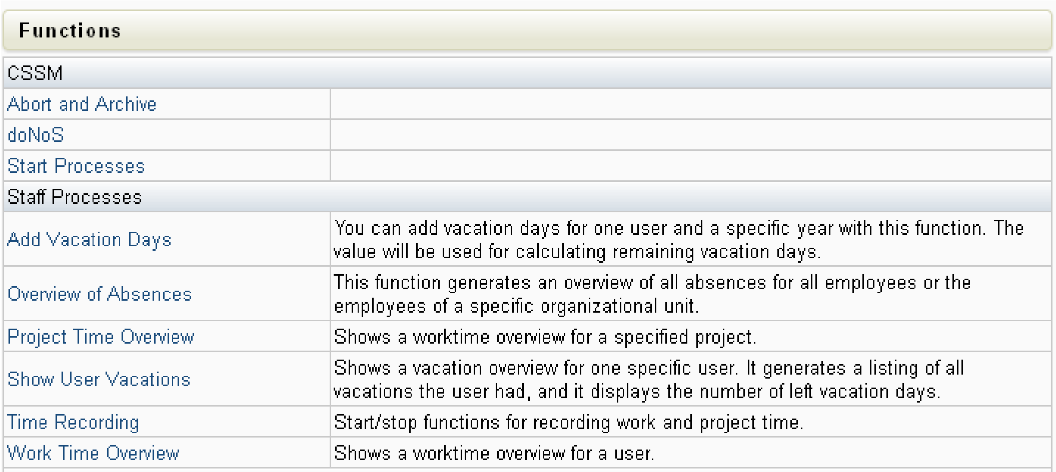
- **Name:** This column lists the name of the function. The name is also a link that can be used to invoke this function.

- **Description:** If an additional description for a function is available, it will be shown in this column.

@enterprise Functions

By default **@enterprise** offers the following functions:

- **Process note:** This function is used to attach a note to an existing process. Beneath you find an example for the usage of this function.



Functions	
CSSM	
Abort and Archive	
doNoS	
Start Processes	
Staff Processes	
Add Vacation Days	You can add vacation days for one user and a specific year with this function. The value will be used for calculating remaining vacation days.
Overview of Absences	This function generates an overview of all absences for all employees or the employees of a specific organizational unit.
Project Time Overview	Shows a worktime overview for a specified project.
Show User Vacations	Shows a vacation overview for one specific user. It generates a listing of all vacations the user had, and it displays the number of left vacation days.
Time Recording	Start/stop functions for recording work and project time.
Work Time Overview	Shows a worktime overview for a user.

Figure 3.2: **Function list**

- **Change private key password:** If your system uses the default implementation for electronic signatures of **@enterprise** you have to enter a password when you generate the keys required for the signature process. So if you electronically sign a document you have to enter this password. The function *Change private key password* enables you to change your password for electronically signatures.
- **Generate keys:** If your system uses the default implementation for electronic signatures of **@enterprise** you have to generate a private/public key pair so that you can electronically sign documents. The function *Generate keys* generates the required key pair for you.

Example

1. Click on the name of the entry *Process Note* in the function list. The HTML–page *Attach note* appears in the work area (see figure 3.3).

Hint: You reach the *function list* via the link *Functions* in the appropriate group of the navigation area.

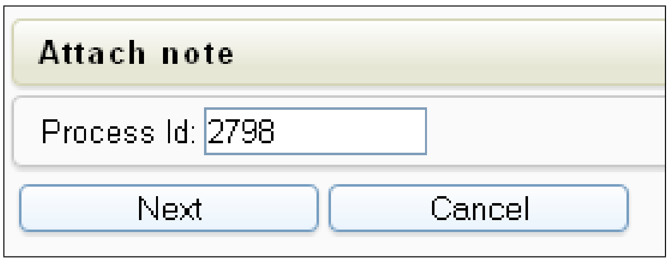


Figure 3.3: **Attach Note**

2. Enter the Id of the already running process in the field *Process–Id*.

3. After activating the button *Next*, the specified process will be located. If the Id is valid, the note form appears in your work area (see figure 3.4).

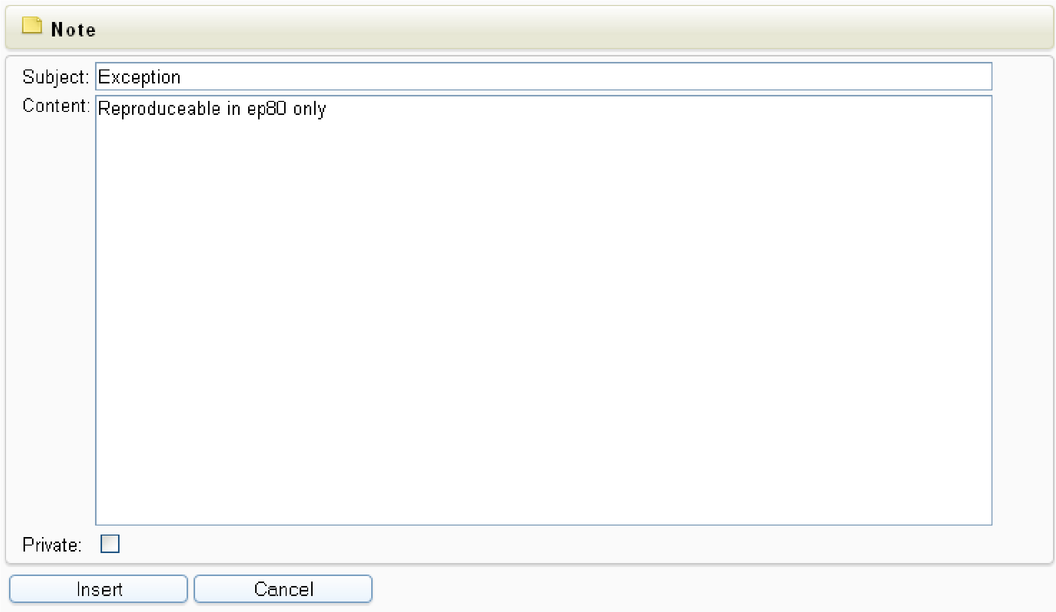


Figure 3.4: **Note Form**

4. Enter any information into the note form.

5. Confirm your entries by activating the *Insert* button. Your note will be attached to the previously selected process. The note symbol appears in the column *Documents* of the according task. You will be transferred to the function list.

3.1.3 Start process

The process list shows all processes you are able to start. You can start all those processes in which you are entitled to handle the first task (e.g. because you are a member of the role associated with the first task).

To display the list of processes click the link *Start process* in the group *Tasks* of the navigation area.

Structure of the process list

Processes in **@enterprise** are displayed in a list called process list. The entries show the name, version and the description of a process (see figure 3.5). The dropdown-list contains all @enterprise applications. If you select a application, the processes of the selected application will be displayed only.

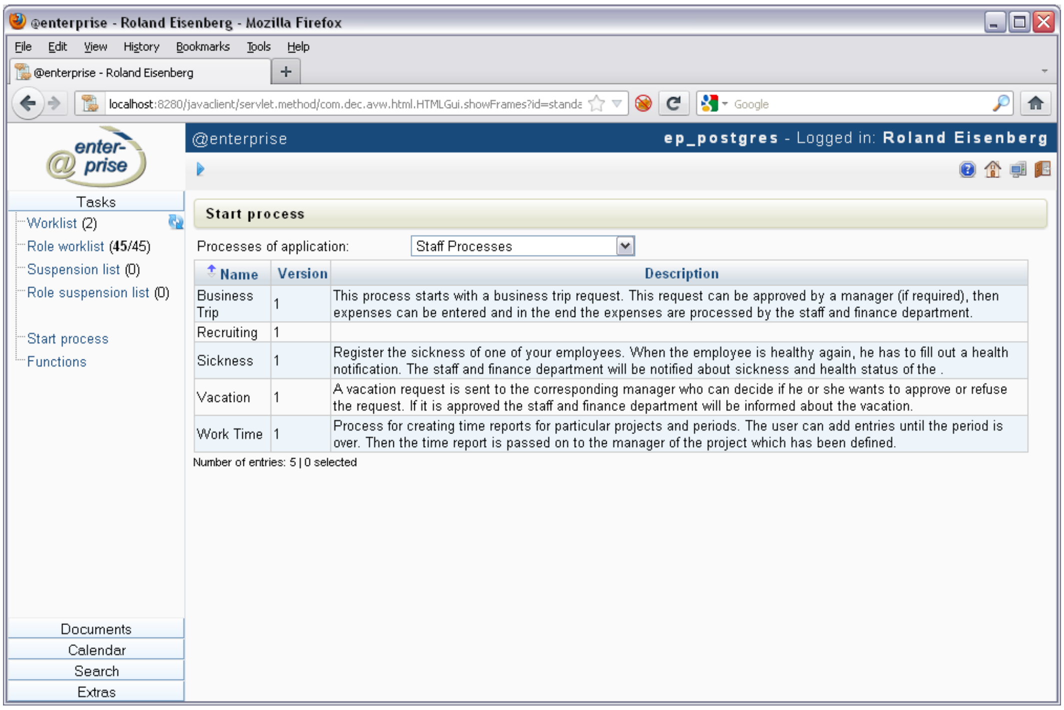


Figure 3.5: **Process list**

Content of the *process list*:

- **Name**: This column lists the name of the process.
- **Version:** This column contains the version of the process.
- **Description:** This column shows an additional *process description* if one has been entered.

Process Start Form

After choosing a process of the process list you have to activate the function *Start process* in the toolbar or make a double-click on the selected process. The process start form (see figure 3.6) will be shown in the work area.

Content of the *Process Start Form*:

- **Organizational unit:** This list contains all organizational units you are associated with. Select the organizational unit you want the process being started in.

- **Due at:** Enter the date by which the process should be finished. You can click on the calendar icon to use the **@enterprise** calendar assistant (this is optional).

- **Show time graph:** If you click on this symbol, a time graph will be displayed under the buttons *OK* and *Cancel*. This function is available only, when process mining was made before (see *Administration Guide* - chapter Process mining).

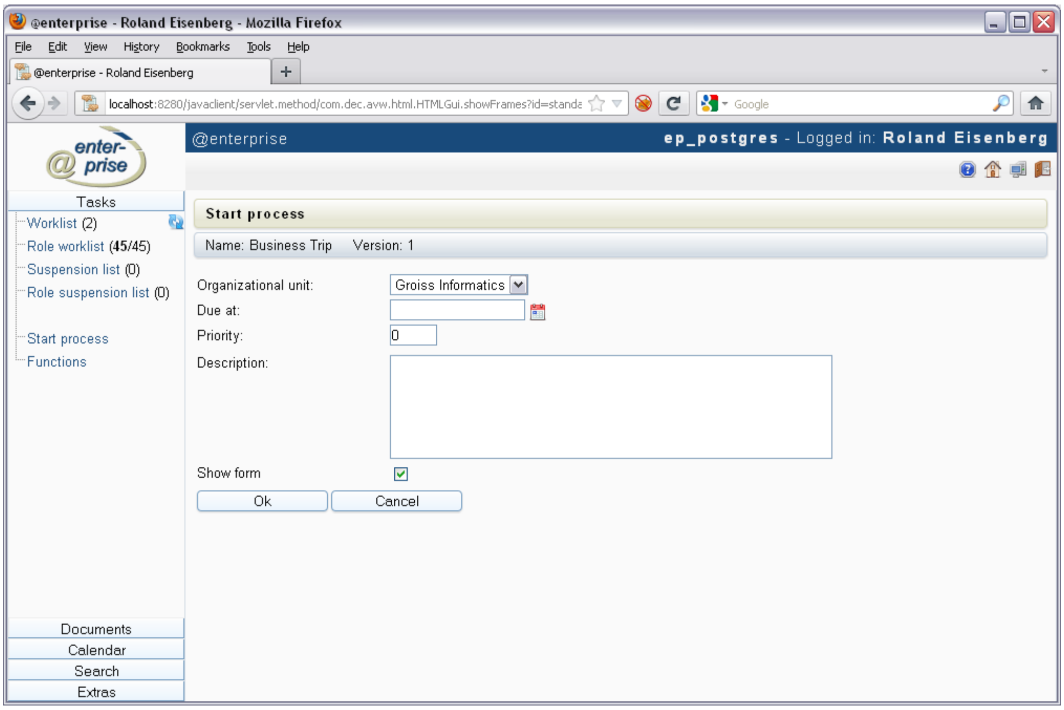


Figure 3.6: **Process start form**

- **Priority:** Enter here the priority for the process. If nothing is entered, the default-value will be used.
- **Subject:** Enter a subject for the process. This subject will be displayed in the role worklist, the work list, the suspension list and in several places, where it will be useful to the user. This field is available only if the process designer did not specify that the subject for the process is defined by a form field of a form attached to the process.
- **Description:** Enter a description for the process. It will be displayed in several places, where it will be useful to the user.
- **Show form:** If there is a form associated with the process and you activate this check-box the corresponding form will be opened immediately after you started the process.
- **Show formtemplates:** If this checkbox is activated, a table with all assigned form templates will be displayed. By double-clicking an entry the form is opened in readonly-mode. If a table-entry is selected and the button *Ok* is activated, the process will be started and the process form will be pre-filled with the data of the template form. This checkbox is available only, if templates have been assigned (see section 4.3.34).
- **Ok:** Use this button to confirm your entries and start a new process. Your personal worklist will be displayed (see chapter 3.1.1) and the first task of the started process will be in your worklist.

- **Cancel:** Use this button to abort the transaction. The entered data will be ignored and the process list will be shown.
- **Time graph:** For each new process with time data (process associated with time graph), time management will advise possible deadline and on demand it will be displayed in the process duration chart. On this chart the process duration is presented as histogram (blue), the deadline is the black vertical line and the time line is divided into 3 areas (red, yellow, green), which have following meaning:
  - Red area: In the red area most of processes were finished (depends from the time management settings under *Configuration* of **@enterprise**, default value is 95%). In this area processes will be completed with a probability between 0 and 95% (depends from user deadline).
  - Yellow area: In the yellow area 100% of processes were finished. Processes with a deadline in the yellow area will be finished with a probability between 95 and 100%.
  - Green area: The green area is the safe area. Processes in this area should be completed with 100% probability.

  With help of this chart you can select an appropriate deadline based on reliable requirements for the new process. The time management provides precise due date information and helps you to finish this process in the specified time. If the process was started, you can click on the *Due date* to get detailed information about the task and its due date (see section 3.2.20).

3.2 Functions of the Worklist Component

The worklist component offers a variety of special functions, which allows you to edit a task (or process respectively) or to get additional information about it.
Beyond **@enterprise** offers the function *Start Process* in the group *Tasks*. With the help of this function you are able to start new processes.
Some of the functions are available via the toolbar and some of them are only available via links in the corresponding work list tables (see chapter 3.1.1).

Functions provided via the toolbar:

- **Worklist:**
  - Give back
  - Complete
  - Complete and assign
  - Go back
  - Suspend
  - Make version
  - Reassign

  - New folder
  - Cut
  - Paste
- **Role worklist:**
  - Take
  - Suspend
- **Suspension list:**
  - Recall
- **Role suspension list:**
  - Recall
  - Recall and take

These functions will be applied to the entries of the worklist, i.e. tasks. To apply one of these functions to one or more entries, you have to select them in the *selection column* (first column in the corresponding work list).

Functions provided via links (names, icons, etc.) in the worklist tables:

- Edit form (click on the form icon)
- To document management (click on the folder icon)
- To note view (click on the note icon)
- Process history (click on the process name)
- Process definition (click on the process name)
- Schedule (click on the due date)
- Task functions (click on the function icon)
- Edit filter (click on the link called Edit)

3.2.1 Give back

This function can be activated by clicking on the icon *Give back* in the toolbar. At least one task has to be selected prior to activating this function.

It can be applied to every task in your worklist. It can be used to transfer a task, which has been taken from your role worklist, back to the role worklist. This can be useful when a task has been taken accidentally or when you want to give the task back to the role worklist for any other reasons.

If you are the direct actor of the task or if you handle the start task, the execution of this function will only change the status to *not handled* (**bold**).

Hints:

- The data in the forms and documents attached to this task will not be changed by this function.
- **Cancel:** You cannot cancel the operation once you activated the function *Give back* (but you can try to take it again).
- **Selection:** You can give back one or more tasks at once.

3.2.2 Complete

This function can be activated by clicking on the icon *Complete* in the toolbar. At least one task has to be selected prior to activating this function.

Once you have finished a task, you can activate the function *Complete* to send it further along its way.

The WFMS checks if the task has been handled correctly by evaluating the optionally defined post condition for this task. If the post condition is met, the task will be removed from your worklist and the following task(s) will be triggered. If the evaluation of the post condition fails, a message appears and the task remains editable in your worklist.
If the actor of the following activity is a role, the task will appear in the role worklist of the members of this role.

Hints:

- When a task is completed, a version (back up) of every form will be generated automatically. Versions of other attached documents are only created on request (see chapter 3.2.6).
- You cannot cancel the operation once you activated the function *Complete*.

3.2.3 Complete and assign

This function can be activated by clicking on the icon *Complete and assign* in the toolbar. At least one task has to be selected prior to activating this function.

The function can be used to forward one or more finished tasks to an actor you can specify. After the execution of this function, the task will be removed from your worklist and appears in the worklist of the selected user.

If the actor of the following step has not been defined yet or the next step is assigned to a role, a new HTML–page will appear in your *work area* after activating this function. This HTML–page can contain one of the following information:

1. *Select agent:* This is the case if the following step has not been assigned to an actor yet. You can enter any user of the WFMS (see figure 3.7).

2. *User selection:* This is the case if the following step is assigned to a role. The possible actors for the following step are defined by the role (see figure 3.8).

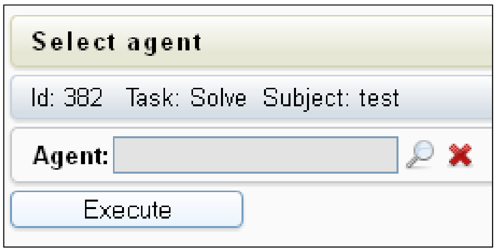


Figure 3.7: **Select agent**

Content of the HTML–page *Set agent*:

- **Agent:** The new agent for the task (user or role).
- **Execute:** Click this button to confirm your entries and forward the process to the selected user.

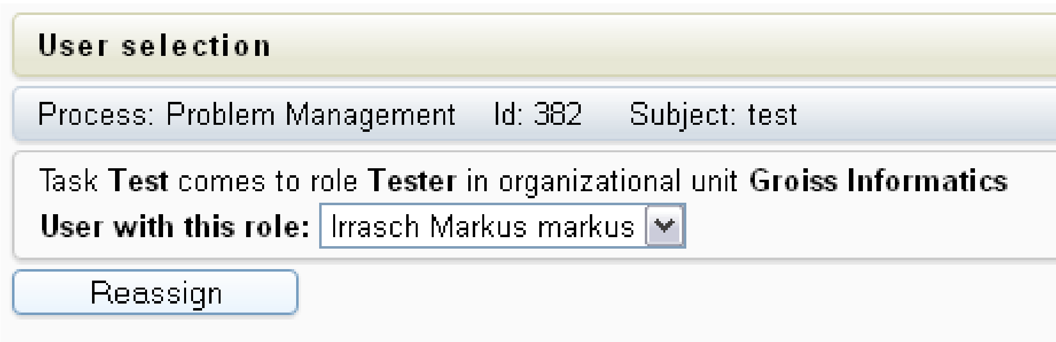


Figure 3.8: **User selection**

Content of the HTML–page *User selection*:

- **User with this role:** This Combobox contains all users who are assigned to the role of the following step. Select the specific user who should handle the next step.
- **Reassign:** Click this button to confirm your entries and forward the process to the selected user.

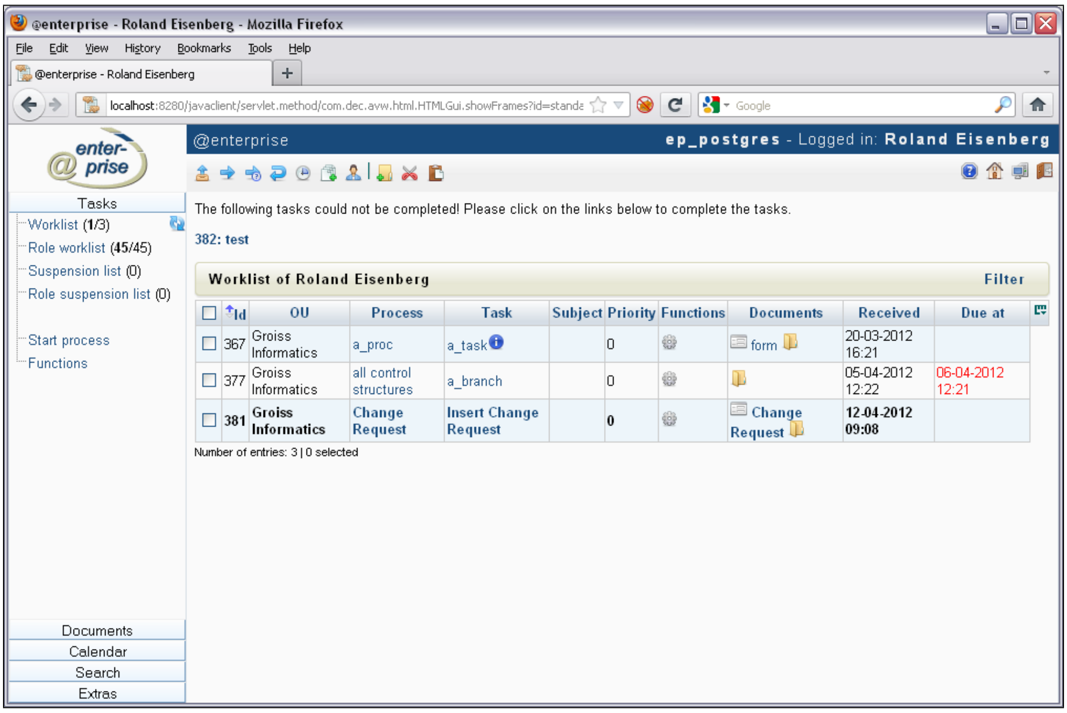
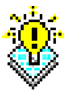


Figure 3.9: **Incorrect forwarding**

Incorrect forwarding

If a task cannot be forwarded correctly to the next user, you will still be transferred to your worklist but a message will be displayed on top of your work area (see figure 3.9).
A list contains all tasks (as links), which cannot be forwarded correctly. Click on an entry to be transferred to one of the previous HTML–pages to specify the actor of the following step.



Hint: After activating the function *Complete and assign* there is no possibility to abort the function. Not even the function *Back* of your browser will undo the effect of the function. The task will be forwarded to the specified user or role.

3.2.4 Go back

This function can be activated by clicking on the icon *Go back* in the toolbar. Exactly one task has to be selected prior to activating this function.

The function allows you to return to a previous task within the running process. This can be necessary when you cannot complete the task because incorrect data has been entered in a previous task.

When you activate this function, the HTML–page *Go back* (see figure 3.10) will be displayed in your *work area*. Select the task you want to return to from the list of previous tasks.

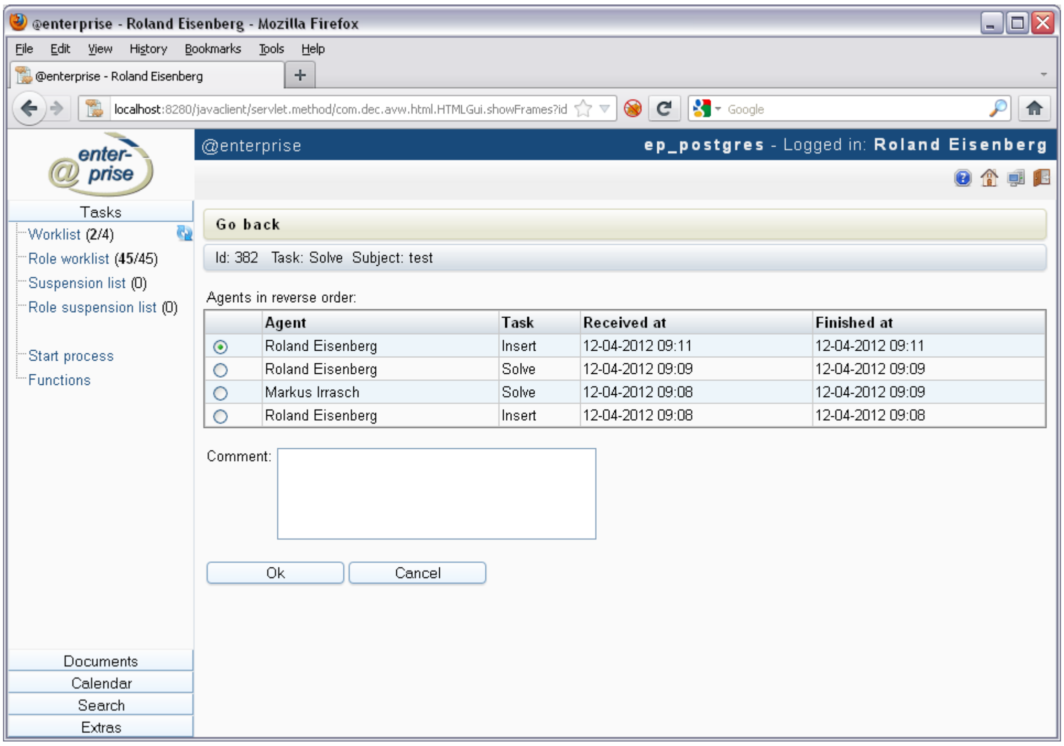


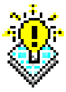
Figure 3.10: **Go back**

The WMFS removes the task from your worklist and puts the previously selected task in the personal worklist of the corresponding user. This user can now continue to handle the task.

Hint: A version of each form will be created when the function *Go Back* is executed. All documents will be kept. If compensation methods have been defined to the according tasks, they will be called.

Content of the HTML–page *Go back*:

- **Table of agents:** In this table all preceding actors of the process are listed in descending order (the first task is listed at the end). Select the entry to which you want to go back by using the selection column. The table contains the following information:
  - Selection column
  - *Agent:* Is the name of the actor who has handled this task of the process.
  - *Task:* Contains the name of the task.
  - *Received at:* Displays the point of time, the actor received the task.
  - *Finished at:* Shows the point of time, the actor completed the task.
- **Comment:** Here you can put some information explaining why you had to go back to a previous task.



Hints

- **Cancel:** You can always cancel the operation by using the button *Back*. Your personal worklist will be loaded.
- **Error message:** If you forgot to mark the task you want to go back to, a message will be displayed after activating the *Ok* button.

3.2.5 Suspend

This function can be activated by clicking on the icon *Suspend* in the toolbar. At least one task has to be selected prior to activating this function.

The function can be used to suspend tasks that are in your worklist right now. This can be useful when you have to wait for additional information to complete a task or when you want to defer the processing of the task until a later point in time.

After selecting the function *Suspend*, the HTML–page *Put into suspension list* will appear in your work area (see figure 3.11). Enter the date until when the actual task should be suspended. The task will not appear in your worklist until the given date but can be found in the suspension list instead.

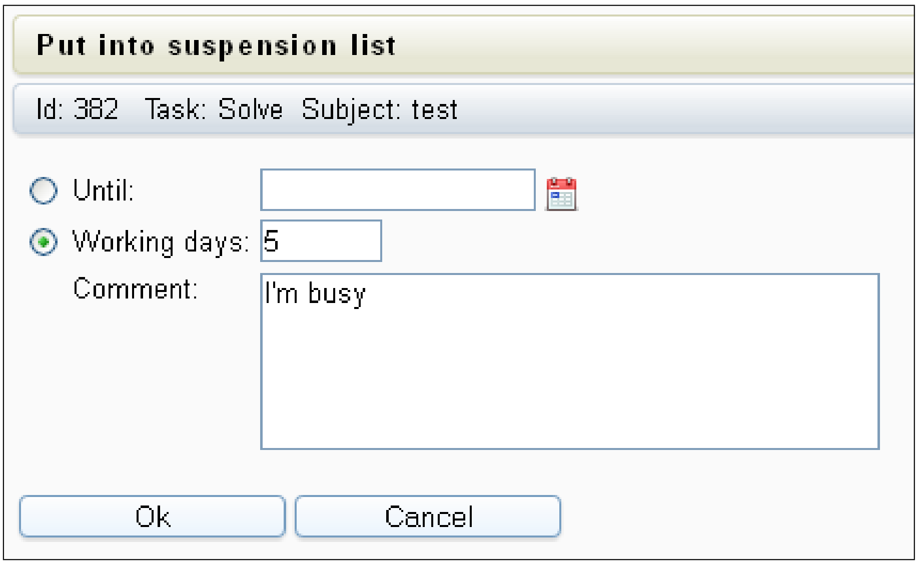


Figure 3.11: **Put into suspension list**

Content of the HTML–page *Put into suspension list*:

- **Until:** Enter the date until when the task should be suspended. The calendar assists you in entering the correct date. The radio button at the beginning of the line has to be ticked to use this field.

- **Working days:** Alternatively you can enter the number of working days the task should be suspended for. The radio button at the beginning of the line has to be ticked to use this field.
- **Comment:** Free Text.
- **Ok:** Clicking this button confirms the entry and the task will be suspended until the given date.

The task appears automatically in your worklist when the entered date is reached. If you need to continue working on a suspended task before the entered date, you can use the function *Recall* in the suspension list (see chapter 3.2.13).

Hint: You can always cancel the operation by using the button *Cancel*. Your personal worklist will be loaded.

3.2.6 Make version

This function can be activated by clicking on the icon *Make version* in the toolbar. At least one task has to be selected prior to activating this function.

The function can be used to create a version of the documents of the selected task. A version stores the content of a task at a given point in time. Later on, the content of older versions can be accessed if required.

Activating the function *Make version* displays the HTML–page *Make version* in your work area (see figure 3.12). Here you can enter a description for this version of the task.

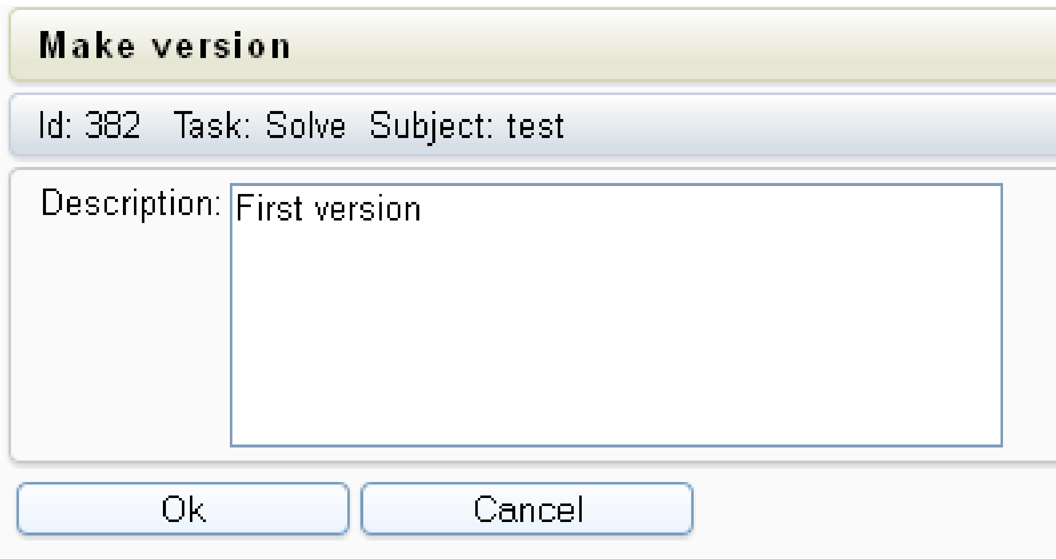


Figure 3.12: **Make version**

Content of the HTML–page *Make version*:

- **Description:** Use this field to enter a comment to the version.

Hint: The various versions of the processes can be accessed through the *process history* (see chapter 3.2.18).

3.2.7 Reassign

This function can be activated by clicking on the icon *Reassign* in the toolbar. Exactly one task has to be selected prior to activating this function.

The function enables you to temporarily leave the predefined path of the workflow and to insert additional steps. It allows you to define the next actor (user) of this task at runtime.

Activating this function loads the HTML–page *Reassign* (see figure 3.13), which allows you to react flexible to new situations that are not covered by the predefined process structure.

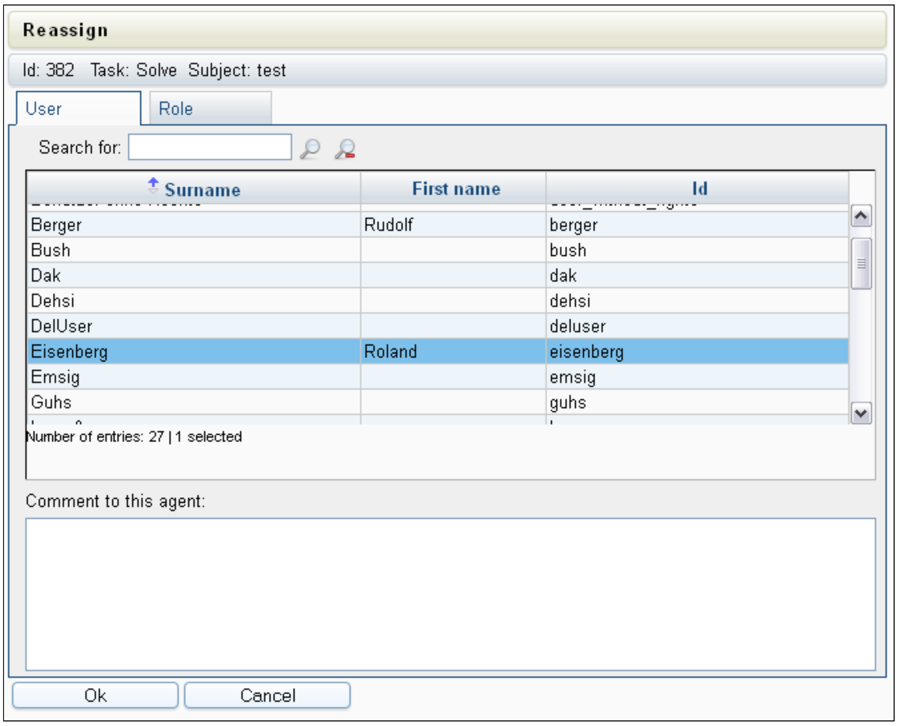


Figure 3.13: **Reassign**

Content of the HTML–page *Reassign*:

- **User:** List of available users. If to much users are displayed enter the surname or id or the first letters of any of these attributes into the field *Search for* and click the button *Search*. After this only users who match with your entries are displayed in the user list. After clicking the button *All entries* all users are displayed in the user list.

- **Role:** List of available roles.
- **Comment to this Agent:** Add a comment for the selected agent.

3.2.8 New folder

This function creates a new user folder in your worklist. The user folders are displayed as hierarchy (tree) in the navigation area. If no user folder exists in the worklist, you have to label the user folder only and press the button *OK*. If an user folder already exists, you can influence the order of the user folders or you can create an user folder of the parent folder (see figure 3.14).

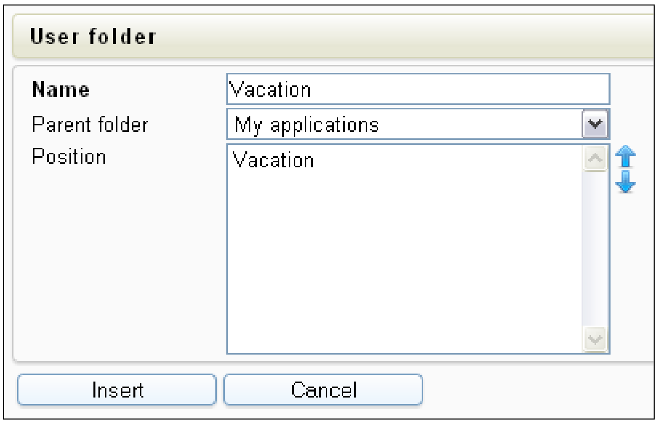


Figure 3.14: **New user folder**

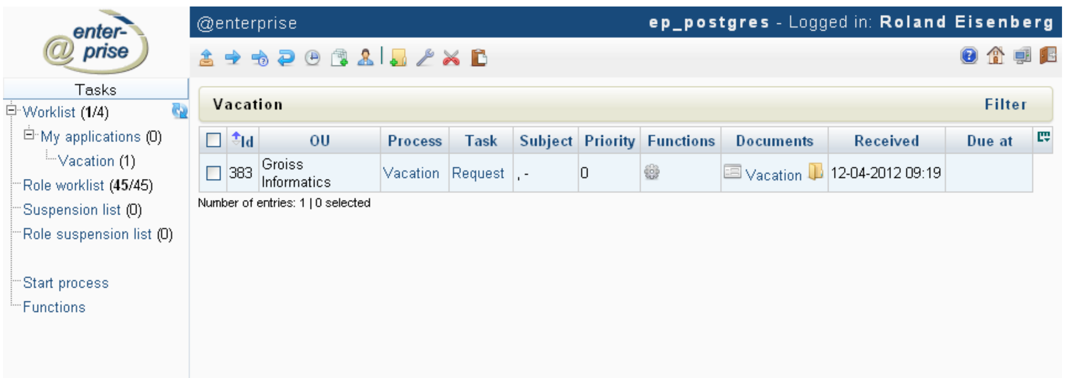


Figure 3.15: **User folder with parent folder**

After creating an user folder it is possible to edit it by clicking on the edit–symbol in the tool bar.

3.2.9 Cut

With this function it is possible to cut process instances and paste it in a subfolder. This function is the same as the function *Cut* (see chapter 4.3.7) in the DMS of @enterprise and will be described there.

3.2.10 Paste

With this function a previous cut process instance can be pasted. This function is the same as the function *Paste* (see chapter 4.3.10) in the DMS of @enterprise and will be described there.

3.2.11 AdHoc

This function is not activated by default. The activation procedure is described in the *System Administration Guide* → chapter *The Process Editor* → section *Tasks*. This function is similar to function *Send to* in **@enterprise** DMS (see section 4.3.13).

3.2.12 Take

This function can be activated by clicking on the icon *Take* in the toolbar. At least one task has to be selected prior to activating this function.

After the execution of the function *Take* the task disappears from all role worklists (of this role) and appears in your personal worklist.

Hint: No additional data is needed to take a task. Therefore it is not possible to abort this function.

3.2.13 Recall

This function can be activated by clicking on the icon *Recall* in the toolbar. At least one task has to be selected prior to activating this function.

In the suspension list you will find all tasks, which have been suspended until a given date. If you need to recall one or more of these tasks before reaching this date use the function *Recall*.

The selected tasks will disappear from your suspension list and show up in your personal worklist instead.

Hints

- **Cancel:** You cannot cancel the operation once you activated the function *Recall* (but you can suspend the task again).
- **Notice:** When the date in the column *Suspended until* is reached, the corresponding task will be recalled automatically.

3.2.14 Recall and take

This function can be activated by clicking on the icon *Recall and take* in the toolbar. At least one task has to be selected prior to activating this function.

In the role suspension list you will find all tasks, which have been suspended for a certain role until a given date. If you need to recall and immediately put one or more of these tasks into your worklist before reaching this date use the function *Recall and Take*.

The selected tasks will disappear from your role suspension list and show up in your personal worklist instead.

Example

Precondition: Your role suspension list is displayed and there is at least one task.

1. Mark the task by using the selection column in your role suspension list.
2. Select the function *Recall and Take* in the toolbar. The selected task will reappear in your personal worklist.

Hints

- **Cancel:** You cannot cancel the operation once you activated the function *Recall and Take* (but you can suspend the task again).
- **Notice:** When the date in the column *Suspended until* is reached, the corresponding task will be recalled automatically and therefore appear in the role worklist.

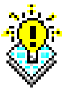
3.2.15 Edit form

The function *Edit form* can be found in the column *Documents* of your worklist, your role worklist and your suspension list. The form icon is being displayed at each task to which forms have been attached in the process specification.

If you click on the form icon, the form which has been created in the system administration will be displayed. The process–form is shown in the first tab. The tabs *Documents*, *Notes*, *History* and *Process* will be explained in the following sections. Following buttons are available in the *form* tab:

- **Save:** Use this button to save your changes. You will stay in the form view.
- **Save and complete:** Use this button to save your changes and automatically forward the task to the next actor of the process (see chapter 3.2.2). The form view will be closed and the worklist will be loaded.

If something has been changed in the form but not saved, an asterisk appears in the form tab beside the name. By activating the button *Save* the symbol disappears.



Hint: A form can only be edited by using the personal worklist. Opening the form view through the role worklist (or the suspension list respectively) only allows you to view the form. No changes can be made here.

3.2.16 To Document Management

To change to the document management of **@enterprise**either click the *folder icon* of a task or select a link of the group *Documents* in the *navigation area*. Further you can click on a link of an entry in your worklist (*Process*, *Task* or *Documents*) and select the tab *Documents*. The document management is explained in detail in chapter 4.

3.2.17 To Note View

To change to the note view of **@enterprise**either click the *note view icon* of a task. Further you can click on a link of an entry in your worklist (*Process*, *Task* or *Documents*) and select the tab *Notes*. Here you have the possibility to attach a note to the task.

3.2.18 Process history

The process history provides the detail view of one process instance. It shows all process steps a process has passed through. Additionally you can get information about who handled each task and how long it took to complete it. You will also find descriptions of the process versions.

The process history can be accessed in two ways:

1. By clicking the *Id* in the search result, the detail view of the process will be loaded.
2. Each worklist contains a link to the process history in the column *process*. After activating this link, the process history will be loaded (see chapter 3.1.1).
3. Click on one of a link (*Process*, *Task* or *Documents*) of an entry in your worklist and then select the tab *History*.

Design of the process history view

The process history will be displayed in a new window. You can leave the detail view by closing the window.

Content of the HTML–page *Process history*:

- **Description:** The description for the process (has been entered during the definition of the process).
- **Due at:** The date when the task should be finished.
- **To this step:** Here you will find information about this step, e.g. notes that have been attached during the execution of the function *Go Back*.

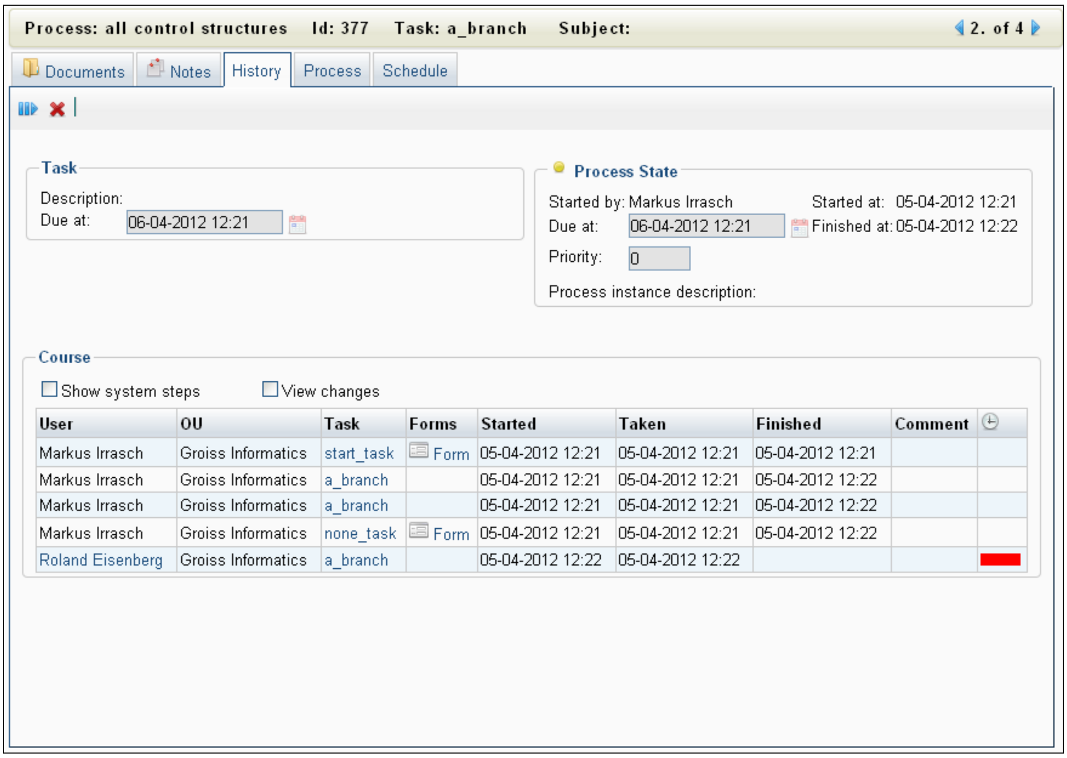


Figure 3.16: **Process History**

- **Started by:** Name of the user who started the process instance.
- **Started at:** The date when the process instance has been started.
- **Due at:** The date when the process instance should be finished.
- **Finished at:** The date when the process instance has been finished.
- **Priority:** The priority of the process instance.
- **Process instance description:** Description of the process instance (has been entered when starting the process).
- **Course:** This is the real process history. It is explained in detail beneath.
- **State update:** Depending upon the current process state several functions are offered here. These are the functions *Abort process, Reactivate process* and *Archive process*. These functions are described below in detail under *Functions of the process history*.

Course

The course lists all steps the process passed through so far.
Each line represents one single step. The columns contain the following information:

User	OU	Task	Forms	Started	Taken	Finished	Comment
	Groiss Informatics	begin		05-04-2012 12:21		05-04-2012 12:21	
Markus Irrasch	Groiss Informatics	start_task	Form	05-04-2012 12:21	05-04-2012 12:21	05-04-2012 12:21	
	Groiss Informatics	loop		05-04-2012 12:21		05-04-2012 12:21	
	Groiss Informatics	choice		05-04-2012 12:21		05-04-2012 12:21	
	Groiss Informatics	seventh choice: branch		05-04-2012 12:21		05-04-2012 12:21	
	Groiss Informatics	fourth choice: system steps		05-04-2012 12:21		05-04-2012 12:21	Aborted
	Groiss Informatics	first choice: an if		05-04-2012 12:21		05-04-2012 12:21	Aborted
	Groiss Informatics	nineth choice: goto (into the while)		05-04-2012 12:21		05-04-2012 12:21	Aborted
	Groiss Informatics	eight choice: subprocesses		05-04-2012 12:21		05-04-2012 12:21	Aborted
	Groiss Informatics	fifth choice: andpar		05-04-2012 12:21		05-04-2012 12:21	Aborted
	Groiss Informatics	third choice: a loop		05-04-2012 12:21		05-04-2012 12:21	Aborted

Figure 3.17: **Course**

- **User:** This column shows the name of the user who handled this step. If a task has not been completed, the user name acts as a link to the HTML–page *Reassign* (see chapter 3.13) .

Hint: If the column *User* contains the entry *system*, the row represents a *System Task*. These steps were handled automatically by the WFMS. System steps are only displayed if the check box *Show system steps* in the header of the table is checked.

- **OU:** This column shows the organizational unit in which the step has been handled.
- **Task:** This column lists the name of the task. The name represents a link, which can be used to display the task description (see chapter 3.2.18).
- **Forms:** Here you find all forms (if available) that have been modified in the corresponding step. The form icon is a link to the version of the form. It can only be viewed but not edited.

Hint: The upper part of the window (see chapter 3.2.18) always shows the current version of a form.

- **Started:** This column shows the point in time (date and time) when this step was started.
- **Taken:** This column shows the point in time (date and time) when this step was taken.
- **Finished:** Here the point in time (date and time) of the completion of the step is displayed. If this field is empty, the step has not been completed yet.

- **Comment:** This column contains additional information about a step (e.g. aborted, suspended).

- **Time management:** This column contains the process health and the state of the specific task. The task state indicator will be presented in following colours:

  - Green, if task is in planned area.
  - Yellow, if task is using reserved time.
  - Red, if task is out of the planned area (red area).
  - White, process deadline is in past.

  The process health value is also shown as tool tip help text, by moving the mouse over the indicator. If you click on the indicator, the tab *Schedule* will be opened and the task duedate chart will be displayed (see section 3.2.20).

  Hint: This column contains an indicator only, when a process mining was made for this process (see *Administration Guide* - chapter Process Mining).

The header of this table contains the check box *Show system steps*. If it is activated, all *System steps* (steps that were automatically handled by the WFMS) are displayed as well. If the second Checkbox *View changes* is activated, all changes per step will be shown which were edited by an actor.

Special cases:

1. **Version:** If a version of a process step has been created (see chapter 3.2.6), the description of this version will be displayed in an additional row below the according task.

2. **Sub process:** If the displayed process contains one or more sub–processes, a link in the upper right corner of the *course* transfers you to the process history of the sub–process.

Functions of the process history

In addition to the detailed information about a selected process instance, the *Process history* offers the following functions:

- **Abort process:** Activate this link to abort the currently displayed process. You have to confirm this function. After a process has been aborted the link *Abort process* disappears. The two links *Reactivate process* and *Archive process* will be displayed instead.

- **Reactivate process:** Clicking on this link reactivates a previously aborted process (i.e. the process is active again). After a process has been reactivated the link *Reactivate process* and the link *Archive Process* disappear. The link *Abort process* will reappear instead. On the reactivation mask it is possible to activate the checkbox *Take the reactivated Tasks*. If activated, the current user gets the last tasks in his worklist instead of the last editors.

- **Archive process:** Clicking on this link archives a previously aborted process (it will be finally terminated). An archived process cannot be reactivated anymore. After a process has been archived, the process history window will be closed automatically.

- **Supplement:** Clicking on this link starts a supplement-task for the running process. This function is available only, if a supplement–task is defined for this process and the current user has the necessary rights (see *System Administration* → *Workflow Modelling* → *Tasks* → *Supplement of forms*). This is useful, when a process must be processed further, but supplements will be added at a later date.
- **Super process:** The link *Super process* only appears in the process history of a sub process. Clicking on this link transfers you to the super process.

Hint: The functions are listed by their name in the process history. The name acts as a link to the function.

3.2.19 Process definition

The tab *Process* is the fifth tab, which can be reached by one of the link of an entry in the worklist (*Process*, *Task* or *Documents*).

This tab displays additional information about the process and position in the process (see figure 3.18):

Content of the HTML–page *Task Description*:

- **Id:** The id of the process instance.
- **Version:** Each process instance has a version number, which can be found here.
- **Description:** The description for the process.
- **Position in process:** A graphical representation of the process with the actual task being highlighted is displayed here.

3.2.20 Schedule

Here the user can see how much planned time is already used and how long time remains until task deadline. The user additionally can see following information on the chart (see figure 3.19):

- **Blue vertical line:** Current time marker
- **Red vertical line:** Task duedate time marker
- **Black vertical line:** Process due date time marker
- **Black horizontal line:** Process health line - is a function from time f(T), which shows user probability (between 0 and 1) to finish process in specified time limits (process deadline), if this task will be finished in time T.

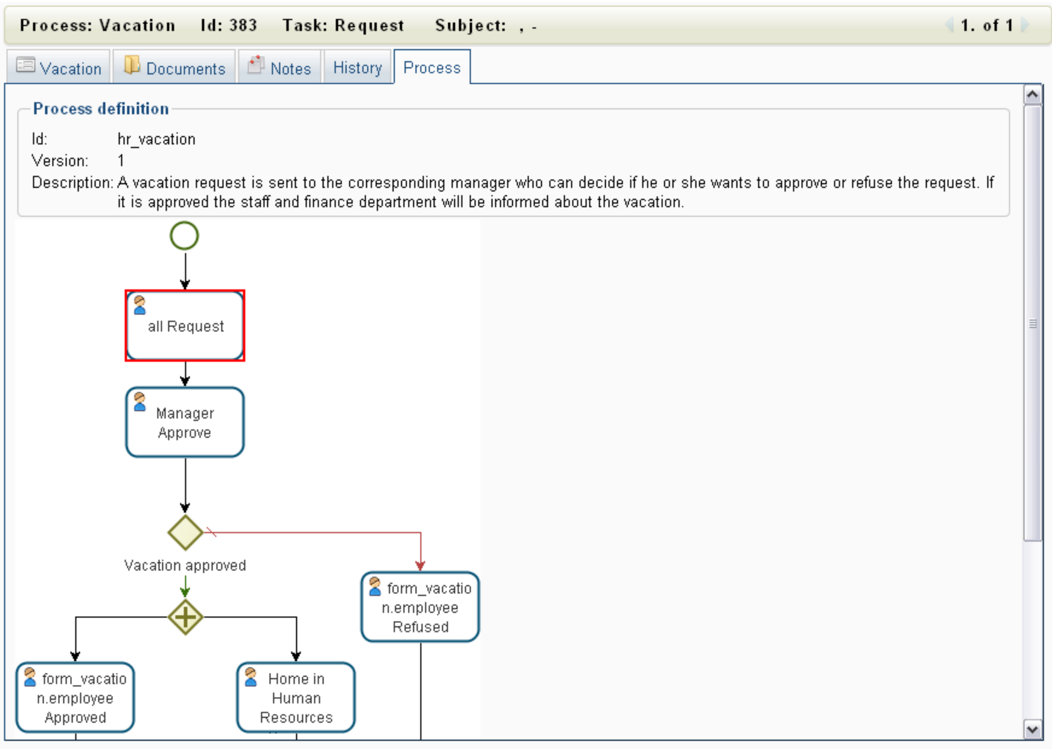


Figure 3.18: **Process definition**

The time line can be divided into some of following areas:

- **Green area** is a planned time. This area is always visible on chart, but sometimes it overlaps with the read area or it is included in the area.
- **Yellow area** presents process time buffer. This time buffer is shared between all tasks in the process. If a task is in the yellow area, it will decrease time reserves of process. The yellow area is not visible if process has no time reserves.
- **Red area** is an indication of low process health. It starts in time where the process health function result is below 95% (value specified in settings, default 95%), and ends at process due date. Red area is not visible for the last task in the process.
- **White area** is the time after process deadline. In this area time management is undefined, user should manually shift process deadline to be able use time management again for this process.

3.2.21 Task functions

Each single task in your worklist has defined certain functions, called *task functions*. Task functions are e.g. adding a process note or setting the due date of the task.

You can view the defined task functions by clicking the *function icon* next to the column *Priority* in your worklist. A context menu will appear which lists all available task functions.

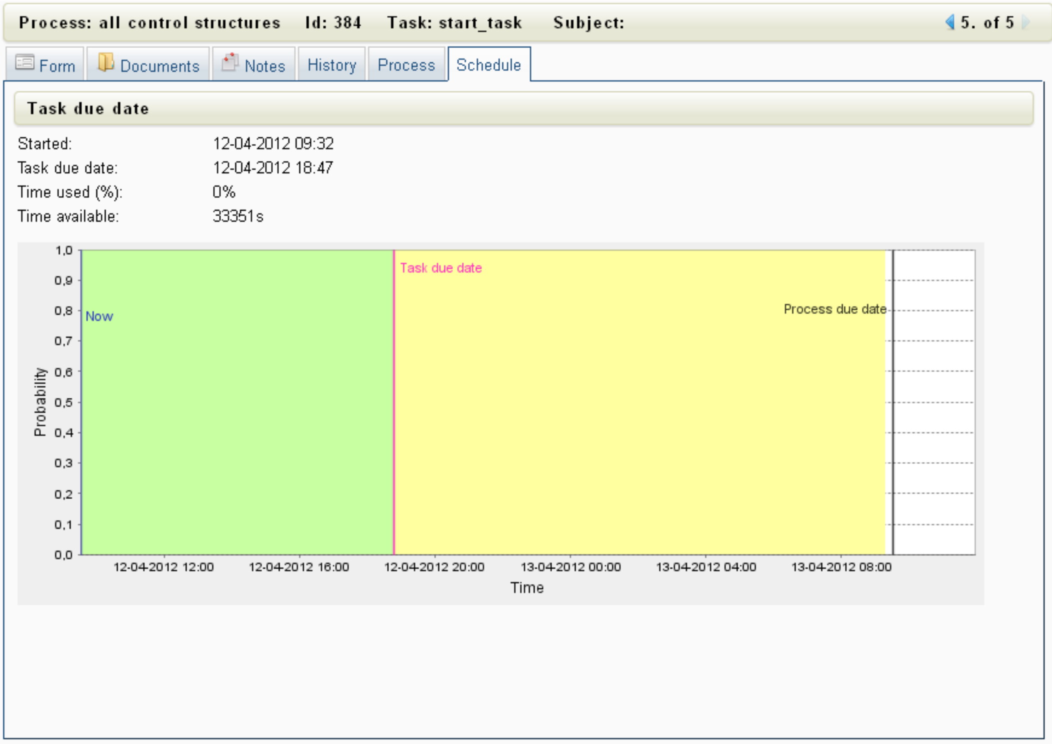


Figure 3.19: **Task duedate chart**

Hint: Task functions are defined in the system administration and can therefore vary in kind and number. **@enterprise** offers some task functions by default. These task functions will be shown in the appendix (see chapter 10.1).

4 The Group Documents

The group *Documents* supplies you with all functions of the document management system (**DMS**) of **@enterprise**.

The *document management* of **@enterprise** supports the handling of documents that have been attached to a task and a process respectively. You can apply various functions (from the toolbar) like *Delete Document* to every single document and thus handle them easily.

The document management basically can be accessed in two ways:

1. When you successfully attach a new document to a task in your worklist (function *Add Document* - see chapter 4.3.2), you will be transferred to the document management automatically.

2. A document symbol in the column *Documents* of the worklist indicates that a document has been attached to this task. Clicking this icon will transfer you to the document management as well.

The document management can be recognized by the title of the table in the *work area*. Since documents can be added to tasks, the title of the table in the document management refers to the process (*Content of process folder XX* - see figure 4.1).

4.1 Concepts in Connection with the DMS

Document Management System (DMS) That component of **@enterprise** which is responsible for the administration of *DMS–Objects* – also independent of processes.

DMS–Object a umbrella term for all kind of objects which can be handled with the DMS of **@enterprise** (e.g. documents, forms, notes, etc.).

Form stands for a HTML-Form.

Document stands for any document (doc, xls, txt, pdf, ...) which can be described by metadata with the help of a HTML-Form.

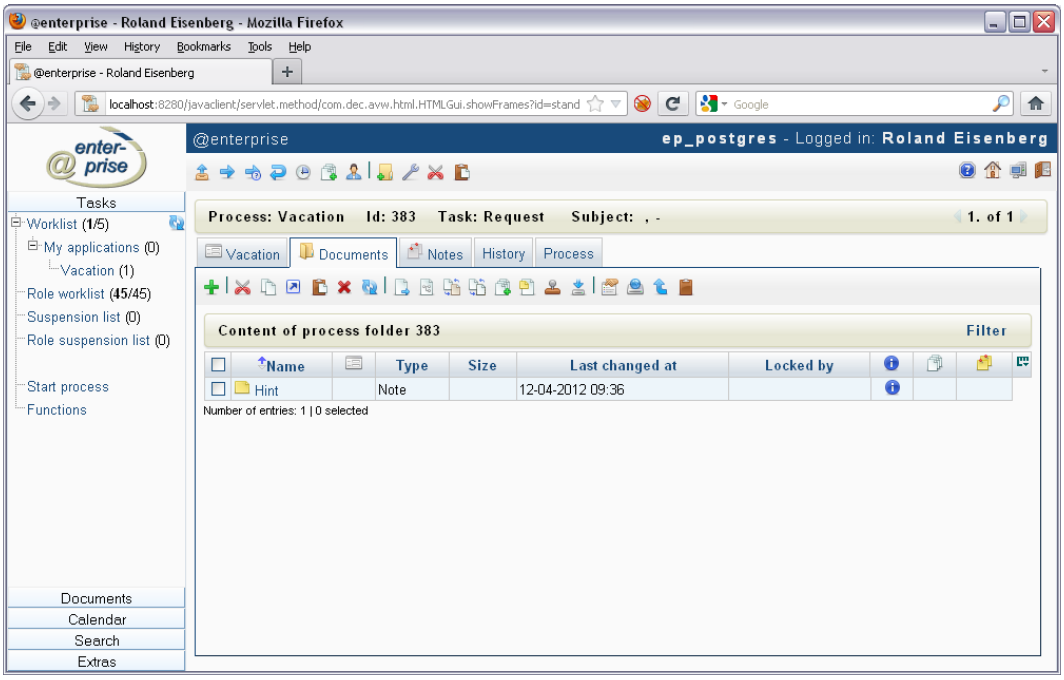


Figure 4.1: **Document table**

Note stands for a special kind of form (contains only the fields *Subject, Content*) which can be used by the user to create notes.

Folder can be used to group DMS–Objects (analogous to folders of the file system).

Web link can be used to define a link onto a URL.

Process form stands for a form attached to a process.

DMS–Object–Table stands for the content of the work area in the DMS of **@enterprise**, after a Folder has been selected in the navigation area. This table contains all DMS–Objects stored within the DMS of **@enterprise**.

4.2 *Components of the Document Management*

The document management in **@enterprise** contains multiple elements. The main table is the *DMS–Object–Table*. It lists all documents that have been attached to a task or process respectively. The *Detail View* shows additional information about a document. Multiple versions can be created for each document. The *Version Table* lists the various versions of a document.

4.2.1 DMS–Object–Table

The document management of **@enterprise** appears in your work area as the DMS–Object–Table (see figure 4.2). The rows of this table represent the documents that have been attached to a process.

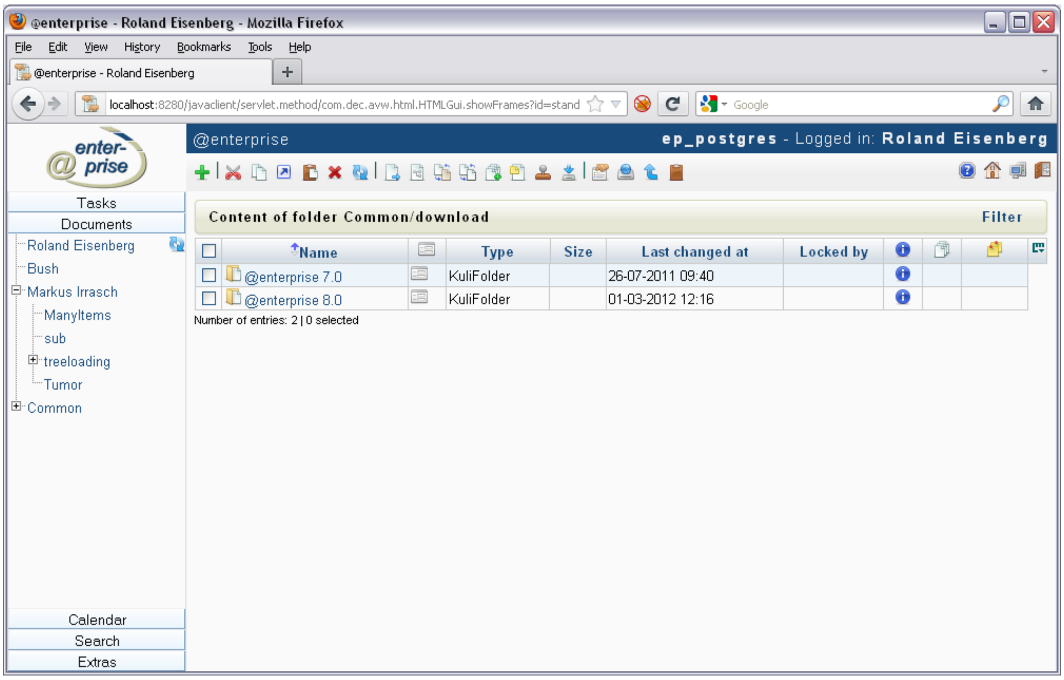


Figure 4.2: **The Group *Documents***

Columns of the DMS–Object–Table:

- **Selection column:** can be used to select one or more documents.
- **Name:** This column contains the name of the document in **@enterprise**. The name is a link to the function *Display Document*. Click on this name to view the document in your work area or to save it (see chapter 4.3.35).
- **Additional data:** This icon is a link to the a form which holds additional data describing the corresponding document. It will be opened in a new browser window. Not all documents will have such a corresponding form.

- **Type:** This column lists the name of the document type.
- **Size:** This column shows the size of the document in KB (Kilo Bytes).
- **Last changed at:** This column contains the point in time of the last modification of this document. A document is defined as being changed if
  - the content has been changed by another application (via *Check Out* and *Check In*),

  - the function *Replace Document* has been executed, or
  - the function *Change Name* has been executed.

- **Locked by:** This column shows the *lock icon* if the document is locked. The name of the user who locked the document is displayed as well.

- **Details:** This column contains a symbol, which acts as a link to the *Detail View* (see chapter 4.3.36).

- **Version:** This column contains the version icon, which is a link to the *Version table* of a document (function *To Version Table*). The icon is only displayed if versions of the document exist (see chapter 4.3.18).

- **To Note View:** This column contains the *note view icon*, which is a link to the table of attached notes. The icon is displayed only if at least one note has been attached to the task or process respectively.

The document management can be accessed through your personal worklist as well as via the role–worklist or the suspension list. A corresponding button will be displayed below the document list (e.g. *Back to Worklist*). Use this button to go back to the personal worklist, role–worklist or the suspension list respectively.

4.3 Functions of the Document Management

The document management offers a variety of functions to handle the documents of processes. The functions can be found in the toolbar (see chapter 2.4.1) and in the DMS–Object–Table (see chapter 4.2.1).

The following functions can be found in the toolbar:

- New
- Cut
- Copy
- Link
- Insert
- Delete
- Refresh
- Send to
- Start process
- Change type
- Replace

- Make version
- Attach note
- Sign
- Download
- Folder properties
- Web folder
- Upward
- Clipboard

To execute such a function, one or more documents have to be selected. Each document in the DMS–Object–Table must have different names and extensions.

The following functions can be found in the DMS–Object–Table:

- Display DMS–Object
- Display Type Form
- To Detail View
- To Version Table
- To Note Table

4.3.1 New folder

This function can be activated by clicking on the icon *New* in the toolbar.

The function allows you to create new folders within the DMS.

After activating this function and selecting the DMS-element *Folder*, the HTML–page *Add folder* will be displayed in your work area (see figure 4.3).

Content of the HTML–page *Add folder*:

- **Type:** Select that type which will be assigned to the new folder.
- **Template:** If you tick this CheckBox the template which has been defined for the selected folder type will be used at the creation of the new folder.
- **Name:** Enter the name for the new folder into this field. The name must not contain one of the following special characters: / \ : * ? < > ”
- **Permission list:** Use the permission list to define rights for the folder. This rights are needed by the users in order to be able to apply the corresponding functions on the folder. This field is only available if the system administrator activated the use of permission lists.

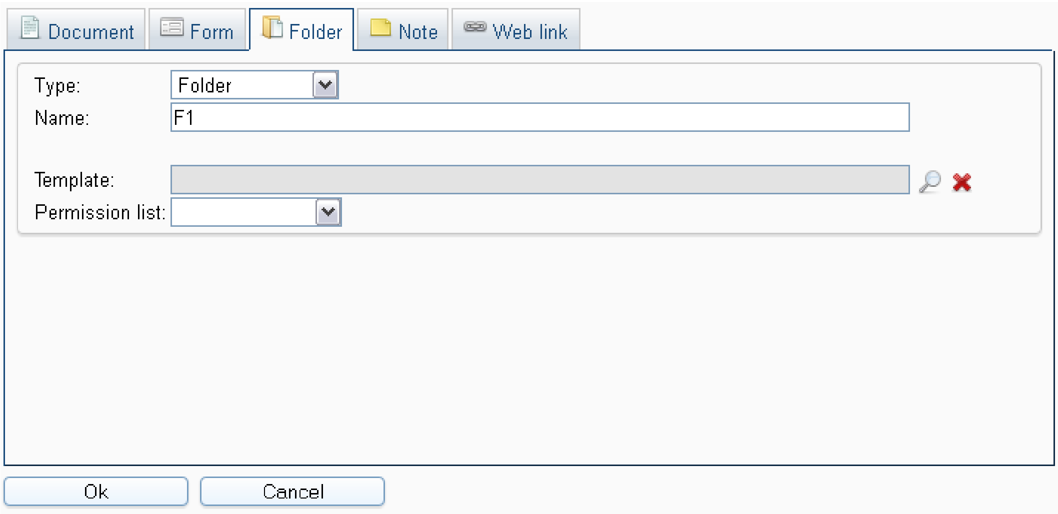


Figure 4.3: **Add folder**

- **OK:** Clicking this button confirms your entries and the new folder will be inserted as subfolder of the currently selected folder. If the folder type of the new folder is *Standard folder* the DMS–Object–Table will be displayed in your work area. Otherwise the meta data form of the new folder will be displayed.

Example

Precondition: Your personal dms folder is displayed.

1. Click the *New* icon in the toolbar. The HTML–page shown in figure 4.3 will appear in your work area.
2. Select the radio–button *Folder* and select a type. This example uses the type *Standard folder*.
3. Enter the name for the new folder into the field *Name*.
4. Click the *Ok* button. The specified folder will be created and appear in the DMS as a subfolder of your personal folder.

Hint: If any field of the HTML–form has not been filled in (except the fields *Permission list* and *Template*), a reminder will be displayed after clicking the *OK* button.

4.3.2 New document

This function can be activated by clicking on the icon *New* in the toolbar.

The function allows you to add new documents to the currently selected folder of your DMS.

After activating this function and selecting the DMS-element *Document*, the HTML–page *Add Document* will be displayed in your work area (see figure 4.4).

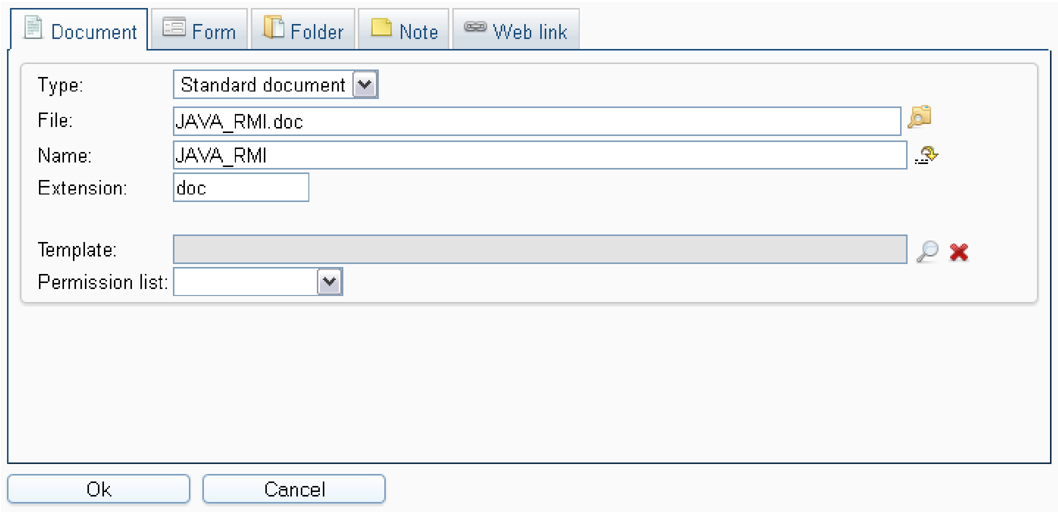


Figure 4.4: **Add document**

Content of the HTML–page *Add document*:

- **Type:** This Combobox allows you to specify the type of the document in **@enterprise**. This type can be used for grouping but it also contains additional information. The available types are predefined in the system administration.
- **Template:** If you tick this Checkbox the new document is based on the template which has been defined for the selected type of the new document by the system administrator.
- **File:** Enter the absolute file name of the document you want to attach in this text field. Alternatively you can use the button *Browse...* to fill it in.
- **Name:** Enter the name of the document, which the document should have within **@enterprise**. Alternatively you can use the button *Accept name* to fill in this field.
- **Extension:** Enter the file extension of the attached document (e.g. *html* or *doc*). Alternatively you can use the button *Accept name* to fill in this field.
- **Permission list:** With the help of a permission–list it is possible to define rights for the new document, which are needed by the users in order to be able to perform the corresponding functions onto the document. This field is only available if the system administrator activated the use of permission lists.

- **Browse:** Use this icon to display the dialog window *File Upload*, which helps you selecting the document you want to attach. The WFMS puts the absolute name of the selected file into the form field *File*.

- **Accept name:** Use this icon to automatically fill in the text fields *Name* and *Extension* by extracting the values from the original file name.

Example

Precondition: Your personal dms folder is displayed.

1. Click the *New* icon in the toolbar. The HTML–page shown in figure 4.4 will appear in your *work area*.
2. Select the radio–button *Document* and select a type. This example uses the type *Standard document*.
3. Enter the absolute name of the file to be loaded in the field *File*.
4. Fill in the fields *Name* and *Extension*. The example uses the original file name. The field *Name* contains *example* and the field *extension* contains *txt*.
5. Click the *Ok* button. The specified file will be loaded into the WFMS and appear in the DMS.

Hints:

- **Error message:** If any field of the HTML–form has not been filled in (except the field *Permission–List*), a reminder will be displayed after clicking the *Ok* button.

4.3.3 New form

This function can be activated by clicking on the icon *New* in the toolbar.

The function allows you to create new forms within the DMS.

After activating this function and selecting the DMS-element *Form*, the HTML–page *Add form* will be displayed in your work area (see figure 4.5).

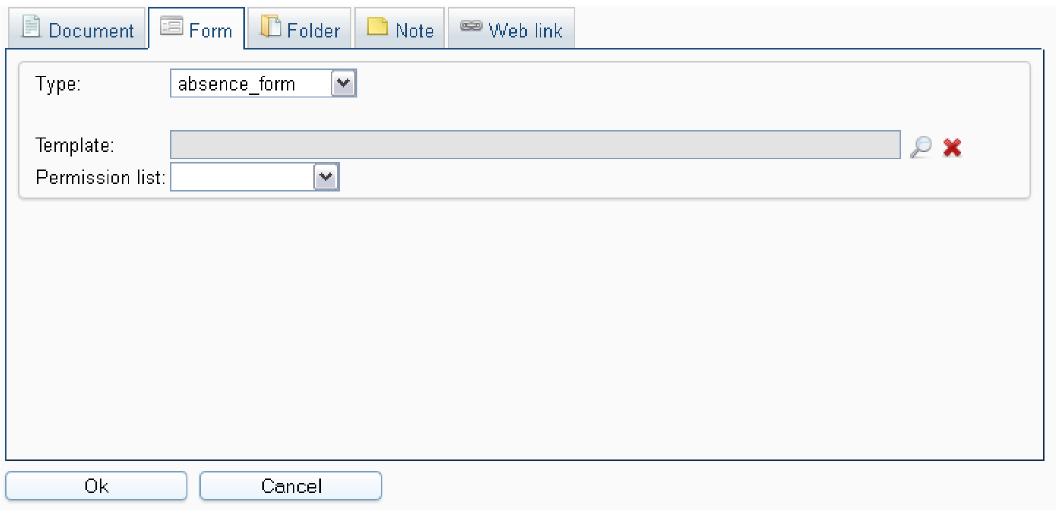


Figure 4.5: **Add form**

Content of the HTML–page *Add form*:

- **Type:** Select the type to which the new form will be assigned. With the form type *News* you can show this form after the login by activating the checkbox *Show Message on Login*. If this form is in the folder *Common* → *News*, this symbol will indicate the message of the day in the tool bar.

- **Template:** If you tick this checkbox the new form will be based on the template which has been defined for the selected type. With the help of templates it is possible to define forms where e.g. some fields of the form are already filled in with default values.

- **Permission list:** Use the permission–list to define rights for the form. This rights are needed by the users in order to be able to apply the corresponding functions on the form. This field is only available if the system administrator activated the use of permission lists.

- **Ok:** Clicking this button confirms your entries and adds the form to the currently displayed folder of your DMS. After this the new form will be displayed and you can fill in the form fields and confirm your entries by clicking the button *Finish*. The DMS–Object–Table will now be displayed in your work area.

Example

Precondition: Your personal DMS folder is displayed.

1. Click the icon *New* in the toolbar. The HTML–page shown in figure 4.5 will appear in your work area.

2. Select the radio–button *Form* and select a type.

3. Click the *OK* button. The form of the selected type will be displayed, so you can fill in the form fields and confirm your entries by clicking the button *Finish*. Now the form will appear in your personal DMS folder.

Hint: If the field *Type* of the HTML–form has not been filled in a reminder will be displayed after clicking the *OK* button.

4.3.4 Defining Templates

In the DMS of **@enterprise** it is possible to define templates for folders, documents and forms. Only a system administrator can accomplish this function. So, if you need some templates contact the system administrator, please.

The system administrator has to log in as user *sysadm* and open the folder *Documents* → *sysadm* → *templates*. Every folder, document or form which has been inserted into this folder serves as a template for the corresponding objects of the DMS.

If a user adds a new folder, form or document of the same type he can tick the checkbox *Template*. Therefore his new object is based on the corresponding template which resides in the folder *Template*, i.e. if there are some fields already filled in in the template object, this fields are also filled in in his new object.

4.3.5 New note

This function can be activated by clicking on the icon *New* in the toolbar.

The function allows you to create new notes within the DMS.

After activating this function and selecting the DMS-element *Note*, the HTML–page *Note* will be displayed in your work area (see figure 4.6).

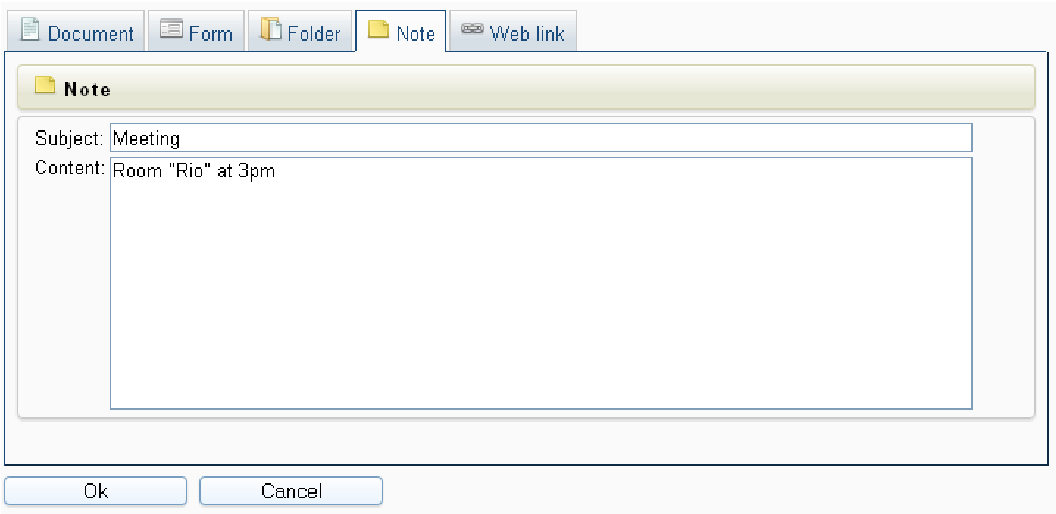


Figure 4.6: **Note**

Content of the HTML–page *Note*:

- **Subject:** Enter the subject which should be assigned to the note. This subject is displayed in the column *Name* of the DMS–Object–Table.
- **Content:** Enter the content of the note.
- **OK:** Clicking this button confirms your entries and the new note is added to the DMS–Object–Table which is displayed in your work area after the function has been executed.

Example

Precondition: Your personal DMS folder is displayed.

1. Click the icon *New* in the toolbar. The HTML–page shown in figure 4.6 will appear in your work area.

2. Select the radio–button *Note* and enter a subject for the new note.

3. Enter a content for the new note.

4. Click the *OK* button. The new note is added to the DMS–Object–Table which is displayed in your work area

4.3.6 New web link

This function can be activated by clicking on the icon *New* in the toolbar.

The function allows you to create new web links within the DMS.

After activating this function and selecting the DMS-element *Web Link*, the HTML–page *Web link* will be displayed in your work area (see figure 4.7).

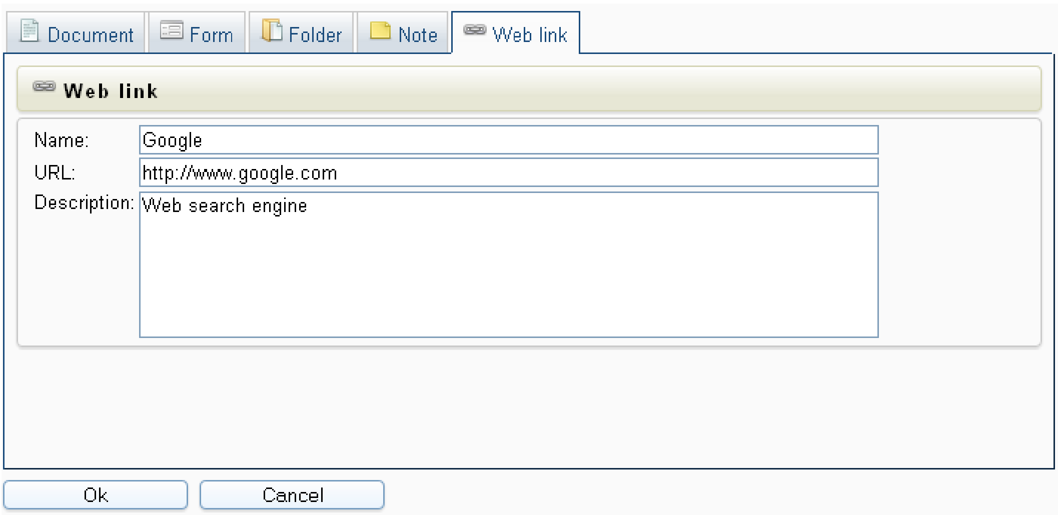


Figure 4.7: **Web link**

Content of the HTML–page *Web link*:

- **Name:** Enter here the name for the web link. It will be displayed in the column *Name* of the DMS–Object–Table.
- **URL:** The URL pointing to the web link.
- **Description:** Free text.
- **OK:** Clicking this button confirms your entries and the new web link is added to the DMS–Object–Table which is displayed in your work area after the function has been executed.

Example

Precondition: Your personal DMS folder is displayed.

1. Click the icon *New* in the toolbar. The HTML–page shown in figure 4.7 will appear in your work area.
2. Select the radio–button *Weblink* and enter a name for the new web link (e.g. Groiss Informatics GmbH).
3. Enter a URL for the new note (e.g. http://www.groiss.com).
4. Click the *OK* button. The new web link is added to the DMS–Object–Table which is displayed in your work area.

4.3.7 Cut

This function can be activated by clicking on the icon *Cut* in the toolbar. At least one item of the DMS has to be selected prior to activating this function.

The function *Cut* can be used to move entries of a DMS folder into the clipboard of @**enterprise**. Then you can use the function *Paste* to insert the entry of the clipboard into another DMS folder.

Hints:

- The entries inserted into the clipboard via the function *Cut* remain there until other entries are put into the clipboard via the functions *Cut, Copy* or *Link*, or until you flush the content of the clipboard with the activation of the function *Empty clipboard* which can be found in the clipboard.
- If the function *Cut* is not directly followed by the function *Paste* the entry which has been copied to the clipboard remains in the folder where the function *Cut* has been applied on it.

Example

Precondition: The DMS–Object–Table is displayed. It contains at least one document in your personal folder.

1. Mark the document you want to cut of your personal folder by using the selection column.
2. Activate the icon *Cut* from the toolbar. The document will be copied to the clipboard of @**enterprise**.
3. Open the folder *Common* of your DMS.
4. Activate the icon *Paste* in the toolbar. The document is removed from your personal folder and inserted into the folder *Common* of the DMS. The clipboard is empty.

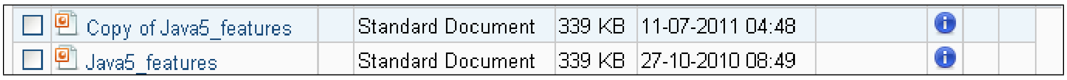
4.3.8 Copy

This function can be activated by clicking on the icon *Copy* in the toolbar. At least one item of the DMS has to be selected prior to activating this function.

The function *Copy* can be used to copy entries of a DMS folder into the clipboard of **@enterprise**. Then you can use the function *Paste* to copy the entry of the clipboard into another DMS folder.

For the destination directory of the function *Copy* you have two alternatives:

- The destination directory (the directory to which you want to copy the entry) is different from the source directory (the directory where you activated the function *Copy*). In this case the name of the file in the source directory and in the destination directory are the same.
- The destination directory and the source directory are the same. In this case the name of the copied file in the destination directory is :*Copy of 'File name'* (see figure 4.8).



Copy of Java5_features	Standard Document	339 KB	11-07-2011 04:48	
Java5_features	Standard Document	339 KB	27-10-2010 08:49	

Figure 4.8: **Copy of ... / Link to ...**

Hint: The entries inserted into the clipboard via the function *Copy* remain there until other entries are put into the clipboard via the functions *Cut, Copy* or *Link*, or until you flush the content of the clipboard with the activation of the function *Empty Clipboard* which can be found in the clipboard.

Example

Precondition: The DMS–Object–Table is displayed. It contains at least one document in your personal folder.

1. Mark the document you want to copy by using the selection column.
2. Activate the icon *Copy* from the toolbar. The document will be copied to the clipboard of **@enterprise**.
3. Open the folder *Common* of your DMS.
4. Activate the icon *Paste* in the toolbar. The document is removed from the clipboard and inserted into the folder *Common* of the DMS. The clipboard is empty. The copied document also still remains in your personal folder.

4.3.9 Link

This function can be activated by clicking on the icon *Link* in the toolbar. At least one item of the DMS has to be selected prior to activating this function.

The function *Link* can be used to copy entries of a DMS folder into the clipboard of **@enterprise**. Then you can use the function *Paste* to create a link to the original entry within another DMS folder.

The inserted link gets the name *Link to 'File name'*. The icon of the document is extended by the *link icon* (see figure 4.8).

Hints:

- Through the function *Link* only a link to the original document is created. Therefore, if you edit the original document or the link, you always edit the same document.
- The entries inserted into the clipboard via the function *Link* remain there until other entries are put into the clipboard via the functions *Cut, Copy* or *Link*, or until you flush the content of the clipboard with the activation of the function *Empty Clipboard* which can be found in the clipboard.

Example

Precondition: The DMS–Object–Table is displayed. It contains at least one document in your personal folder.

1. Mark the document for which you want to create a link by using the selection column.
2. Activate the icon *Link* from the toolbar. The document will be copied to the clipboard of **@enterprise**.
3. Open the folder *Common* of your DMS.
4. Activate the icon *Paste* in the toolbar. The document is removed from the clipboard and a link to it is inserted into the folder *Common* of the DMS. The clipboard is empty. The linked document still remains in your personal folder.

4.3.10 Paste

This function can be activated by clicking on the icon *Paste* in the toolbar.

The function *Paste* can be used to insert entries of the clipboard into an DMS folder of **@enterprise**. As the case may be how the entries have been inserted into the clipboard (copy, cut, link) the function *paste* therefore finishes the respective function.

Thus the functions *copy, cut* and *link* are always connected with the function *paste*.

4.3.11 Delete

This function can be activated by clicking on the icon *Delete* in the toolbar. At least one item of the DMS–Object–Table has to be selected prior to activating this function.

The function *Delete* can be used to delete selected items of the DMS–Object–Table.
To delete an item it has to be selected by using the selection column. Activating the function *Delete* shows a dialog window that asks the user to confirm the request.

Confirming this dialog window by using the *OK* button deletes the selected item. The function can be aborted using the *Cancel* button in this dialog window.

After the execution of the function, the DMS–Object–Table will be displayed. If documents have been deleted, they do not appear in the DMS–Object–Table anymore.

Hints:

- The deletion of an item cannot be undone.
- Deleting an item also removes all versions of that item.

Example

Precondition: The DMS–Object–Table is displayed.

1. Mark the document you want to delete by using the selection column.
2. Select the function *Delete* in the toolbar. A dialog window will ask you to confirm the deletion.
3. Activate the button *OK*. The selected document will be deleted.

4.3.12 Refresh

This function can be activated by clicking on the icon *Refresh* in the toolbar or in the group *Documents* of the *navigation area*.

The function *Refresh* can be used to refresh the content of your work area or the content of the group *Documents* of the *navigation area*, depending upon where you activated the function.

If you want to refresh the content of the *navigation area* click on the icon within the group *Documents* of the *navigation area*, otherwise click on the icon in the toolbar.

Example

Precondition: The DMS–Object–Table is displayed.

1. Click on the icon *Refresh* in the toolbar. The content of the DMS–Object–Table will be refreshed immediately.

4.3.13 Send to

This function can be activated by clicking on the icon *Send to* in the toolbar.

The function *Send to* can be used to send items of the DMS–Object–Table to any recipient (agent). For sending an item, a so called *Ad–Hoc–Process* is started. The items which should be send to the recipient are attached to this process.

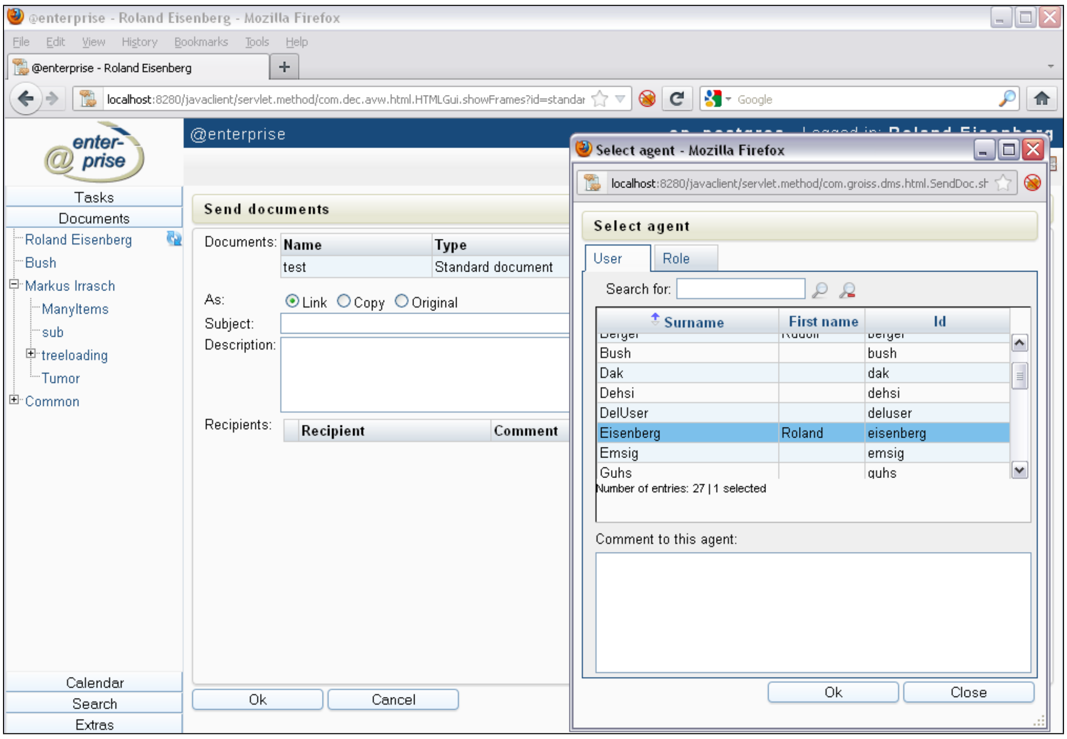


Figure 4.9: **Send documents**

Content of the HTML–page *Send To*:

- **Documents:** In this table you find all former selected documents which should be sent to some recipient(s).
- **Link/Copy/Original:** Here you can choose how the items should be attached to the new process. If you select *Link* only a link to the corresponding items will be found at the process. If you select *Copy* only copies of the corresponding items will be attached to the process. If you select *Original* and send the items, then they will be removed from their original folder. Henceforth the items can be found only with the help of the Ad–Hoc–Process.
- **Subject:** Enter here a subject for the new process, please. This text will be displayed in the column *Subject* in the worklist of the recipients.
- **Description:** Enter here a description, please.

- **Recipients:** Displays the list of recipients. This list is processed from top to bottom.
- **Add:** With the help of this button you can define recipients for the selected document(s). Clicking this button opens a new window which helps you to select users, roles etc. How this can be done is explained beneath.
- **Edit:** If you selected a recipient in the list of recipients and activate this button, then the same window is opened as if you activated the button *Add* except that the displayed properties belong to the selected recipient.
- **Delete:** Use this button to remove marked entries from the list *Recipients*.

- **Parallelism:** It is possible to forward a task to *n* different Recipients concurrently. To do this select in the list of recipients those who should get the task concurrently and activate the button *Parallelism*. The selected recipients are then also graphically centralized, so it is easy to see that those recipients get the task in parallel.

  To break up the parallelism select the recipients once more and activate the button *Parallelism*.

- **Up:** Use this button to change the order of the entries in the list *Recipients*. The marked entry will be moved up one line.

- **Down:** Use this button to change the order of the entries in the list *Recipients*. The marked entry will be moved down one line.
- **OK:** Clicking this button confirms your entries. With the now started Ad–Hoc–Process the items are sent to the recipients, where the corresponding process appears in the worklist. The DMS–Object–Table will now be displayed in your work area.

Adding a Recipient

With the help of this function new recipients can be added to the list of recipients for the selected document(s). This function can be activated by clicking on the icon *Add* next to the list *Recipients*.

After activating this function, the HTML–page *Select Agent* will be displayed in your work area.

Content of the HTML–page *Select Agent*:

- **User:** List of available users. If to much users are displayed enter the surname or id or the first letters of any of these attributes into the field *Search for* and click the button *Search*. After this only users who match with your entries are displayed in the user list. After clicking the button *All Entries* all users are displayed in the user list.
- **Role:** List of available roles.
- **Organizational unit:** The above selected role is defined in this organizational unit.

- **Comment to this agent:** Add a comment for the selected recipient. The recipient can read this comment by clicking on the corresponding info icon in the DMS–Object–Table.
- **OK:** By clicking this button you confirm your entries and the currently defined recipient is added to the list of recipients.

Example

Precondition: The DMS–Object–Table is displayed and there is at least one document in it.

1. Mark the document you want to send to another user by using the selection column.
2. Select the function *Send to* in the toolbar. The HTML–page *Send documents* is displayed in your work area.
3. Activate the button *Add*. The form *Select agent* will appear.
4. Add one or more recipients to the displayed list.
5. Activate the *OK* button. A link to the former selected document will be sent to all recipients in the recipients list. The DMS–Object–Table is displayed in your work area.

4.3.14 Start process

This function can be activated by clicking on the icon *Start process* in the toolbar. At least one item of the DMS–Object–Table has to be selected prior to activating this function.

The function *Start process* can be used to start a new process — directly from within the DMS — to which the selected items are automatically attached as documents.

Content of the HTML–page *Start process*:

- **With the following documents:** A list of documents which have been selected before activating the function *Start Process*.
- **As Link/Copy/Original:** Here you can choose how the items should be attached to the new process. If you select *Link* only a link to the corresponding items will be found at the process. If you select *Copy* only copies of the corresponding items will be attached to the process. If you select *Original* and send the items, then they will be removed from their original folder. Henceforth the items can be found only with the help of the Ad–Hoc–Process.
- **Processes of application:** Here you can filter the list of available processes by selecting a certain application.
- **OK:** Clicking this button confirms your entries, and the HTML–page *Start process* (see figure 4.10) is displayed. If you activate the function *OK* in this HTML–page the former selected process is started and the selected items are attached to it as documents.

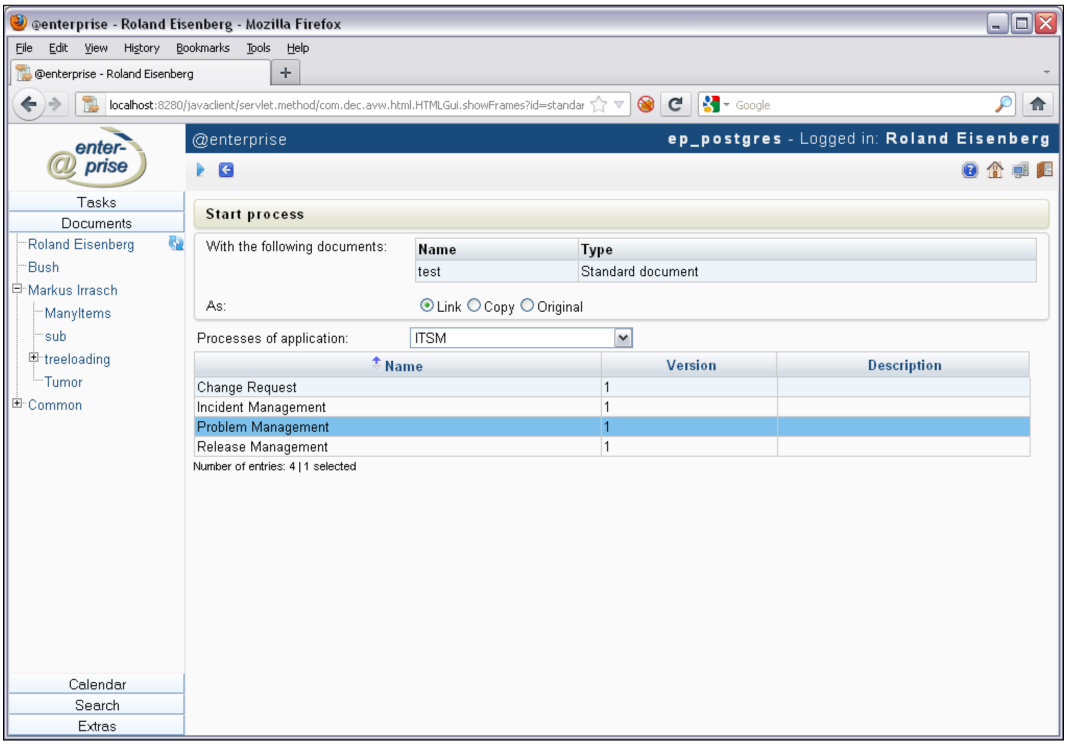


Figure 4.10: **Start process**

Example

Precondition: The DMS–Object–Table is displayed and there is at least one document in it.

1. Mark those items of the DMS–Object–Table which should be attached to the new process.
2. Select the function *Start process* in the toolbar. The HTML–page *Start process* (see figure 4.10) is displayed in your work area.
3. Select the process which you want to start and activate the button *OK*. The HTML–page *Start process* (see figure 3.6) will be displayed in your work area.
4. Activate the *OK* button. A link to the former selected items will be attached to the started process. Your personal worklist is displayed in your work area.

4.3.15 Change type

This function can be activated by clicking on the icon *Change type* in the toolbar. One item of the DMS–Object–Table has to be selected prior to activating this function.

The function *Change type* can be used to change the type of a document.

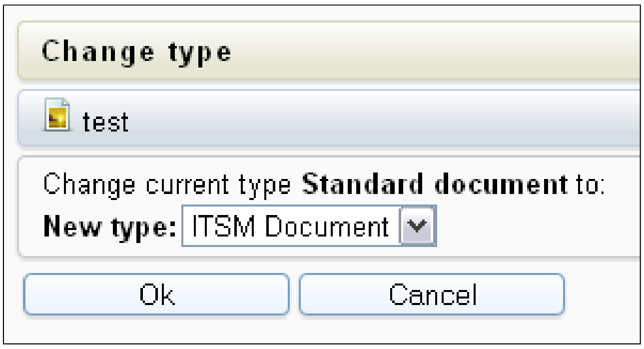


Figure 4.11: **Change type**

Content of the HTML–page *Change type*:

- **New type:** Select the type from that list which should be assigned to the document.

Example

Precondition: The DMS–Object–Table is displayed and there is at least one document in it. A alternative type for this document exists also.

1. Mark the document in the DMS–Object–Table which should be converted to another type.
2. Click on the icon *Change Type* in the toolbar. The HTML–page of figure 4.11 is displayed in your work area.
3. Select the type from the list *New Type* which should be assigned to the document.
4. Activate the *OK* button. The type of the document becomes changed and the DMS–Object–Table is displayed in your work area.

4.3.16 Replace

This function can be activated by clicking on the icon *Replace* in the toolbar. One item of the DMS–Object–Table has to be selected prior to activating this function.

The function *Replace* can be used to replace existing documents with new ones. This function does not change the name and/or extension but the content of the document. Activating this function displays the HTML–page *Replace document content* (see figure 4.12).

Content of the HTML–page *Replace document content*:

- **File:** Enter the name (including path) of the new document.
- **Browse...:** Use this button to display the dialog window *File Upload* which helps you selecting the document which should replace the current content of the document. The WFMS puts its absolute file name into the form field *File*.

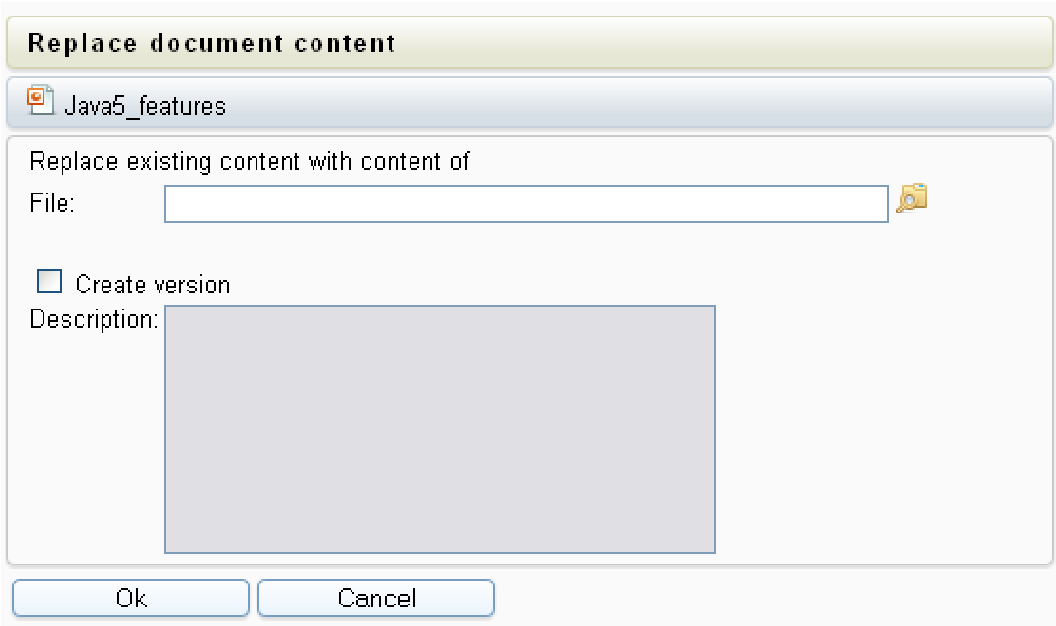


Figure 4.12: **Replace document content**

- **Create Version:** If this checkbox is ticked, a new version of the document will be created.
- **Description:** Free text.

Example

Precondition: The DMS–Object–Table is displayed in your work area and it contains a least one document.

1. Mark the document you want to replace by using the selection column.
2. Select the function *Replace* in the toolbar. The HTML–form of figure 4.12 appears in your work area.
3. Enter the absolute file name (including path) of the file whose content should replace the document.
4. Activate the button *OK*. The content of the document will be replaced by the content of the specified file. Then the DMS–Object–Table will be displayed.

Hint: If any field of the HTML–form has not been filled in, a reminder will be displayed after activating the *OK* button. In this HTML–form all fields have to be filled in.

4.3.17 Create version

This function can be activated by clicking on the icon *Create version* in the toolbar. At least one item of the DMS–Object–Table has to be selected prior to activating this function.

The function *Create version* can be used to create versions of documents. A version stores the content of a document at a given point in time. Later the content of older versions can be accessed if required.

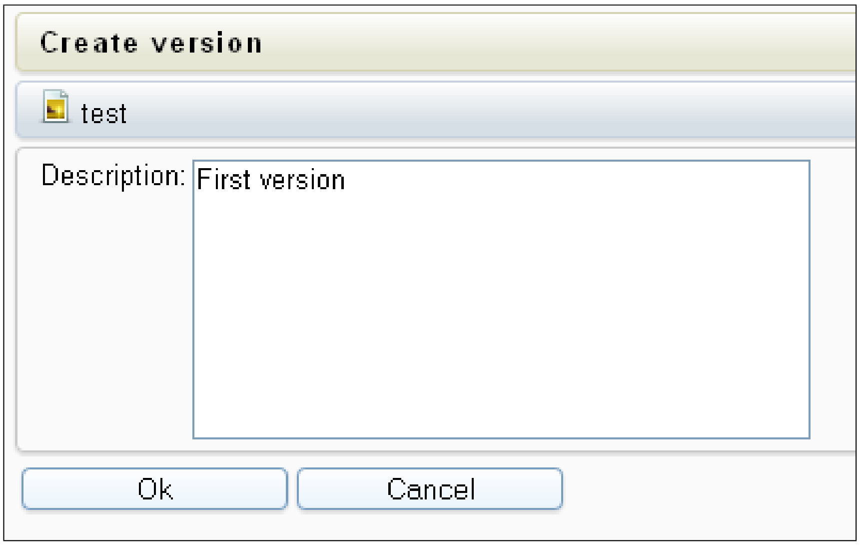


Figure 4.13: **Create version**

Content of the HTML–page *Create version*:

- **Description:** This text field can be used to enter a note for a version.

Example

Precondition: The DMS–Object–Table is displayed, and contains at least one document.

1. Mark the document you want to create the version of by using the selection column.
2. Select the function *Create version* in the toolbar. The HTML–form of figure 4.13 will appear in your work area.
3. Enter a note describing this version in the field *Description*.
4. Activate the button *OK*. A new version will be created and the DMS–Object–Table will be displayed.

Hint: For the successful execution of the function it is not necessary to fill in the description field. It is sufficient to click the *OK* button.

4.3.18 To Version Table

This function can be activated by clicking on the icon *Versions* in the DMS–Object–Table.

The function *To Version Table* can be used to display the versions of a selected entry of the DMS–Object–Table.

Figure 4.14: **Versions of ...**

Content of the HTML–page *Versions of ...*:

- **Created at:** This column shows the creation time of the corresponding version. This entry acts as a link to the version of the document. Clicking on this link opens this version of the document in the work area.

  Hint: To leave this document view and come back to the version table use the *Back* button of the browser.

- **Document:** If a version has been created for a document, a link to the document at the creation time of the version is displayed.
- **Form:** Some documents have additional metadata. Clicking the *form icon* results in displaying metadata of the document.
- **Created by:** This column lists the name of the user who created this version.
- **Description:** This column shows a description of the corresponding document version if the user who created the version entered one.
- **Signatures:** Activating this button brings you to the signature table. There you can see all signatures of the corresponding version. Additionally you can sign a already signed version by selecting the version and activating the function *sign* in the toolbar.

Example

Precondition: The DMS–Object–Table is displayed, and contains at least one document with a corresponding version.

1. Click at an entry in the column *Version* of the DMS–Object–Table. The version table is displayed in your work area.
2. Activate the button *Back*. The DMS–Object–Table is displayed in your work area.

4.3.19 Display version

This function can be activated by clicking on an entry in the column *Created at* in the version table.

The function *Display version* can be used to either display the content of a certain version of a document, or to save the version to a file system.

Hint: If the version of a document is displayed in your work area you get back to the version table by clicking the button *Back* of your browser.

Example

Precondition: The version table is displayed, and contains at least one version of a document.

1. Click at an entry in the column *Created at* of the version table. Relying on the type of the entry either the content of the version is displayed or you are asked to save the version on your local file system.
2. If the content of the version is displayed, activate the button *Back* of your browser. The version table is displayed.
3. If you are asked to save the object, select the path and file name and activate the button *Ok*. Of course you are allowed to cancel the operation by activating the button *Cancel*. In any case the version table will be displayed.

4.3.20 Delete version

This function can be activated by clicking on the icon *Delete* in the toolbar of the version table. At least one item of the version table has to be selected prior to activating this function.

The function *Delete version* can be used to delete selected versions from the version table. The request has to be confirmed in a pop-up dialog window. If the dialog is confirmed by clicking *Ok*, the version will be deleted and disappears from the version table. The button *Cancel* can be used to abort the function without deleting a version.

Hint: The deletion of a version cannot be undone.

Example

Precondition: The version table is displayed. There is one document with multiple versions.

1. Select the version icon of the document you want to delete a version of. The version table will be loaded (see chapter 4.3.18).
2. Mark the version you want to delete by using the selection column in the version table.

3. Select the function *Delete Version* in the toolbar. A dialog window will ask you to confirm the deletion.
4. Activate the button *OK*. The selected version will be deleted and the version table will be displayed.

4.3.21 Backup to version

This function can be activated by clicking on the icon *Backup to version* in the version table. One item of the version table has to be selected prior to activating this function.

The function *Backup to version* can be used to backup the content of the document to the content of the selected version. As a description for a version created in this way the string *Automatically created version* appears.

Example

Precondition: The version table is displayed. There is one document with at least one version.

1. Select the *version icon* of the document you want to backup to a certain version. The version table will be loaded (see chapter 4.14).
2. Mark the version which should replace the current content of the document by using the selection column in the version table.
3. Select the function *Backup to version* in the toolbar. A dialog window will ask you to confirm the operation.
4. Activate the button *OK*. The content of the document will be backed up to the content of the selected version and the version table will be displayed.

4.3.22 Sign version

It is possible to attach more than one signature to a version. Therefore you have to select those versions to which you want to assign a signature and then you have to select the function *Sign* in the toolbar. A HTML–page will be displayed which allows you to sign the selected version(s). Detailed information can be found under 4.3.27 at page 82.

4.3.23 Attach note

This function can be activated by clicking on the icon *Attach Note* in the toolbar. At least one item of the DMS–Object–Table has to be selected prior to activating this function.

The function *Attach Note* can be used to attach notes to items of the DMS–Object–Table.

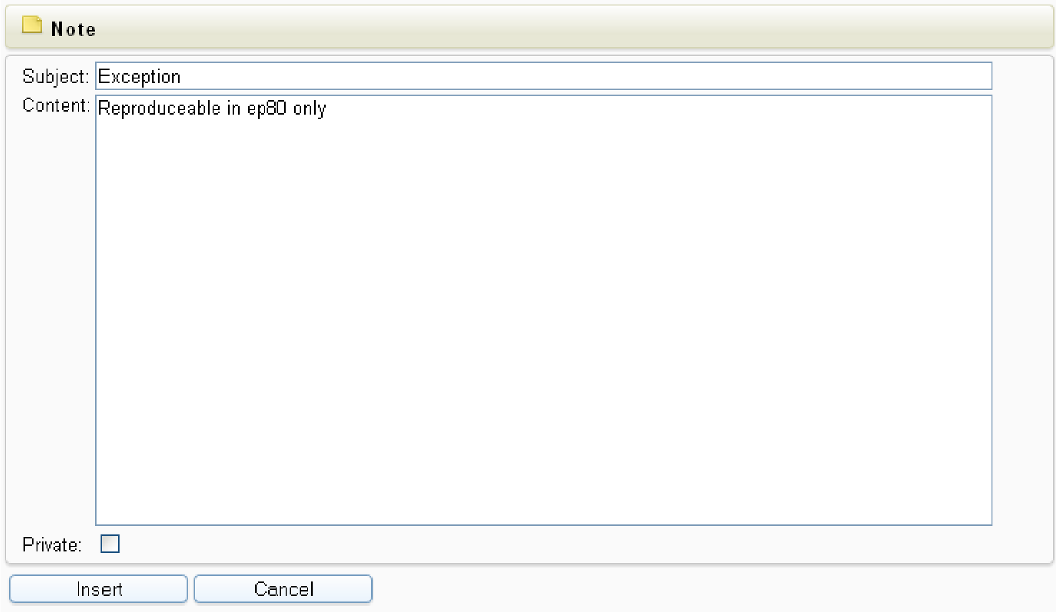


Figure 4.15: **Note**

Content of the HTML–page *Note*:

- **Subject:** Enter here the subject of the note.
- **Content:** Enter here the content of the note.
- **Private:** If this checkbox is ticked, the note can only be seen and modified by the creator of the note. This is also true, even if you send a link to the document to which you have attached a note. If you don't tick this checkbox anyone who is allowed to see the corresponding document is also allowed to see the attached note.
- **Insert:** Click on this button to confirm your entries. The new not will be attached to the document. The DMS–Object–Table will be displayed in your work area. If this was the first note you attached to the document, the icon for the function *To Note Table* appears in the DMS–Object–Table for this document.

Example

Precondition: The DMS–Object–Table is displayed, and there is at least one document in it.

1. Mark that document of the DMS–Object–Table you would like to attach a note to.
2. Select the function *Attach Note* in the toolbar. The HTML–page *Note* (see figure 4.15) is displayed in your work area.
3. Enter a subject and a content for the note.

4. Activate the *OK* button. The new note is attached to the selected document and the DMS–Object–Table is displayed in your work area. The icon for the function *To Note Table* appears in the DMS–Object–Table for this document.

Hint: If the note table is displayed in your work area you can attach a new note to the currently selected document by activating the function *New Note* in the toolbar of the note table.

4.3.24 To Note Table

This function can be activated by clicking on the icon *To Note Table* in the DMS–Object–Table.

The function *To Note Table* can be used to display the attached notes of a selected entry of the DMS–Object–Table.

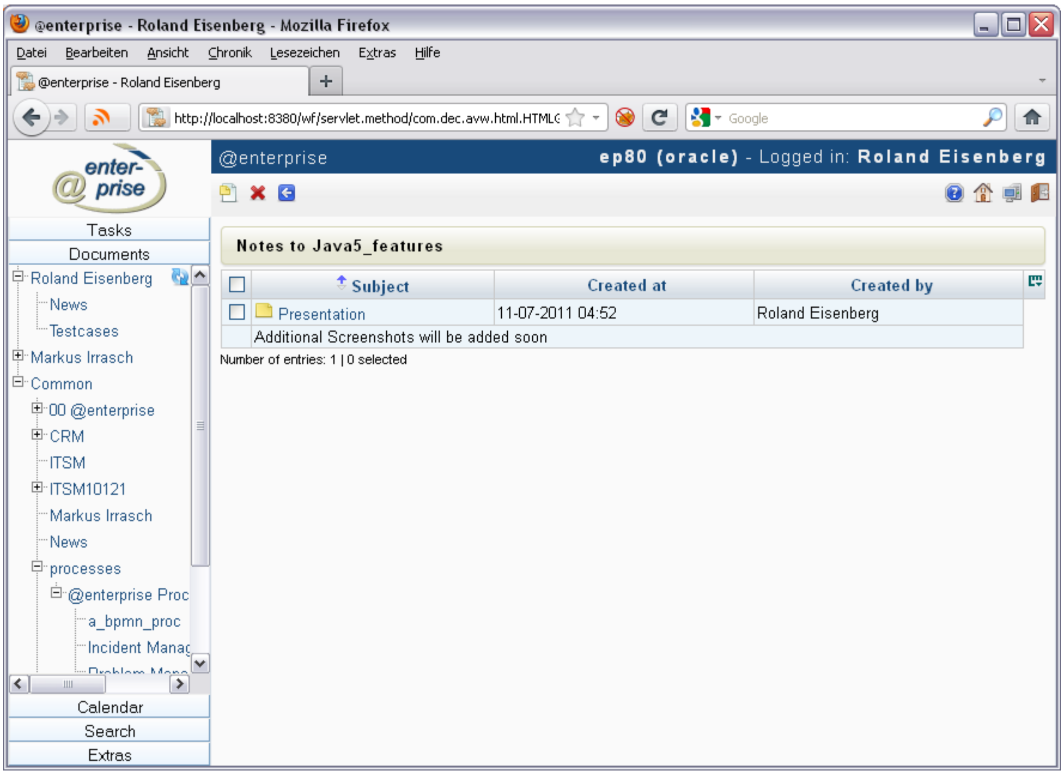


Figure 4.16: **Notes to ...**

Content of the HTML–page *Notes to ...*:

- **Subject:** This column displays the subject of a note. This allows you to identify a note easily. In this column a icon is displayed indicating the type of the note. Clicking on an entry in this column displays the HTML–page *Note* (see figure 4.15) where you can view and edit the attached note.


  - If the note is a private note, the symbol for private notes is displayed.
  - If the note is a global note, the symbol for global notes is displayed.

- **Created at:** This column lists the creation date of the note.
- **Created by:** This column displays the name of the user who created the note.
- **New note:** This function allows to add additional notes.
- **Delete:** Deletes previous selected notes.
- **Back:** Activating this function results in displaying the DMS–Object–Table again.

If the content of the note should be displayed in the table, the entry *Content* of the *Column-picker* must be checked.

Example

Precondition: The DMS–Object–Table is displayed, and contains at least one document with a attached note.

1. Click at an entry in the column *Attached Notes* of the DMS–Object–Table. The note table is displayed in your work area.
2. Activate the button *Back*. The DMS–Object–Table is displayed in your work area.

4.3.25 Display note

This function can be activated by clicking on an entry in the column *Subject* in the note table.

The function *Display note* can be used to display and/or change the content of a certain note.

Hint: If the note of a document is displayed in your work area you get back to the note table by clicking the button *Back* of your browser.

Example

Precondition: The note table is displayed, and contains at least one note to a document.

1. Click at an entry in the column *Subject* of the note table. The HTML–page *Note* (see figure 4.15) is displayed in your work area.
2. Activate the button *Back* of your browser. The note table is displayed.

4.3.26 Delete note

This function can be activated by clicking on the icon *Delete* in the toolbar of the note table. At least one item of the note table has to be selected prior to activating this function.

The function *Delete note* can be used to delete selected notes from the note table. The request has to be confirmed in a pop-up dialog window. If the dialog is confirmed by clicking *OK*, the note will be deleted and disappears from the note table and therefore is not longer attached to the current document. The button *Cancel* can be used to abort the function without deleting a note.

Hint: The deletion of a note cannot be undone.

Example

Precondition: The note table is displayed. There is one document with at least one note.

1. Mark that note of the note table which you would like to delete.
2. Select the function *Delete note* in the toolbar. A dialog window will ask you to confirm the deletion.
3. Activate the button *OK*. The selected note will be deleted and the note table will be displayed.

4.3.27 Sign

Documents, forms and notes can be signed by the user. Therefore select the required object in the DMS–Object–Table and activate the function *Sign* in the toolbar. The HTML–page *Sign* (see figure 4.17) is displayed in your work area.

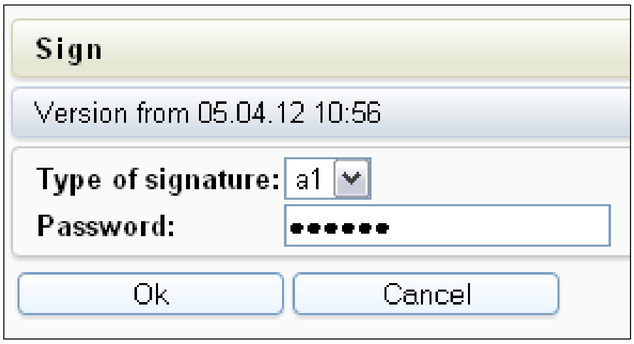


Figure 4.17: **Sign**

Content of the HTML–page *Sign*:

- **Type of signature:** If the system administrator has already defined some possible types for signatures (e.g. seen, approved, ...) you can select the required type in this field.

- **Password:** Enter here the password for your private key. It is the same password as the one you entered for the creation of your key pair.

- **OK:** By clicking this button a signature for the selected object is created. If no version of this object already exists, it becomes created. The description for such a version is *Automatically created version*. In the version table it is possible to attach further signatures to a version. This might be necessary if more than one person has to sign a document. In the version table an icon in the column *Signatures* indicates that there are existing signatures for the corresponding version.

4.3.28 Verify signatures

Of course signatures can be verified. Therefore you have to go to the version table (via the *version icon* in the DMS–Object–Table). Afterwards select a version an click on the corresponding *Signatures icon*. Now the HTML–page *Signatures of Version from ...* is displayed in your work area (see figure 4.18).

Signatures of fersion from 05.04.12 10:56

	Created at	Created by	Type of signature
○	12-04-2012 10:09	Roland Eisenberg	a1

Number of entries: 1 | 0 selected

Figure 4.18: **Table of signatures**

In order to verify a signature select the corresponding signature in the table and select the function *Verify* in the toolbar. The result of the verification process is displayed in your work area.

4.3.29 Download

This function allows to download documents from *@enterprise* to the file system of your operating system. Select one or more items and activate the button *Download*. The download starts whereas all selected documents are wrapped in a ZIP-file.

4.3.30 Folder properties

This function can be activated by clicking on the icon *Folder properties* in the toolbar.

The function *Folder properties* can be used to display and/or edit the properties of the current folder (see figure 4.19).

Content of the HTML–page *Properties of ...*:

- **Name:** The name of the folder. If you enter a value into this field and click the button *OK* you changed the name of the folder to the entered value.

- **Type:** The type of the folder.

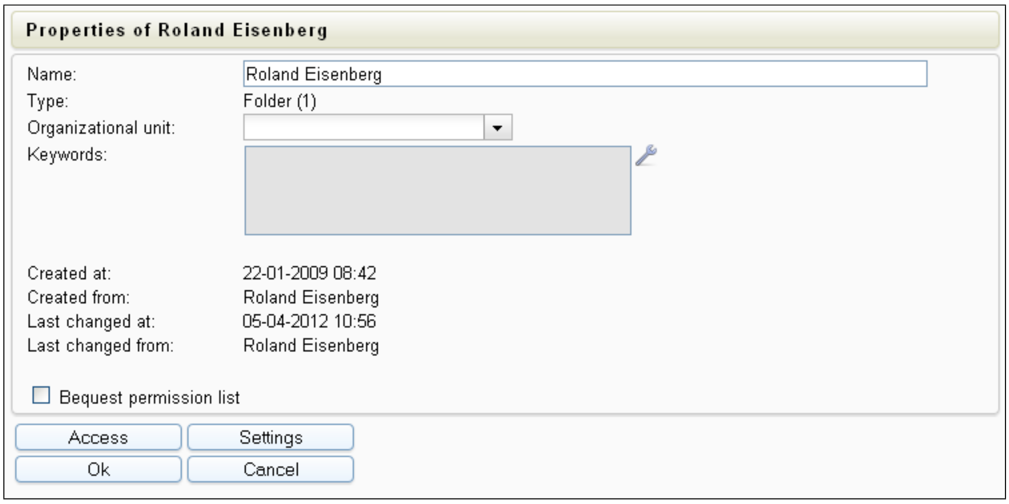


Figure 4.19: **Properties of ...**

- **Organizational unit:** Only users of this organizational unit are allowed to see the content of the folder.
- **Keywords:** It is possible to assign keywords to a folder. Then you can search after folders by typing in their keywords. In this field all keywords are shown, which are currently assigned to the folder.
- **Edit:** Clicking this button displays the HTML–page *Keyword assignment*. If you want to assign a keyword to the folder select the keyword from the list *Available keywords* and click the button . If you want to remove a keyword from the folder select it from the list *Assigned keywords* and click the button . Afterwards confirm your entries by clicking the button *OK*.
- **Created at:** Point in time when the folder has been created.
- **Created from:** The creator of the folder.
- **Last changed at:** Point in time when the folder has been amended the last time.
- **Last changed from:** User who amended the folder the last time.
- **Bequest permission list:** If this checkbox is ticked the folder bequests all its permissions to its sub folders and the items in those folders.
- **Access:** With the help of this function you can define the access rights for the folder.
- **Settings:** Clicking this button displays the HTML–page *Folder settings* (see figure 4.19) in your work area. How you can use this function is explained beneath.
- **Form:** This function allows to edit folder forms. The button is displayed only, if the current folder has a folder form. This function can be called by activating the toolbar-function in DMS table (function with action id *folderForm* must be added - see section 4.3.30).

An Example can be found beneath.

Folder Settings

This function can be activated by activating the button *Settings* in the HTML–page *Folder Properties* (see figure 4.19).

The function *Folder Settings* can be used to define

- which columns should appear in your folder in which order,
- which functions should appear in your toolbar of the folder,
- which forms are allowed or not allowed in this folder.

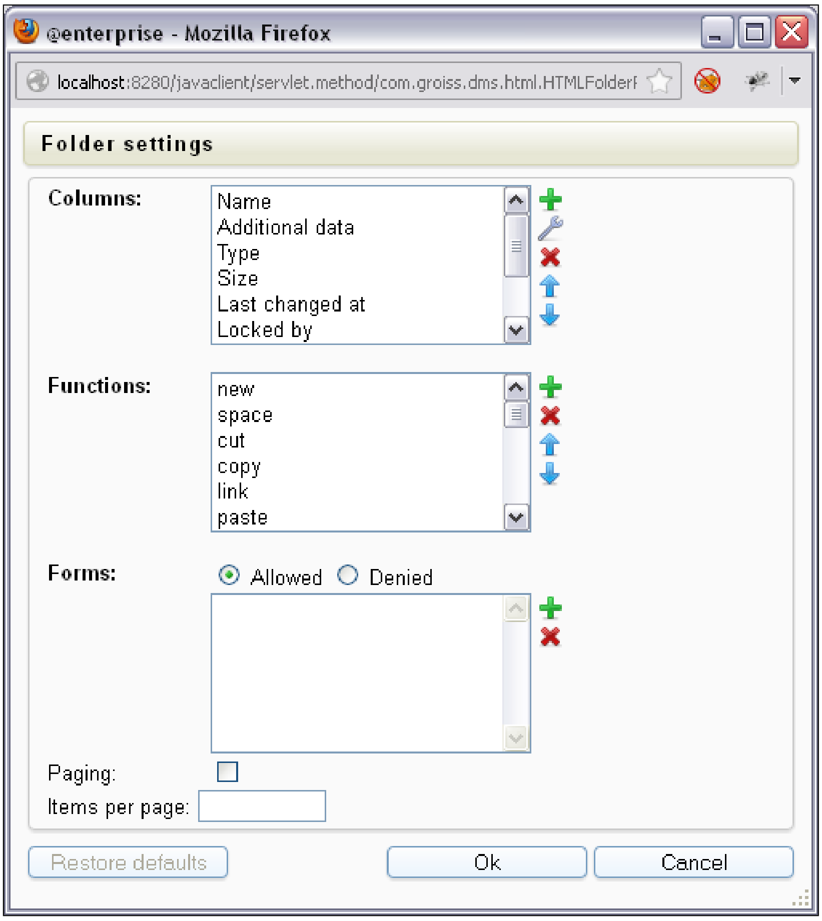


Figure 4.20: **Folder Settings**

Content of the HTML–page *Folder Settings*:

- **Columns:** Columns, which should appear in your folder

- **Functions:** Toolbar functions, which should appear in your folder
- **Forms:** Forms, which are allowed or not allowed in your folder
- **Paging:** If this checkbox is activated, the paging-mechanism of **@enterprise** is used for this folder only.
- **Items per page:** This defines the maximum number of entries in this folder table when paging is enabled.
- **Add:** Activating this button displays a HTML–page, where you can add new columns to the DMS–Object–Table of the current folder. How you can do this and other operations is explained beneath.
- **Edit:** This function is available at *Columns* only and allows to edit entries of this list (analog to function *Add*).
- **Remove:** Activating this button deletes all entries which have been selected before.

- **Up:** Activating this function moves up the selected column for one position. Because of that the *column* or *function* is moved one position to the left of the current folder.
- **Down:** Analogous to *Up*, but one position to the right.

An example can be found beneath.

Add column

This function can be activated by clicking the button *Add* beside the *Column* list in the HTML–page *Folder Settings* (see figure 4.20).

The function *Add column* can be used to add new columns to the table design for the DMS–Object– Table of the current folder.

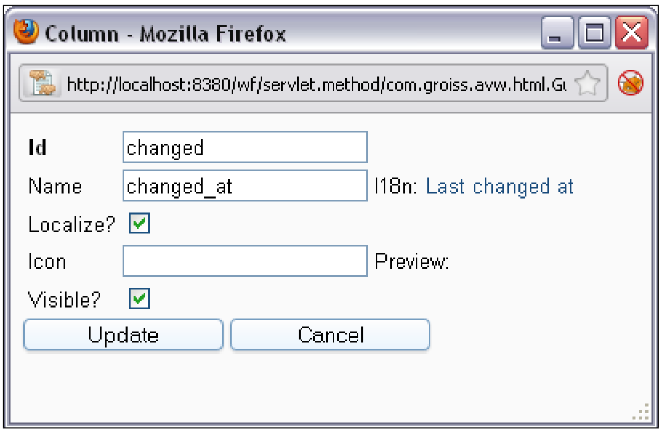


Figure 4.21: **Column**

Content of the HTML–page *Column*:

- **Id:** Here you can enter columns which are predetermined by the system, and correspond to properties of DMS–Objects.
- **Name:** The caption for the column. By activating the I18n-link beside this field, the translations (if defined in application mask - tab *Properties*) of this key are displayed and can be edited directly by changing the values and activating the button *Save*. The changes are stored in the resource file of the appropriate application (for more information see *System Administration* manual - section *Resource Editor*). This link appears only, if the current user has the right *admin* and the checkbox *Localize* is activated!
- **Localize:** If this checkbox is activated, the *Name* will be localized (if available in resource-bundle).
- **Icon:** Here you can enter a path for displaying an icon instead of the name.
- **Visible?:** If this checkbox is deactivated, the column is not visible at first time, but can be added by using the column-picker.

Add function

This function can be activated by clicking the button *Add* beside the *Function* list in the HTML–page *Folder Settings* (see figure 4.20).

The function *Add function* can be used to add new toolbar functions to current folder.

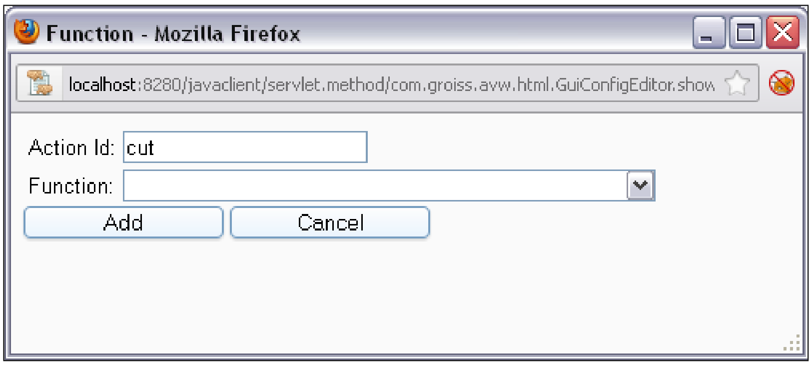


Figure 4.22: **Functions**

Content of the HTML–page *Functions*:

- **Action Id:** Enter an action key, which is defined in @enterprise (e.g. cut, insert, copy, link, paste, startProcess, etc.). It is also possible to add a quick search function by adding the id *search* which generates the input field, the functions *Search* and *All entries*.
- **Function:** A task–function can be selected here.

Add form

This function can be activated by clicking the button *Add* beside the *Forms* list in the HTML–page *Folder Settings* (see figure 4.20).

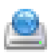
The function *Add form* can be used to add forms which are allowed or not for this folder. If the radio–button *Allowed* is activated, only these forms are selectable in dropdown-list for creating a DMS form (see section 4.3.3). If the radio–button *Denied* is activated, all forms which are not added to this list are selectable in dropdown-list.

Example

Precondition: The DMS–Object–Table is displayed and you see the content of a folder. In our example we use the folder *Common* which contains a form with a field called *subject*.

1. Navigate to the folder *Common* and activate the function *Folder properties*. The folder properties of the current folder are displayed in your work area.
2. Click the button *Settings*.
3. Click the button *Add*.
4. Enter the value *subject* into the field *Id*.
5. Enter the value *subject* into the field *Name*.
6. Activate the checkbox *Localize*.
7. Activate the button *OK*. Now the HTML–page *Table columns* is displayed in your work area.
8. Activate the button *OK*. Now the HTML–page *Properties of ...* is displayed in your work area.
9. Activate the button *OK*. Now the DMS–Object–Table is displayed in your work area.
10. At the end of the DMS–Object–Table the column *Subject* has been added.

4.3.31 Web folder



This function can be activated by clicking on the icon *Web folder* in the toolbar.

The function *Web folder* can be used to open a web folder which contains the content of your currently opened DMS folder. If you see the content of a web folder you can double click e.g. on a document within the web folder. After doing so, you can edit this document with the default application for the corresponding document type. You don't have to check out or check in a document if you want to edit it with the help of the web folder, because the web folder takes care of this.

Hint: This function is available because the check in and the check out of documents can cause some problems. This can happen because for this functions all users of @*enterprise* must have access to a directory specified in the system configuration. This might not be possible at any time, because of security reasons.

Hint: The web folder function is not supported anymore by Microsoft since Internet Explorer 8. For more information see **@enterprise FAQ** under
http://www.groiss.com/customers/faq_en.html#webdav02

WebDrive

This section explains the configuration and usage of *WebDrive* with @*enterprise* WebDAV.

After WebDrive was successfully installed, a *Site* must be deployed with following parameters (see figure 4.23):

- Site Address/URL: http://<server>:<port>/<ctx>/webdav
- Server Type: WebDav
- Drive: Drive letter, which is the root
- User: @enterprise-User
- Password: Password of @enterprise-User (Password **must** be available!)

The button *Properties* allows to define the settings for the WebDrive connection(s). After activating the button *Properties*, you have to navigate to section *Cache* and activate the option *Override global settings*. Then select the section *Options* in navigation menu and activate following parameter:

- Radio-Button *Custom - select cached options below*
- Checkbox *Cache Files*
- Checkbox *Cache Directory Listings*
- Checkbox *Flush cache files on connect*
- Checkbox *Flush directory listings on connect*

WebDrive also offers the possibility to set global Cache settings.

In section *Connections* you have to set following parameters to **1**:

- Active Connection Limit
- Active Upload Limit

Following options should be activated in section *Connections* → *HTTP Settings*:

- Always choose Basic Authentication

- Enable persistent connections (Keep-Alive)
- Enable 100-continue processing
- Do chunked upload for large files
- Enable byte ranges on GET (some servers may not handle this)
- Persist session information across all connections

In *Connections* → *DAV* the locking-mechanism can be activated (optionally):

- Enable Auto DAV locking
- Use DAV lock to check if user has Write access to file

These options should be activated in section *File*:

- Encode filenames in UTF-8 (for UNICODE support)
- Cache temporary MS Office files
- Enable NTFS file security
- Stop file downloads when the application closes the file before reading all data
- Enable Quota Processing

By the way you have to add the parameter *webdav.drive* with a drive-letter to *avw.conf* of the *@enterprise* installation and activate the checkbox *Basic-Auth in WebDAV* in *@enterprise* under *Administration* → *Configuration* → *DMS*. Finally the function *Connect* establishes a connection to the *@enterprise* server.

For further configuration parameters of WebDrive take a look in *Installation and Configuration Guide - Parameters without GUI*.

Hint: If the parameter *Maximal Number of Unsuccessful Logins till Account is Deactivated* in *Administration* → *Configuration* → *Password Policy* is set, the uncorrected logins via WebDrive will be ignored - login tries will not be counted.

After connecting with the *@enterprise* server the following content is displayed:

- Worklist
- Common
- User folder
- User folder of the substituted person

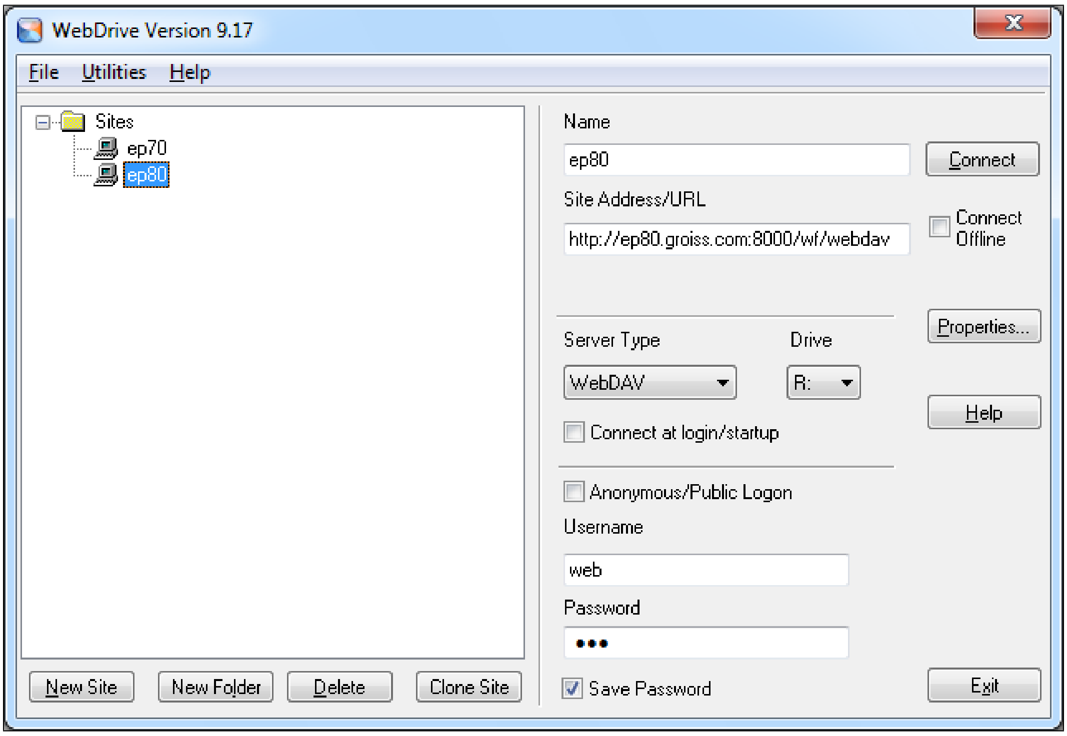


Figure 4.23: **WebDrive Connection Settings**

Each folder can be displayed by activating the function *Web Folder* in the toolbar of DMS. By setting the configuration parameters in *avw.conf* the representation of folders can be changed. The user specific parameter *WebDAV Drive* in *Extras* $\rightarrow$ *Settings* will be displayed, if the parameter *webdav.drive* in *avw.conf* is set. The value of GUI-parameter *WebDAV Drive* effects the currently logged in user only and overwrites the global parameter in *avw.conf*. It is also possible to enter the value *off* which deactivates the WebDrive functionality for the current user only. In this case the DMS can be used as usual and no WebDrive client is necessary.

Hint: It is possible that edited objects are not refreshed immediately, because WebDrive uses a cache. Activate the function *Flush Cache* of the connection and then refresh the window for getting the latest data.
WebDrive has following known restrictions:

- *Create and rename a process folder:* Process folders cannot be created and renamed. Furthermore it is not possible to create other objects like text-files.
- *Cut process folder P1 and paste it in another process folder P2:* A error message is displayed that the process folder P1 (=process) cannot be deleted.
- *Delete a process folder:* A error message is displayed that the access is not allowed (analog to Cut and Paste), but the content of the process folder is deleted!

- *Copy a process folder:* A new standard-folder is created, when a copy of process folder P1 was made in process folder P2, i.e. no copy of the process P1 is created.
- *Links:* Links created in WebDrive are lnk-files (see Windows). This kind of link is displayed in the DMS, but it is not a valid DMS-link. Links created in DMS (HTML-client, webdav-client) are displayed as ordinary folder in WebDrive, but linked with the respective object (see section 4.3.9).
Because of causing problems with links created in webdrive, we don't recommend to use it!

4.3.32 Upward

This function can be activated by clicking on the icon *Upward* in the toolbar.

The function *Upward* can be used to navigate from the current folder upward, along the folder hierarchy, to the folder above the current folder.

4.3.33 Clipboard

This function can be activated by clicking on the icon *Clipboard* in the toolbar.

The function *Clipboard* can be used to display the content of the clipboard of @**enterprise** (see figure 4.24). The clipboard is used during the execution of the functions *copy, cut, paste* and *link*. The combination of the functions *cut* and *paste* is called *move*. Thereby the selected items are put into the clipboard. Through the execution of the function *paste* the content of the clipboard is pasted into the corresponding folder and the clipboard is flushed.

The content of the clipboard changes with every execution of the functions *copy, cut, paste* and *link*. Thereby the content of the clipboard is replaced by the selected items to which the mentioned functions were applied to. Therefore it is not possible to add entries to the clipboard in multiple steps!

Hint: The system remembers by which function the item has been added to the clipboard. Through the function *paste* this function is completed. Therefore it is only possible to use items of the clipboard to create a link, if they have been added to the clipboard via the function *Link* (the same is true for the functions *copy* and *move*).

Content of the HTML–page *Clipboard*:

- **Table:** This table lists all items, which have been selected during the last execution of one of the functions *cut, copy, past* or *link*, and therefore been added to the clipboard. The clipboard may contain none, one or many entries. Columns of the table are:
  - **Name:** The name of the document.
  - **Type:** the type of the document.
- **Empty clipboard:** Clicking this button flushes the clipboard. The function cannot be undone.

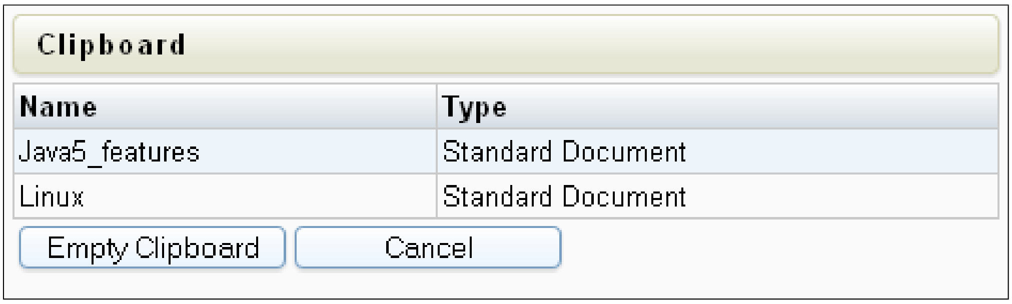


Figure 4.24: **Clipboard**

Example

Precondition: The DMS–Object–Table is displayed, and it contains at least one document.

1. Mark those documents which you would like to copy into another folder of your DMS.
2. Select the function *Copy* in the toolbar.
3. Select the function *Clipboard* in the toolbar. The clipboard is displayed and the former selected documents build the content of the clipboard.
4. Click the button *Empty Clipboard*. The clipboard is now empty.

4.3.34 Mark as processform-template

This function allows to create form templates for processes which can be selected on processstart page (see section 3.1.3 - checkbox *Show form templates*). This function is not available by default and must be added manually for each dms–folder where templates should be stored (see section 4.3.30).
After adding the toolbar-function a form-instance can be created by using the function *New* (see section 4.3.3). Select the created form in dms–table and activate the toolbar function *Mark as processform template* to get the appropriate dialog (see figure 4.25).

Content of dialog *Mark as processform-template*:

- **Available processes:** This list contains all processes, where the selected form is assigned as process form.
- **Right** and **Left:** This functions allows to add entries to the specific lists. Select an entry and activate one of this functions.
- **Attached processes:** This list contains alls processes, where the selected form should used as form template.
- **Save:** This button closes the dialog *Mark as processform-template* without saving the changes.

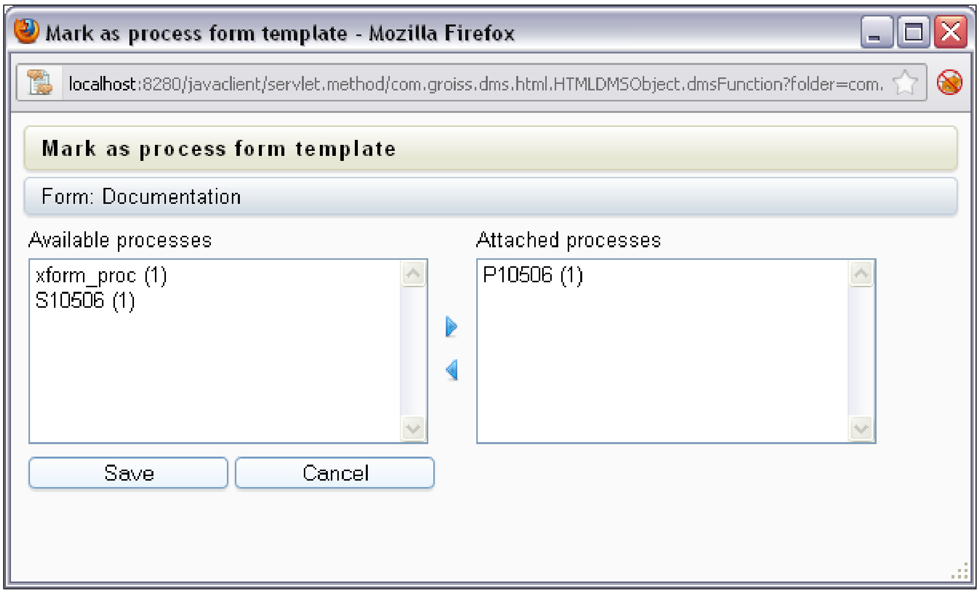


Figure 4.25: **Mark as processform template**

- **Cancel:** This button closes the dialog *Mark as processform-template* and saves the changes.

Hint Template forms can be used only, if the appropriate process form is in mode *inout* (see *System Administration Guide* - chapter *Process Definition* section *Process Properties*).

Hint Form templates are available for owners only by default. Add the right *Share* in dialog *Access* to the appropriate form instance in DMS to allow the usage for other users (see section 4.3.36). If the right *Share* is not selectable, it must be added to the formtype in administration (see *System Administration Guide* - chapter *Forms*).

4.3.35 Display DMS–Object

The function *Display DMS–Object* can be found in the column *Document name* of the DMS–Object–Table.

If you click on an entry in this column, the content of the according document will be displayed in your work area or a dialog window asks you to save the document. You then can select where to save the document.

Hint: If a document is displayed in your work area, use the browser's *Back* function to go back to the DMS– Object–Table.

Example

Precondition: The DMS–Object–Table is displayed, and there is at least one object in it.

1. Click at an entry in the column *Name* of the DMS–Object–Table. Relying on the type of the entry either the content of the object is displayed or you are asked to save the object on your local file system.

2. If the content of the object is displayed, activate the button *Back* of your browser. The DMS–Object–Table is displayed.

3. If you are asked to save the object, select the path and file name and activate the button *OK*. Of course you are allowed to cancel the operation by activating the button *Cancel*. In any case the DMS–Object–Table will be displayed.

4.3.36 To Detail View

The function *To Detail View* can be found in the column *Details* of the DMS–Object–Table.

The *Detail view* of a document shows its properties. It contains properties already shown in the DMS–Object–Table in more detail as well as additional information.

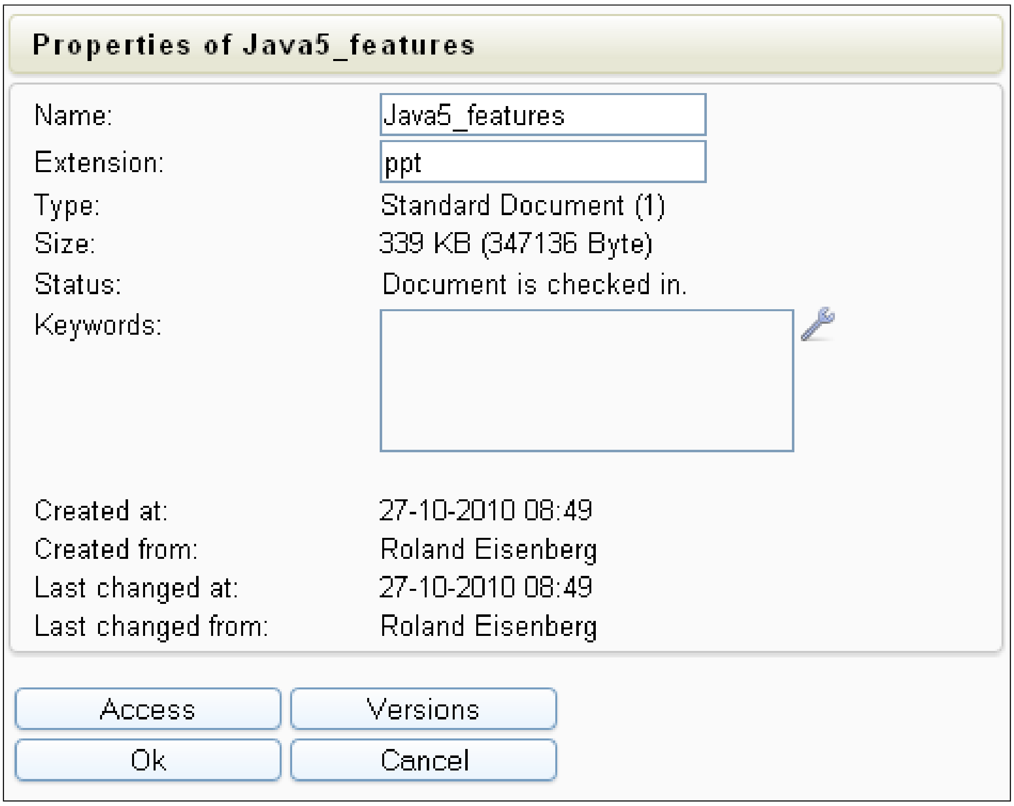


Figure 4.26: **Detail View**

Content of the HTML–page *Detail View*:

- **Name:** The name corresponds to the one in the column *Name* of the *DMS–Object–Table*.
- **Extension:** This line contains the extension of the document (e.g. *doc* or *html*).
- **Type:** The type of the document is displayed here. This information corresponds to the column *Type* in the *DMS–Object–Table*.
- **Size:** This information shows the size of the document in KB (Kilo Bytes) and in bytes. The values can be different since this size in bytes is rounded to KB. The size in KB corresponds to the column *Size* in the *DMS–Object–Table*.
- **Status:** The status of the document can be found here. A document can be *checked in* or *checked out*.
- **Keywords:** It is possible to assign keywords to a folder. Then you can search after folders by typing in their keywords. In this field all keywords are shown, which are currently assigned to the folder.
- **Edit:** Clicking this button displays the HTML–page *Keyword Assignment*. If you want to assign a keyword to the folder select the keyword from the list *Available Keywords* and click the button . If you want to remove a keyword from the folder select it from the list *Assigned Keywords* and click the button . Afterwards confirm your entries by clicking the button *Ok*.
- **Created at:** This line shows the point in time when the document has been attached to the process.
- **Created by:** The name of the user who added the document at the time described above is displayed here. If the user is not available anymore in **@enterprise**, a selection-icon appears which allows to select a new creator.
- **Last changed at:** This information corresponds to the according entry in the column *Last changed at*. It is the point in time when the document has been changed the last time.
- **Last changed from:** This is the name of the last user who edited the document at the time described above.
- **Access:** Here you can define the access rights for the DMS–Object.
- **Target Details:** This button is only available if you look at the properties of a link object. If you activate this button the properties of that DMS–Object are displayed which is referenced by the current DMS–Object.

Example

Precondition: The DMS–Object–Table is displayed, and there is at least one DMS–Object in it.

1. Click at an entry in the column *Details* of the DMS–Object–Table. The details of the corresponding DMS–Object are displayed in your work area.
2. If the content of the object is displayed, activate the button *Cancel* or the button *Back* of your browser. The DMS–Object–Table is displayed.

5 The Group Calendar

In this chapter we describe the calendar integrated in @enterprise. It can be used to administrate appointments.

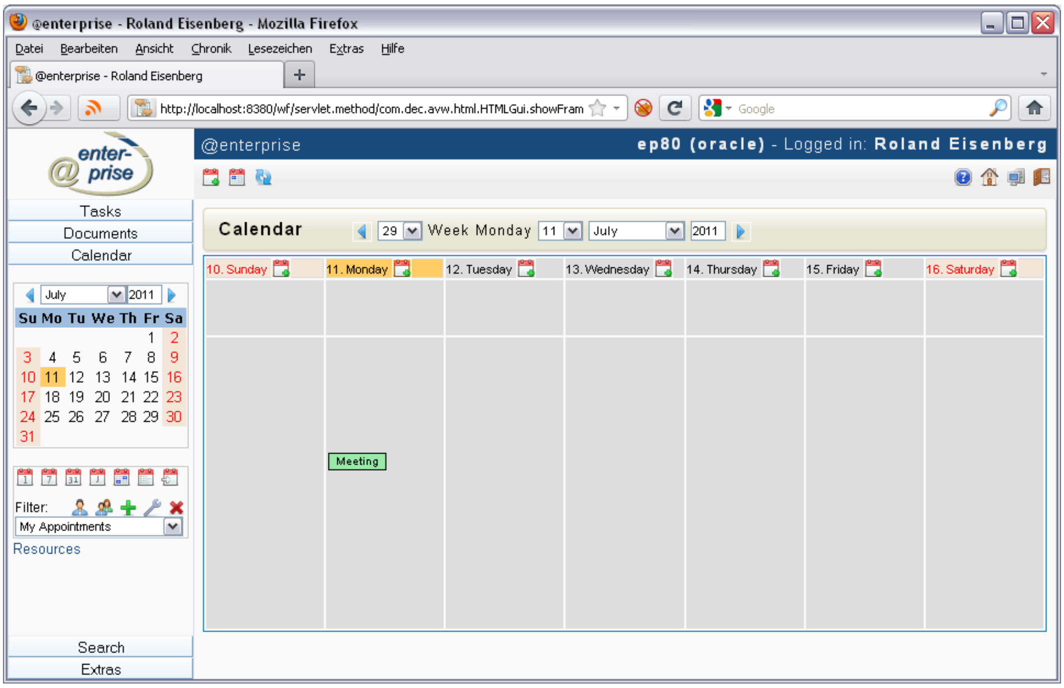


Figure 5.1: ***Calendar in @enterprise***

5.1 *Elements in the navigation frame*

The calendar of **@enterprise** is divided into the following fundamental areas:

5.1.1 The calendar mode

For selecting a time span to display following buttons exist:

-  **Day:** Views a day.
-  **Week:** Views a week.
-  **Month:** Views a month.
-  **Year:** Views a whole year.
-  **Matrix:** Views a month in compact shape. By activating the *Legend*-icon at top-right you will get an overview about the color-codes used in this view.
-  **Agenda:** Views a list of appointments started with the selected day.
-  **Import:** This function allows to import files in *iCalendar* format. You have to enter or select a file and activate the button *Import*.
-  **Today:** This function is available only, if an other mode has been selected. This function allows to jump to the current day.

5.1.2 The calendar sheet

In relation to the selected calendar mode the overview will be shown for this mode. Whole day appointments are labeled with an asterisk and shown on the top of the calendar sheet. Temporary appointments are shown at the appropriate place in the calendar sheet (see figure 5.2). Tasks with a duedate are also shown in the calendar sheet as red rectangle which contains the process-id and -subject.
If the cursor is moved over a calendar entry, additional information for this entry will be shown.

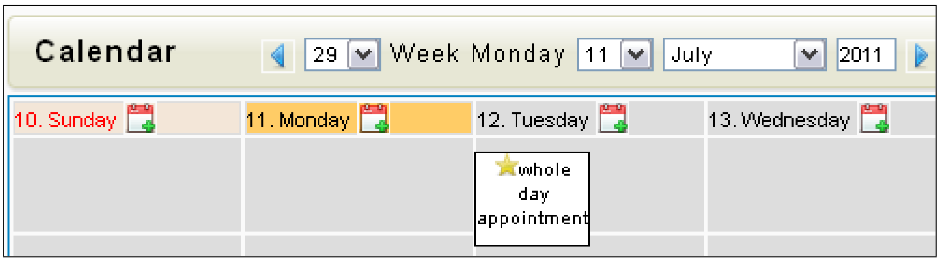


Figure 5.2: ***Whole day or rather temporary appointments***

5.1.3 Day selection

With this function it is possible to jump to any date by clicking on the date. The appointments of the selected day will be shown immediately in the calendar sheet.

5.1.4 The filter

The filter function allows you to restrict the display of calendar entries in reference to users (quick filter), department's users, departments (quick filter) and resources.
@enterprise offers following 3 pre-defined filters:

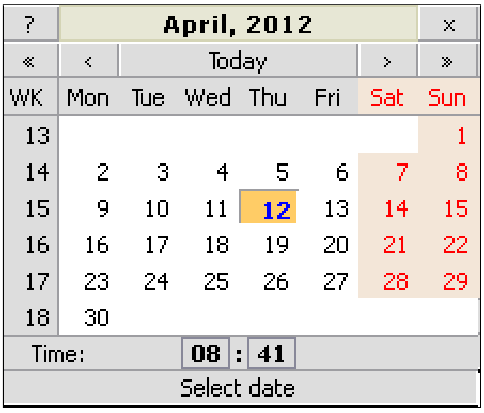


Figure 5.3: ***Day selection***

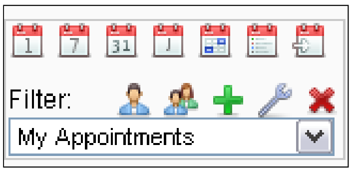


Figure 5.4: ***Calendar filter***

- *My appointments:* Shows what the name says.
- **Due tasks:** The due date of worklist entries will be shown as appointment in the calendar.
- **Finished tasks:** The finish date of worklist entries will be shown as appointment in the calendar.

There are two types of filter:

- **Temporary filter:** There are two possibilities: Click either onto the *Select user* button and select a user. Then you will see the appointments of this user. Alternatively use the button *Add filter*. Here you can select users as well as other resources. Click *Preview* when you made the selection. This temporary filter is used as long as no other filter selections have been made.
- **Permanent filter:** If you use the *Save* button in the filter definition window (see figure 5.5), the filter will be saved in the database and can be found in the filter selection list.

Define filters

By activating the icon *New Filter* a new dialog *Define Filter* will be opened, where you can define temporary or permanent filter.

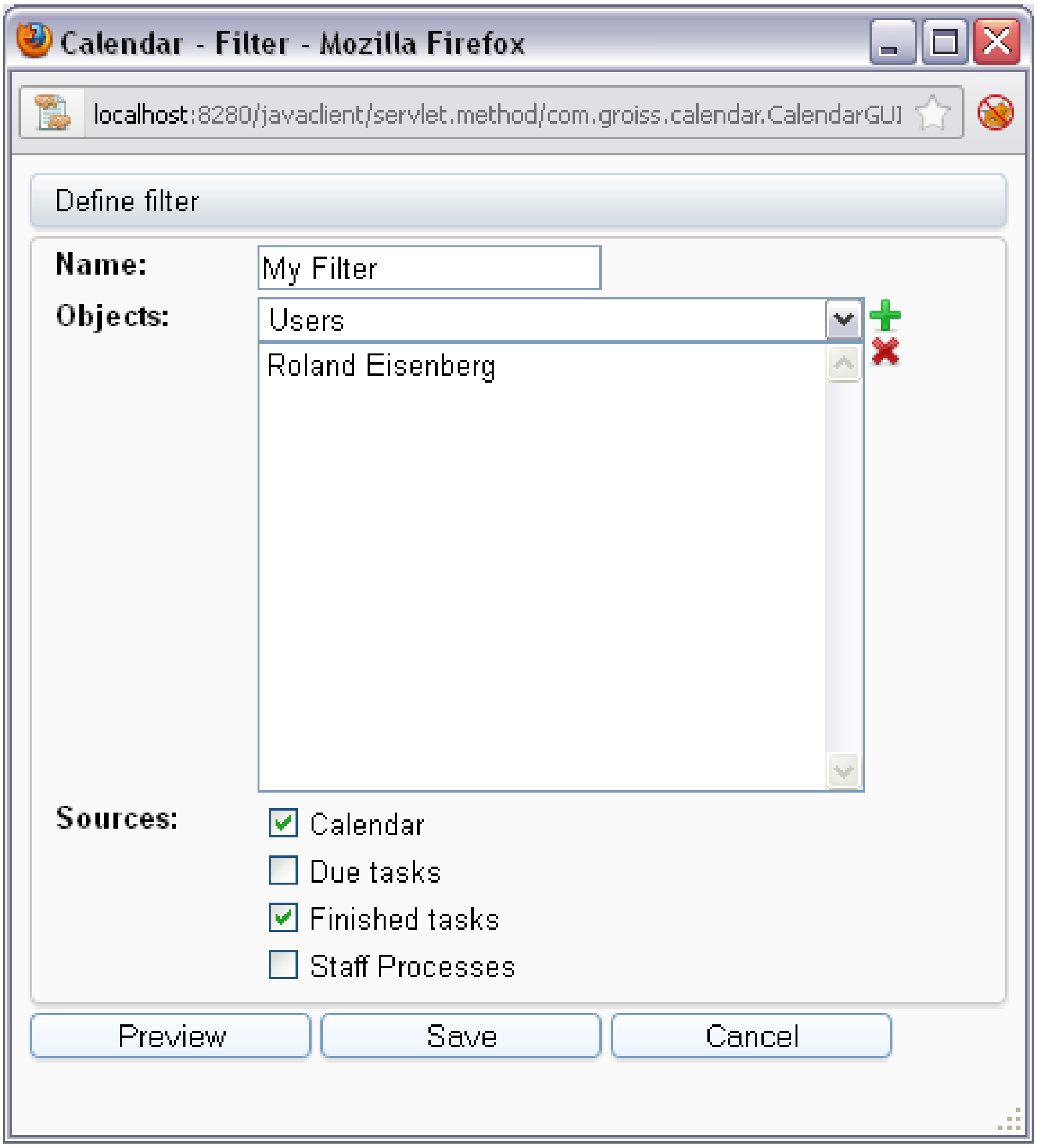


Figure 5.5: ***Define filter***

Information of the dialog *Define filter*:

- **Name:** Name of the filter, which will be displayed in the field *Filter* in the calendar.
- **Objects:** Defines, which object should be offered for the definition of a filter. You can select between three options:
  - **Users:** If you select this option and press the *Add* button, a list of users will be displayed, where you can select one.
  - **Department's users:** If you select this option and press the *Add* button, a list of organizational units will be displayed, where you can select one. Only these

entries will be added, where users have the *home*–role in this OU. Users, who will be added at a later date, are **not** considered in this filter who has the *home*–role in this OU.

  - **Organizational Units:** If you select this option and press the *Add* button, a list of organizational units will be displayed, where you can select one. The organizational unit will be added to the list (not the users (objects) of it). Users, who will be added at a later date, are considered in this filter who has the *home*–role in this OU.
  - **Resource:** If you select this option and press the *Add* button, a list of resources will be displayed, where you can select one.

  By activating the button *Delete* an object can be removed from the list.

- **Sources:**
  - **Calendar:** Defined appointments in the calendar only will be shown.
  - **Due tasks:** The due date of worklist entries will be shown as appointment in the calendar.
  - **Finished tasks:** The finish date of worklist entries will be shown as appointment in the calendar.
- **Preview:** A temporary filter will be created and the current dialog will be closed.
- **Save:** A permanent filter will be created and the current dialog will be closed.
- **Cancel:** No filter will be created and the current dialog will be closed.

5.2 Appointments

Define appointments by clicking on one of the following links:

- Toolbar entry *New date*.
- Time links in the day view.
- *New date* icon in the header of the week view.

You will see the appointment mask as in Fig. 5.6.

The mask contains the following fields:

- **Subject:** Free text. This text is shown whenever the appointment is shown in the different views.
- **Location**
- **From:** Start date (and optional time).
- **To:** End date (and optional time).

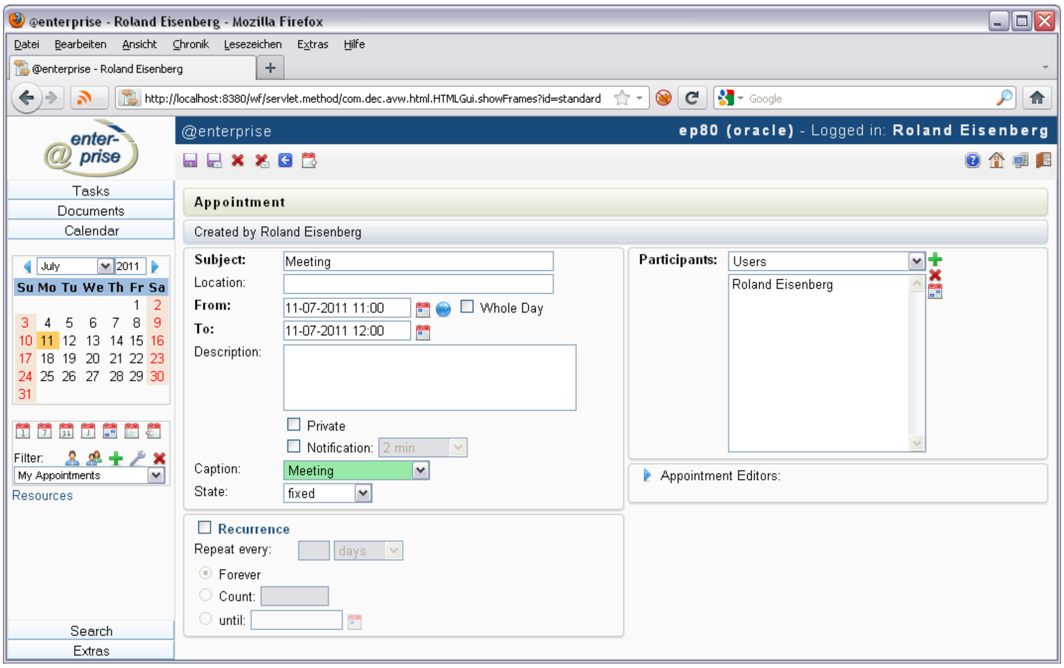


Figure 5.6: ***Appointment***

- **Timezone:** Gives you an overview of all participants, in which timezone they are and when the appointment starts .
- **Whole day:** Checks, if the appointment takes the whole day.
- **Description:** Free text.
- **Private:** Indicates a private appointment.
- **Notification:** You can define whether you want a reminder email for this appointment and how long in advance.
- **Caption:** Set a color for the appointment.
- **State:** *fixed* or *preliminary*.
- **Recurrence:** Define a recurrence interval and end date
- **Repeat every:** Define the repeat interval. The first field contains the interval between two appointments in a period. The second field contains the period.

  Furthermore there are three possibilities for repeating an appointment:

  - **Forever:** Recurrences never end (default).
  - **Count:** Repeat the appointment n times as defined in this field.
  - **until:** Repeat the appointment until this date.
- **Participants:** Select the participants for the appointment. There are three options:

  - **User**
  - **Users of Organizational Unit**
  - **Organizational Unit**
  - **Resource**
  - **Email**

- **Check Meeting Time:** Clicking this function a popup window appears, where you can select a time for the appointment. You have to enter a duration (hours or - if checkbox *Whole Day* is activated - days) and activate the button *Refresh*. The areas, where all participants have no other appointments, are shown in green color . Red color symbolizes that the user(s) have an appointment, yellow color symbolizes e.g. due tasks.

- **Appointment editors:** Define, who can edit the appointment (additional to the creator).

- **Toolbar functions:** The toolbar offers following functions:
  - *Save:* A new appointment can be inserted or an existing updated.
  - *Save and notify:* A new appointment can be inserted or an existing updated and a notification email is send to the participants. It is also possible to use the *iMIP* service (see section 5.2.1).
  - *Back:* Displays the current calendar view without inserting or changing an appointment.
  - *Delete:* This toolbar function is available for existing appointments only and deletes the current appointment entry.
  - *Delete and notify:* Analog to toolbar function *Delete*. Additionally an email notification is send to the participants.
  - *Export appointment:* The existing appointment entry can be exported (*iCalendar*)

5.2.1 iMIP-Support

In @enterprise calendar notifications contain *iCalendar*-files. iMIP offers the possibility to process status information of an appointment. The most email-clients have been integrated a calendar-tool which support iMIP (e.g. Microsoft Outlook, Mozilla Thunderbird with Lightening, etc.).
Before this function can be used it must be activated in administration (see *Installation- and Configuration-Guide* - chapter *Configuration*). Be ensure that all @enterprise-users, who want to use this function, have entered an email-address. If not only @enterprise-users should use this function, the usage of email-participants must be activated in administration.
Following the procedure of the communication:

1. An appointment with participants is created and send to all participants as iCalendar (using the toolbar function *Save and notify*). You can also use email-participants (who are not users of @enterprise).

2. The participants will get an email and can accept or reject the appointment. If a participant accept the appointment, it will be stored in the email-client and a reply-message will be send to the @enterprise mailbox (also when rejected).

3. @enterprise reads the mailbox (by using a timer) and highlights the participants, who have been accepted or rejected. A green row symbolizes that the participant has accepted the appointment, red means that the participant has rejected it. A yellow row displays that the participant has not accepted or rejected the appointment yet (see figure 5.7). Participants with wrong or not available email-address have no colored rows (white row).

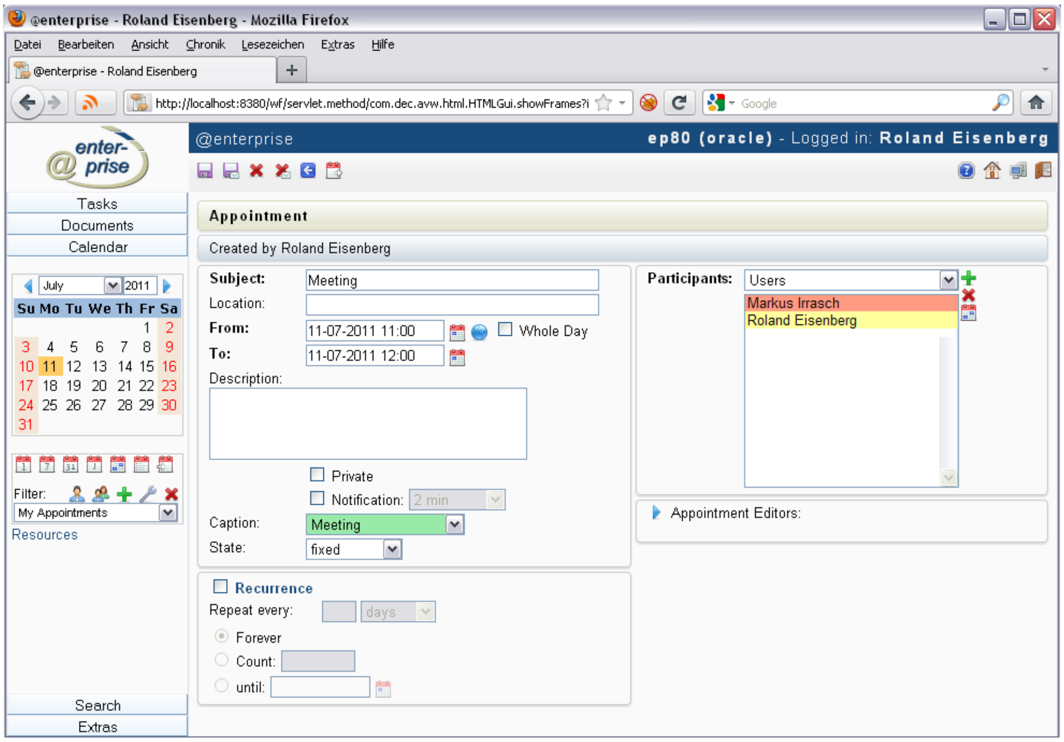


Figure 5.7: ***Appointment with iMIP***

6 The Group E-Mail

The HTML-client includes a mail-client, which can be enabled via the configuration-file *standard.xml*. This client allows to access the pre-configured mailbox (see section 8.2).

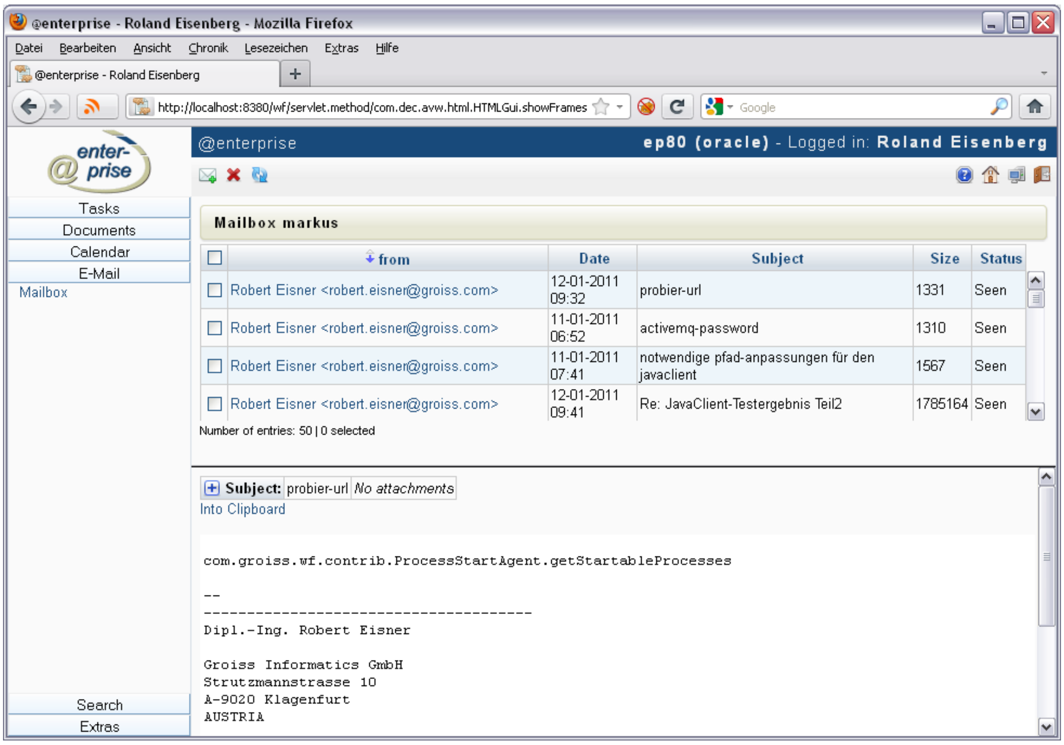


Figure 6.1: ***The mailbox of @enterprise***

6.1 The Mailbox

The mailbox offers a list of all available e-mails (see figure 6.1). By activating a link of the column *from* the detail view is displayed. This view consists of a header, which contains information like sender, subject, etc. and a body, which contains the e-mail text.

The function *Into Clipboard* puts the whole multipart-message into the clipboard. Then you have the possibility to paste the object into the DMS of @enterprise (see user manual). For copying single attachments to DMS, the corresponding symbol beside the attachment must be activated.

If you want to open the attachment, activate the corresponding link. For saving the attachment, move the mouse over the link, press the right mouse key and select the entry *Save target as*.

If the attachment is a calendar-file (*ics*-file), you can add the appointment to the calendar by activating this symbol.

The toolbar offers additional functions:

- When activating this function, a compose-window is opened, where you can write a new e-mail (see section 6.2)

- This function allows to delete the selected mails (also on the mail-server!)

- Activating this function refreshes the mailbox

6.2 TheCompose-Window

The compose-window is called by the function *Compose*. This window is structured in following parts (see figure 6.2):

- **To**, **CC** and **BCC**: Fields for recipients e-mail addresses, separated by comma.
- **Subject:** Text field.
- **Text:** Text field.

- **Insert from clipboard:** If a object has been copied in DMS, you can attach it with this function to the e-mail.
- **Load:** Here you are able to enter a path for attaching files of the file system. By activating the button *Browse* a new window will be opened, where you can select a file to attach. When selecting a file, the path is displayed in the field *path*. Then you can attach the file by activating the button *Upload*.
- **Send:** Sends the email to the entered recipient(s). A confirmation-window appears, which can be closed by activating the button *Close*.
- **Close:** Closes the window - no e-mail is send.

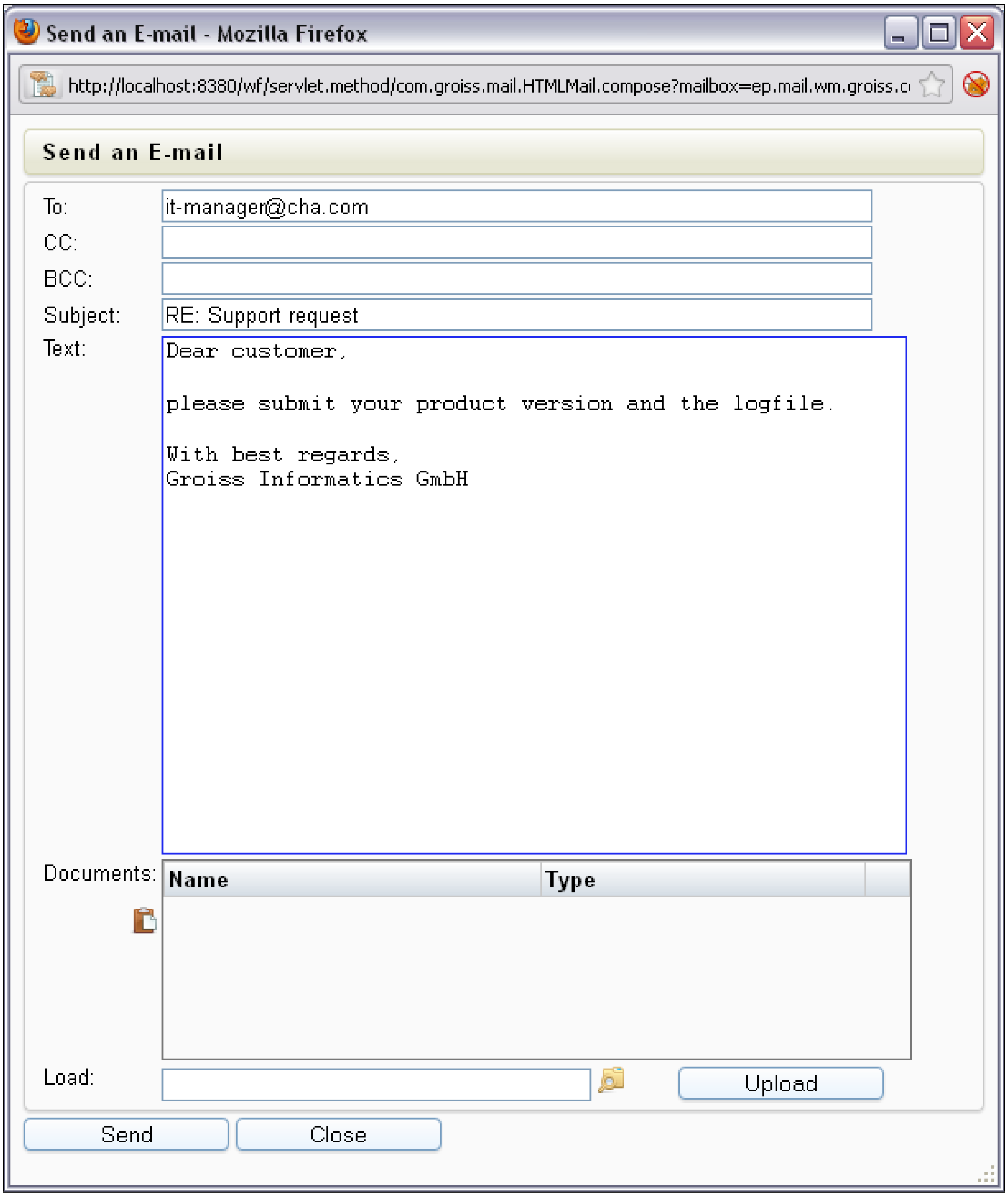


Figure 6.2: **Compose-Window**

7 The Group Search

With the links of the group *Search* you have several possibilities to filter valuable information for your company out of *@enterprise*.

7.1 Links of the group "Search"

- **Search:** If you enter a value into this field and click the button *Search* the system searches for all processes which have an id or a subject corresponding to the entered value.
- **Process search:** This function can be used to find information about process instances you are or were involved in.
- **Document search:** This function can be used to find information about DMS–Objects you work ore worked on.
- **Extended search:** This function offers extended functionality for finding process instances. This entry only appears if you have the right for doing an extended search. Detailed information about this topic can be found in the user manual *Reporting — Extended Search*.
- **Stored queries:** Here you can find statistics, which have been predefined by an administrator.Clicking the link in the column *Id* (see figure 7.1) the corresponding query is executed. The result is displayed in your work area. Detailed information about this topic can be found in the user manual *Reporting — Extended Search*.

7.2 Process Search

The process search allows you to find process instances you have been involved in as a user.

Select the function *Process search*. The HTML–page *Process search* (see figure 7.2) that can be used to narrow the search will be displayed in your work area.

The result of the search will be shown in your work area as a table (see chapter 7.2.1). The entries of this table contain links to the process history of the corresponding process instances (see chapter 3.2.18).

Stored Queries

Name	Description	Created by	Created at
@enterprise Reports			
Akteure und Anzahl der Tasks in ihren Arbeitskörben	Task:Status in (Aktiv)	Markus Irrasch	27-10-2010 04:12
All running processes exported to PDF	Alle laufenden Prozesse als PDF	Markus Irrasch	02-09-2009 07:23
Anzahl der Prozesse nach Prozesstyp		Markus Irrasch	02-09-2009 07:23
Anzahl(Prozesse) und Prozess:Start[Woche]	Keine Bedingung	Markus Irrasch	02-09-2009 07:23
Arbeitskorb eines Benutzers	Task:Status in (Aktiv) und Task:Akteur = {Parameter}	Markus Irrasch	02-09-2009 07:23
Durchschnittliche, minimale und maximale Bearbeitungsdauer aller Tasks	Task:Status in (Beendet) oder Task:Status in (Kompensiert) oder Task:Status in (Wartend)	Markus Irrasch	02-09-2009 07:23
Durchschnittliche, minimale und maximale Dauer aller beendeten Tasks.	Task:Status in (Beendet) oder Task:Status in (Kompensiert) oder Task:Status in (Wartend)	Markus Irrasch	02-09-2009 07:23
Durchschnittliche, minimale und maximale Dauer aller Tasks (ohne Wiedervorlage)	Task:Status in (Beendet) oder Task:Status in (Kompensiert) oder Task:Status in (Wartend)	Markus Irrasch	02-09-2009 07:23
Durchschnittliche, minimale und maximale Dauer der abgeschlossenen Prozesse	Prozess:Status in (Beendet)	Markus Irrasch	02-09-2009 07:23
Durchschnittliche, minimale und maximale Liegedauer aller Tasks.		Markus Irrasch	02-09-2009 07:23
Id, Name und Prozess:Alle derzeit fälligen Prozesse	Prozess:Fälligkeit bis vor exakt 0 Stunde(n)	Markus Irrasch	02-09-2009 07:23

Figure 7.1: **Stored Queries**

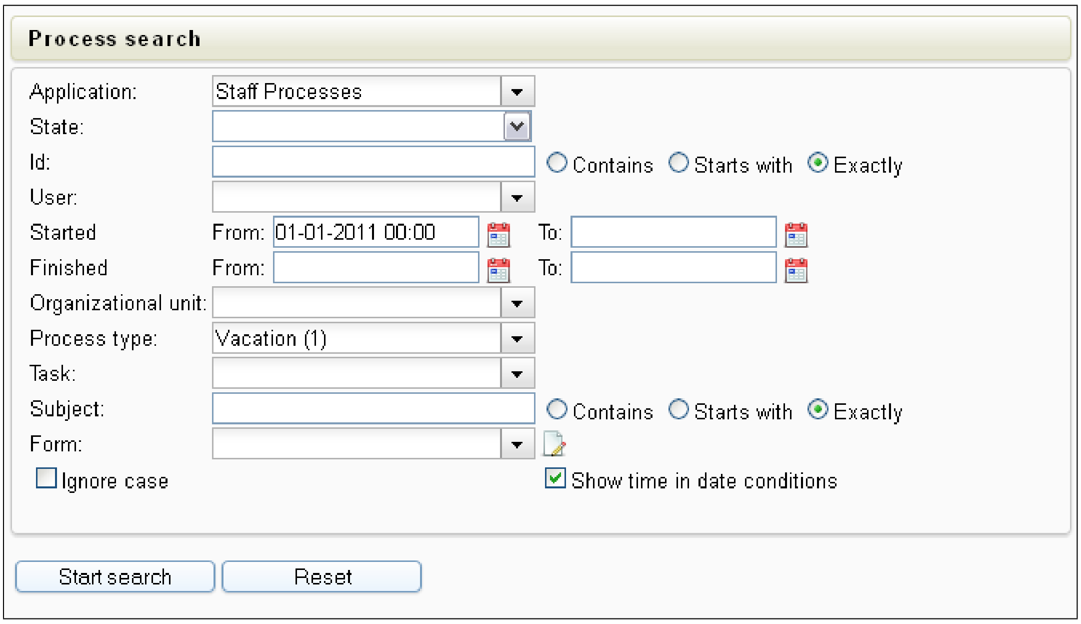


Figure 7.2: **Process Search – Search Criteria**

Content of the HTML–page *Process search*:

- **Application:** Set the application to limit the search results to process instances of this application.

- **State:** There are two ways to restrict the search on the process state:
  - *Running:* Only running process instances will be displayed.
  - *Finished:* Only terminated process instances will be displayed.
- **Id:** Here you can specify the Id of the process instances you are looking for. The Id is the unique identifier of a process instance. You can select between following search options:
  - *Contains:* The entered string is available somewhere in the id to get a result.
  - *Starts with:* The entered string has to be available at the beginning of the id to get a result.
  - *Exactly:* The entered string must be equal to the id.
- **User:** Two cases can occur:
  - If the actual user has neither the right *View Processes* nor the right *Edit processes*, the name of the actual user will be displayed in this field and cannot be modified. Therefore the user can only search for *his own* process instances.
  - If the actual user has one or both of those rights for one or multiple departments, he can specify a user here. The search will be restricted to process instances of this specified user. If the user field is not being used to limit the search to a particular user, the result will contain the processes of all users he has the *View Right* for.
- **Time–Interval:** Here you can define the time–interval in which the processes are/were active. You can choose one of the following options:
  - *Started:* Lists all process instances, which have been active within a certain period of time.
  - *Finished:* Lists all process instances, which have been finished within a certain period of time.

  The time–interval can be set using the fields *From* and *To*.
- **Organizational unit:** Here you can narrow the search to list only processes you handled within a certain organizational unit. As a default processes of all organizational units will be listed (empty field).
- **Process type:** Here you can narrow the search to list only a particular process type. As a default all process types will be displayed (empty field).

Hint: Process types depend on the previously defined application. You can select a particular version of a process type (listed with version number) or all versions (listed without version number).

- **Task:** Here you can narrow the search to list only processes with a special task being active right now (in someone's worklist). As a default all tasks are considered (empty field).

  The button *Select* can be used to search for tasks. For this purpose a search window appears.

- **Subject:** Here you can enter the subject of the process you are searching for. You can select between following search options:

  - *Contains:* The entered string is available somewhere in the subject to get a result.
  - *Starts with:* The entered string has to be available at the beginning of the subject to get a result.
  - *Exactly:* The entered string must be equal to the subject.

- **Form:** Here you can search for particular form entries.

  Select a form by using the select field. Then click the button *Edit form* to open the selected form in the new window. Here you can enter the values you are looking for. Then close the window by using the button *Apply*. An other way to add form conditions is to activate the additional function *New*, enter an attribute and value and select an operator. The condition will be added to the select-list by activating the button *Apply*. The additional functions *Edit* and *Delete* allows to adapt the form condition list.

  Only processes will be listed that have the specified form attached and the form fields match the defined values.

Hint Forms can be displayed only, if the current user has right *Searchable*.

- **Ignore Case:** Click this checkbox to do a case insensitive search.

- **Show time in date conditions:** If this checkbox is activated, the datefields *Started* and *Finished* allow to enter date and time. If this checkbox is activated by default, the global parameter *Show time in date conditions* under *Administration* → *Configuration* → *Search* is set.

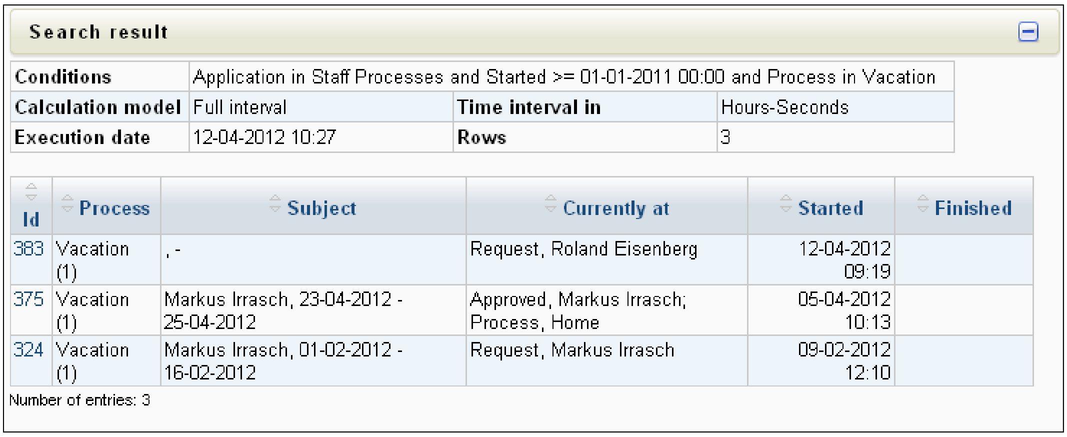
- **Start search:** After defining the search criteria, the search can be started by clicking the button *Start Search*.

  The button *Select* can be used to search for departments. For this purpose a search window appears.

- **Reset:** Use this button to reset all search criteria to their default values.

7.2.1 Search result

After defining the search criteria and activating the button *Start Search*, the search result will appear in your work area.


Search result

Conditions	Application in Staff Processes and Started >= 01-01-2011 00:00 and Process in Vacation		
Calculation model	Full interval	**Time interval in**	Hours-Seconds
Execution date	12-04-2012 10:27	**Rows**	3

Id	Process	Subject	Currently at	Started	Finished
383	Vacation (1)	, -	Request, Roland Eisenberg	12-04-2012 09:19	
375	Vacation (1)	Markus Irrasch, 23-04-2012 - 25-04-2012	Approved, Markus Irrasch; Process, Home	05-04-2012 10:13	
324	Vacation (1)	Markus Irrasch, 01-02-2012 - 16-02-2012	Request, Markus Irrasch	09-02-2012 12:10	

Number of entries: 3

Figure 7.3: **Search result**

This HTML–page (see figure 7.3) shows the search criteria, which have been used, the number of matching process instances and a list of results displayed as a table. Each row of this table contains one process instance. The columns hold the following information:

- **Id:** The Id is the unique identifier of a process instance. The Id is linked to the process history of this process instance.
- **Process:** This column shows the process type (without version).
- **Subject:** This column holds the subject of this process instance.
- **Currently at:** If the process is in the state *Running*, this column contains the current task and actor (first and last name).
- **Started:** This column displays the point in time (date and time) when the process was started.
- **Finished:** If the process is not running any more, this column contains the point in time (date and time) when the process was finished.

In the tool bar there are following functions:

- **Back to search mask:** This function is visible only when using the *Process search* or *Document search* and allows to go back to the corresponding mask.
- **Reload:** If you activate this function, the search will be executed again with the already defined search criteria.
- **New search:** If you have the required right, this button brings you to the extended search, where you can create a new query.

- **Edit query:** If you have the required right, this button brings you to the extended search, where you can edit the query.
- **Save:** By activating this button the query will be stored. Type in an *Id* and a *Name* in the dialog and then activate the button *Insert*.
- **Details of query:** This functions allows a detail view of the query in XML- and SQL-format.
- **Options of Report:** Here you can define the options of the current report (if you have the required right), e.g. if row numbers should be displayed or linked reports should be shown, etc.
- **Chart:** With this function you can export the search result by selecting one of the following export types:
  - *HTML table:* This is the default setting and shows the search result in a table on the HTML page.
  - *Chart:* This type shows the search result in the selected chart.
  - *Export to Excel:* The search result will be exported to MS-Excel. Detailed information about this topic can be found in the user manual *Reporting - Extended Search*.
  - *Delimiter Separated Values - Exporter:* With help of this export type you can export the search result in a CSV-file with the entered *Delimiter*. The delimiter is for separating the rows.
  - *XML export:* The search result will be displayed in XML-format after activating the button *OK*.
  - *PDF-Exporter:* This export type allows to show the report result in PDF format.

7.3 Document search

This function can be activated by clicking on the link *Document search* in the navigation area.

With the function *Document search* it is possible to search for DMS–Objects within *@enterprise*. With the help of the fields of the HTML–page *Document search* (see figure 7.4) it is possible to define some search criteria for the document search.

Content of the HTML–page *Document search*:

- **Document name:** The name of the document.
- **Text contains:** The text which should be contained in the form and/or document of the searched entries. For this purpose the full-text search must be activated under *Administration* → *Configuration* → *DMS* (see *Installation Guide*).
- **In document:** the content of the field *Text Contains* should be contained in the document.

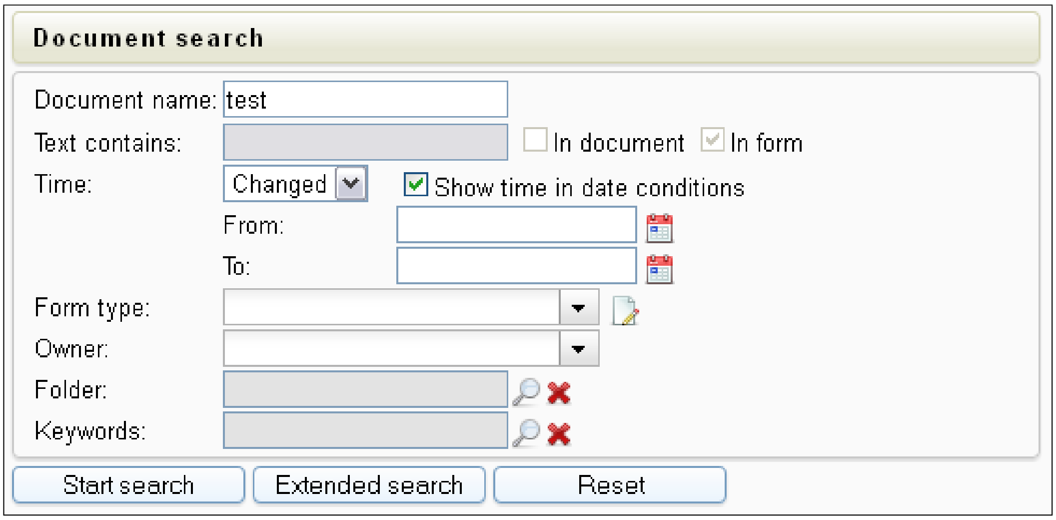
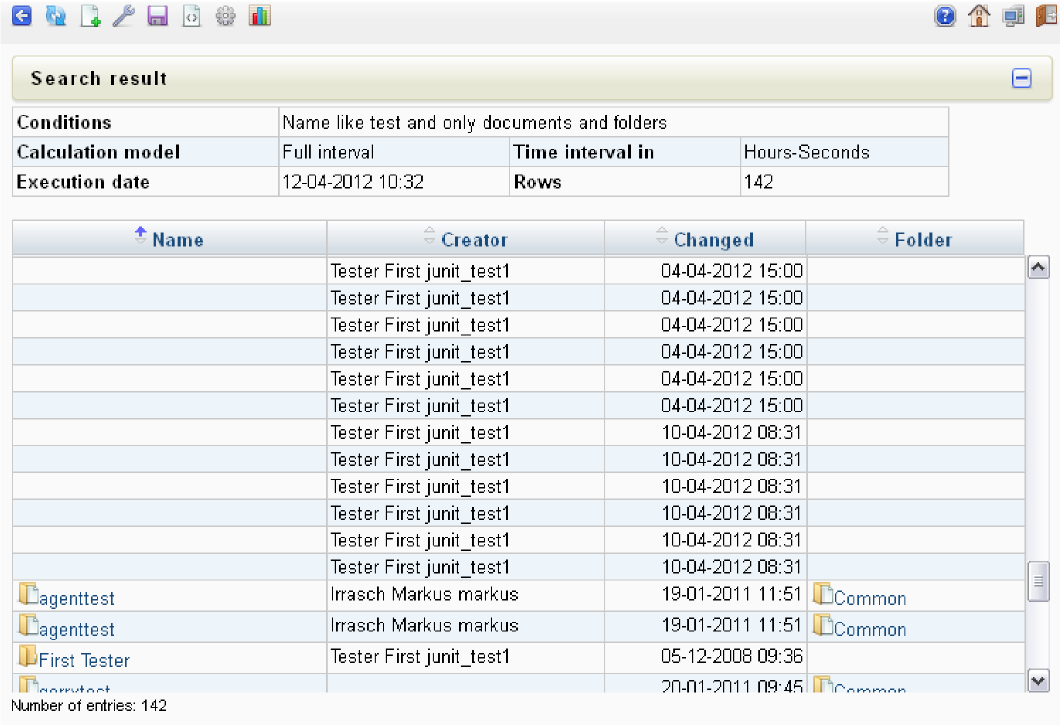


Figure 7.4: **Document search**

- **In form:** the content of the field *Text Contains* should be contained in the form.
- **Time:** Define whether the time interval, specified with the help of the fields *From* and *To*, should correspond to the point in time when the entry has been created or to the point in time when it has been changed.
- **Show time in date conditions:** If this checkbox is activated, the datefields *From* and *To* allow to enter date and time. If this checkbox is activated by default, the global parameter *Show time in date conditions* under *Administration* → *Configuration* → *Search* is set.
- **From:** Begin of the time interval selected at *Time*.
- **To:** Begin of the time interval selected at *Time*.
- **Form type:** The entries found should be of this form type (analog to section 7.2).
- **Edit:** With the help of this button it is possible to define search criteria for the field of the selected form type.
- **Owner:** The owner of the entries.
- **Folder:** Search within this folder.
- **Keywords:** Keywords which have been assigned to the folder.
- **Start search:** Clicking this button starts the document search. The result is displayed in your work area. The table of the search result is explained beneath.
- **Extended search:** Clicking this button opens the extended search. This button is only displayed if the user has the needed rights.
- **Reset:** Clicking this button resets the entries of the fields within this HTML–page to their default values or removes the entries of the fields.

7.3.1 Result of the document search

The result table of the document search is displayed in figure 7.5.



Conditions	Name like test and only documents and folders		
Calculation model	Full interval	Time interval in	Hours-Seconds
Execution date	12-04-2012 10:32	Rows	142

Name	Creator	Changed	Folder
	Tester First junit_test1	04-04-2012 15:00	
	Tester First junit_test1	04-04-2012 15:00	
	Tester First junit_test1	04-04-2012 15:00	
	Tester First junit_test1	04-04-2012 15:00	
	Tester First junit_test1	04-04-2012 15:00	
	Tester First junit_test1	04-04-2012 15:00	
	Tester First junit_test1	10-04-2012 08:31	
	Tester First junit_test1	10-04-2012 08:31	
	Tester First junit_test1	10-04-2012 08:31	
	Tester First junit_test1	10-04-2012 08:31	
	Tester First junit_test1	10-04-2012 08:31	
	Tester First junit_test1	10-04-2012 08:31	
agenttest	Irrasch Markus markus	19-01-2011 11:51	Common
agenttest	Irrasch Markus markus	19-01-2011 11:51	Common
First Tester	Tester First junit_test1	05-12-2008 09:36	

Figure 7.5: **Query result**

Content of the HTML–page *Query Result*:

- **Name:** Corresponds to the entry *Name* of the DMS–Object–Table. If you click at an entry in this column the content of the document will be displayed.
- **Creator:** The creator of the DMS–Object.
- **Changed:** Point in time when the document has been changed the last time.
- **Folder:** The DMS–Object can be found in this folder. If you click at an entry in this column you change to the corresponding folder.

7.3.2 Example

Precondition: The document search is displayed, and you have already stored some DMS–Objects.

1. Activate the link *Document search* in the navigation area.
2. Enter the name of the DMS–Object you are looking for into the field *Name*.
3. Activate the button *Start search*. The search result is displayed in your work area.

8 The Group Extras

With the links of the group *extras* you are able to handle some tasks which do not correspond to any entry of your work area.

So the group provides information about the structure of the organization and roles. Furthermore small administrative tasks like defining a substitute can be done here.

8.1 Links of the Group "Extras"

- **Settings:** User specific settings can be configured here.
- **Dashboard:** By clicking this link the dashboard of **@enterprise** will be displayed in your work area. The content of the dashboard can be defined by each user for his own needs. How you can work with the dashboard is explained in the *System Administration Manual*.
- **Set password:** Selecting this function displays the HTML–page *Set Password* (see figure 8.2). There you can change your **@enterprise**–password, which you need to login to **@enterprise**.
- **Roles:** Information about the roles you are assigned to can be found here.
- **Substitutions:** This function gives you information about who acts as a substitute for you as well as whom are you substituting.
- **Organization:** This function provides a list of all organization units and their members.
- **Page as Home:** The content of the URL which is entered into this field will be displayed on startup of **@enterprise**.
- **Password policy:** If you select this function you get some information about your password policy and you are informed about unsuccessful login attempts with your user name.
- **Style configurator:** The style configurator enables you to adapt the look and feel of **@enterprise** to your personal preferences.

8.2 *Settings*

Select the function *Settings*. The HTML–page *Settings* (see figure 8.1) will be loaded in your work area where user specific settings can be changed.

At the moment you can only change the settings *E–Mail–Notification* and *Items per Page*.

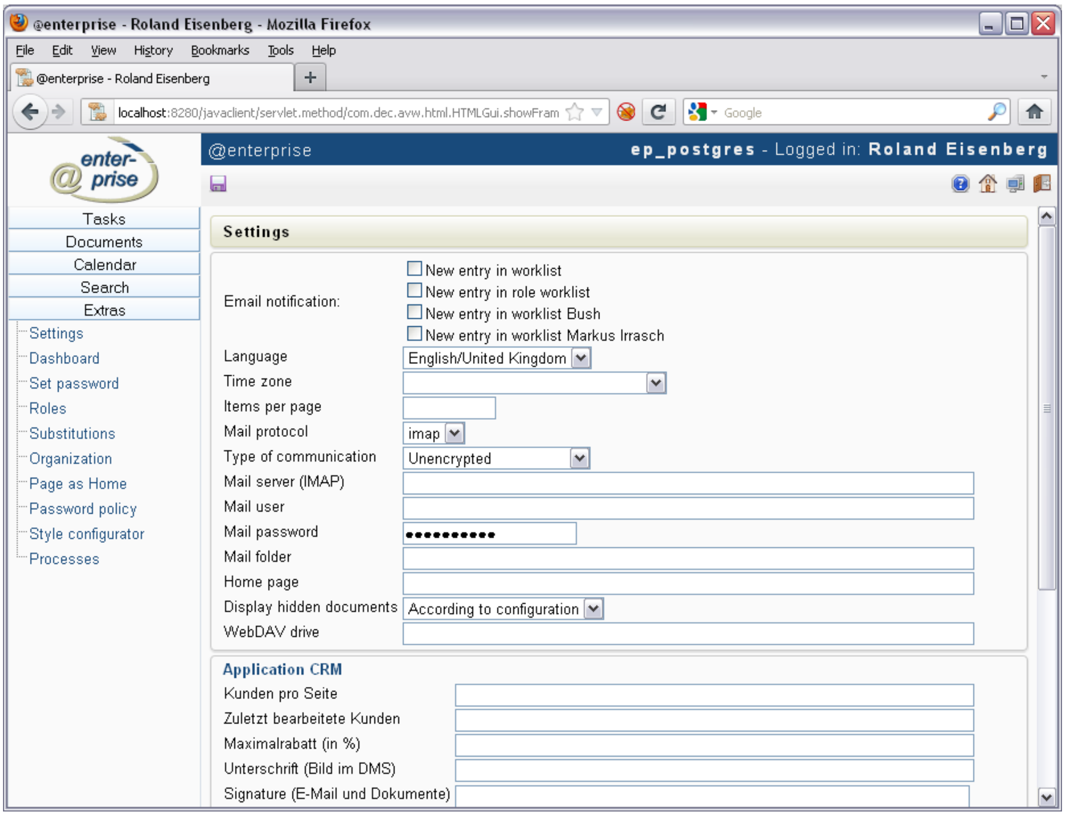


Figure 8.1: ***Settings* in Group Extras**

8.2.1 Language

The language used to display the HTML–Interface of **@enterprise**.

8.2.2 Time zone

The time zone used for your date inputs and outputs.

8.2.3 Items per page

If there are a lot of items in your worklist it may be hard to keep track of. Therefore it is possible to reduce the number of currently displayed items. If you enter a number into the field *Items per page* only as many items as you specified are displayed at the same time.

If your worklist contains more than those items you can browse through the list by activating the buttons *<, >, «, », 1, 2, 3*. In this example there are three pages containing your worklist items. By clicking the link *1* you can see the first page of your worklist, by clicking the link *2* you can see the second page, etc. So it is possible to navigate through the pages of your worklist in the following way:

- **<:** Go to the previous page.
- **>:** Go to the next page.
- **«:** Go to the first page.
- **»:** Go to the last page.
- **1:** Go to page number one.
- **2:** Go to page number two.
- **...**

8.2.4 Home page

The content of the URL entered into this field will be displayed on startup of the **@enterprise**–server. If you select the link *Page as Home* the URL of the page currently displayed will be entered into this field.

8.2.5 Email notification

You can define to get an email notification whenever a new entry appears in your personal worklist or role worklist respectively.Here you can choose one of the following options:

- **New entry in worklist:** You will receive a notification if a new entry appears in your personal worklist.
- **New entry in role worklist:** You will receive a notification if a new entry appears in your role worklist.
- **New entry in worklist *substitute name*:** You will receive a notification, if a new entry appears in the worklist of the substituted person.

Hints:

- The notification in case of new entries in the *role worklist* can lead to a large amount of emails. It should only be chosen in special cases.
- The notification works only if your email address has been entered into your account information and *@enterprise* has been configured correctly to send emails.

8.2.6 Mail client settings:

The HTML–client contains a mail–client which can access the mail box. Therefore the following settings are required:

- **Mail protocol:** Specifies the protocol used to fetch the mails from the mail server.
- **Type of communication:** Specifies the security level for the mail transfer from mail server to client. Three levels are available:
  - **Unencrypted:** The content of the mail will be transferred without encryption.
  - **Encrypted:** The mail will be SSL–encrypted. The validity of the mail server certificate will not be checked.
  - **Trusted (with certificate):** To assure a secure transmission the mail server has to authenticate itself adverse **@enterprise**. This is achieved by checking the mail server certificate. To add a new certificate for a mail server it has to be added to the key store of **@enterprise**.
- **Mail server (IMAP):** The mail server from which the mails are fetched.
- **Mail user:** The user name for the user at the mail server.
- **Mail password:** The password for the user at the mail server.
- **Mail folder:** The mail folder of the user at the mail server.

Hints: For using the clipboard-function of the e-mail-client, a temporary folder is needed. If this folder does not exist in your database, you have to execute following statement:

```
insert into avw_standardfldr
(oid, name, avwcreatedby, avwcreatedat)
values(332, ŠtmpŠ, 10, %SYSDATE%);
```

8.3 Set password

The HTML–page *Set password* enables you to set your *@enterprise*–password to a new value.

Content of the HTML–page *Set Password*:

- **Old password:** Enter the old password here.
- **New password:** Enter the new password here.
- **Confirmation:** Confirm your new password here.
- **Set password:** Clicking this button confirms your entries and therefore set your password to the value of the field *New password*.
- **Cancel:** Clicking this button ignores your entries. The HTML–page is closed and your password will not be set to the new value.

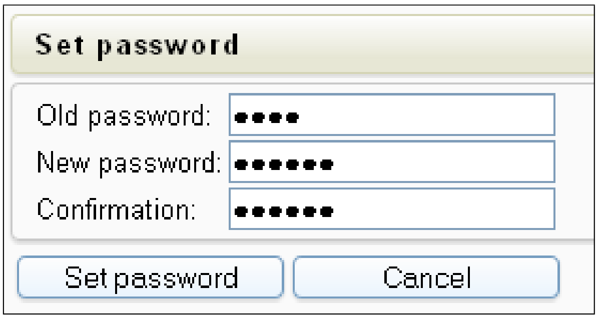


Figure 8.2: **Set password**

8.4 Roles

The function *Roles* provides information about your assignment to roles and about role substitutions which concern you.

Select the link *Roles*. The HTML–page *Role assignments for ...* (see figure 8.3), which shows your role assignments and role substitutions, will be loaded in your work area.

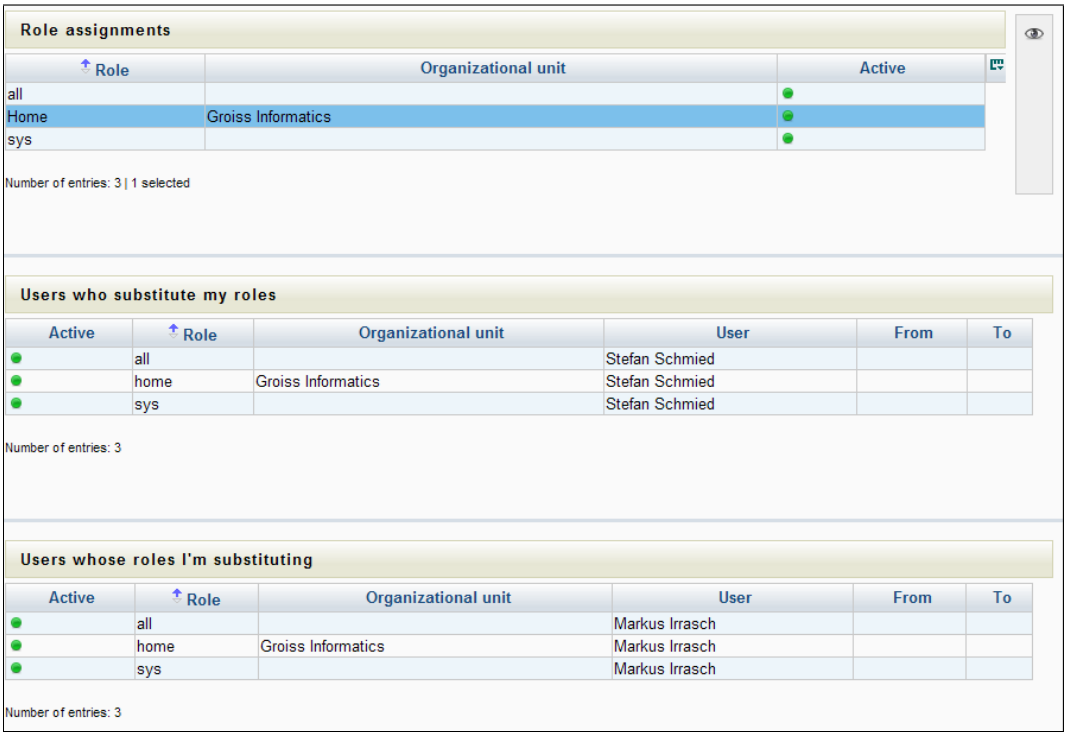


Figure 8.3: **Role assignments**

This HTML–page is divided into three sections:

1. The first section, called *Role assignments*, lists all roles you are directly assigned to.

Your role worklists contain all tasks that are assigned to those roles. This table also contains the organizational unit in which you have this role. It is also possible to define a role substitution by opening a role entry and adding a new substitution in tab *Substitutions*.

2. The second section, called *Users who substitute my roles*, lists all users, who substitute you in a certain role. If you are substituted in a certain role and a task is forwarded to this role, then this task also appears in the role worklist of your substitute.

3. The third section, called *Users whose roles I'm substituting*, lists all roles you got due to a substitution (see chapter 8.5). Tasks that are assigned to these roles will appear in your role worklist.

The table *Role assignments* contains the following information:

- **Role:** A role assigned to you.
- **Organizational unit:** The role is valid in this organizational unit.

The table *Users who substitute my roles* contains the following information:

- **Active:** Indicates, if a role is active (= green point) or inactive (= red point).
- **Role:** Name of the role your substitute have got due to his substitution.
- **Organizational unit:** Name of the organizational unit in which your substitute have got the corresponding role.
- **User:** Here you find the name of the user who substitutes you in a certain role.
- **From:** This column shows the point in time when your substitute start having the role substitution for you.
- **Until:** This column shows the point in time until when your substitute stops having the role substitution for you.

The table *Users whose roles I'm substituting* contains the following information:

- **Active:** Indicates, if a role is active (= green point) or inactive (= red point).
- **Role:** Name of the role you have got due to a substitution.
- **Organizational unit:** Name of the organizational unit in which you have got the corresponding role.
- **User:** Here you find the user whose role substitution you have got.
- **From:** This column shows the point in time when you start having the role substitution for this user.
- **Until:** This column shows the point in time until when you have the role substitution for this user.

8.5 *Substitutions*

You can assign substitutes for yourself (in case of illness, vacation etc.) for a certain period of time, i.e. you define other users as your personal substitute. Select the link *Substitutions* to show who acts as a substitute for you as well as whom you are substituting (see figure 8.4).

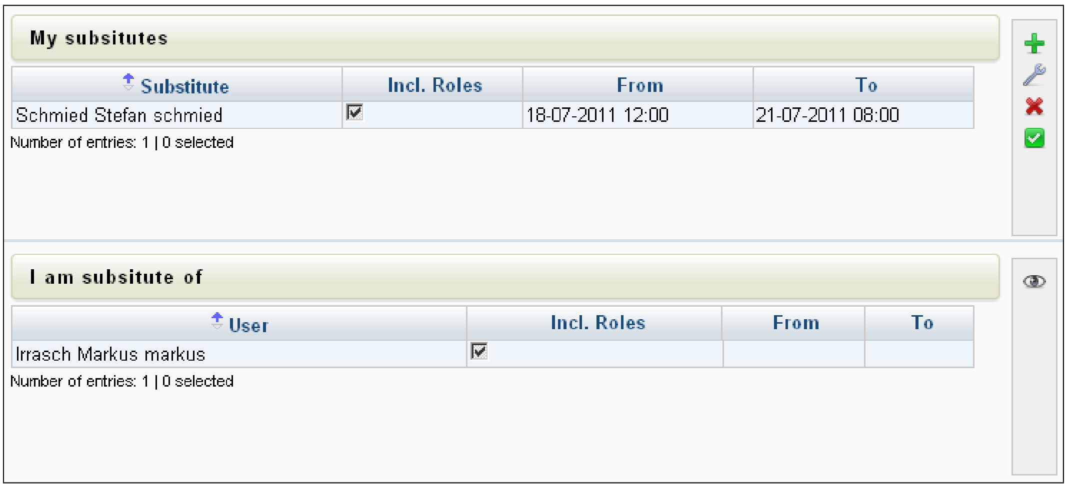


Figure 8.4: **Substitutions**

8.5.1 Presentation of the Substitutions

The HTML–page in your work area is divided into two sections:

- The first section contains your personal substitutes, i.e. all users who act as a substitute for you. You can modify the entries of this table.
- The second section contains all users you are a substitute of. The entries of this table cannot be modified by you.

Each section is displayed as a table. The rows contain users; the columns show the following additional information:

- **Substitute:** This column shows the user who acts as a substitute for you.
- **User:** This column shows the user whom you are substituting.
- **incl. Roles:** If this check box is activated the specified user will be the substitute for all your roles as well.
- **From:** This column shows the point in time (date and time) of the beginning of the substitution.
- **To:** This column shows the point in time (date and time) of the end of the substitution.

8.5.2 New Substitute

This function can be used to define new personal substitutes, i.e. you define who should act as a substitute for you.

To nominate a new substitute click on the function *New Substitute* in the toolbar. The HTML–page shown in figure 8.5 will be displayed in your work area.

Content of the HTML–Page *My Substitutes: New*:

- **User:** The current User.
- **Substitute:** To fill in the field substitute, two buttons will assist you:
  - **Select:** : Activate this button to open a search window to select a user.
  - **Delete:** Activate this button to remove the entry in the field *Substitute*.
- **Substitution incl. Roles:** If this check box is activated the specified user will be the substitute for all your roles as well.
- **From:** Here you can specify the date when the substitution starts. The calendar icon can be used to load the calendar assistant, which helps you to select the date.
- **To:** Here you can specify when the substitution ends. The calendar icon can be used to load the calendar assistant, which helps you to select the date.

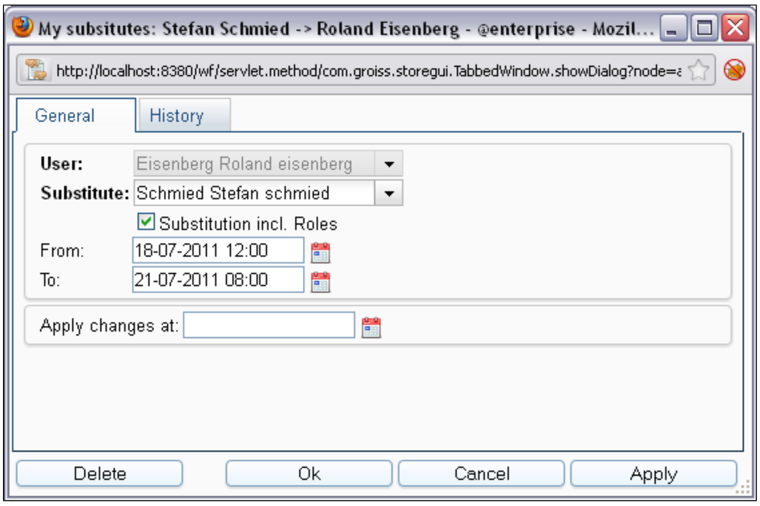


Figure 8.5: **My Substitutes: New**

- **OK:** Use the button *OK* to confirm your entries and define the selected user as your personal substitute. Clicking this button will also close the current HTML–page.
- **Cancel:** Use this button to abort the transaction. The entered data will be ignored and the HTML–page *Substitutions* will be shown.
- **Apply:** Use the button *OK* to confirm your entries and define the selected user as your personal substitute. The current HTML–page will not be closed.
- **History:** This folder contains information about the history of changes of your substitutes.

8.5.3 Delete Substitute(s)

This function can be used to delete one or more personal substitutes.

Select one or more substitutes and click the button *Delete* in the toolbar. Confirm the dialog using the button *OK* to delete the selected substitute.

8.5.4 Edit Substitute

This function can be used to modify the settings of a personal substitute. You can change the user and the period of substitution.

Select the substitute you want to modify and click the function *Edit* in the toolbar. The HTML–page, shown in figure 8.5, will appear in your work area.

8.6 Organization

Select the menu item *@enterprise* → *Organization*. The HTML–page *Organization* showing information about the organization structure will be loaded in your *work area*.

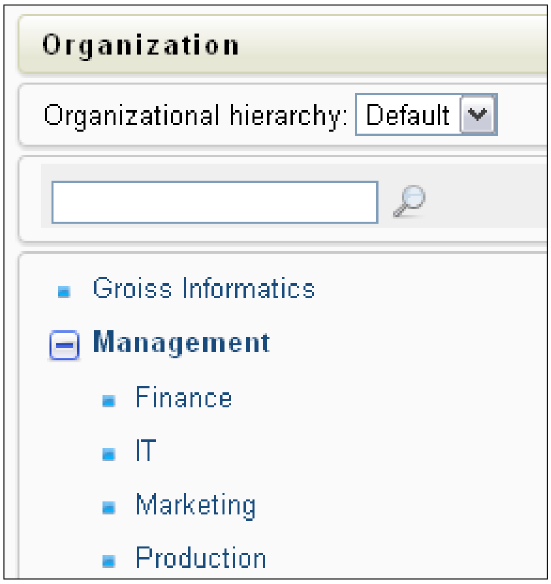


Figure 8.6: **Organization**

Content of the HTML–page *Organization*:

- **Organizational hierarchy:** Select the organization hierarchy which should be displayed in the lower part of the HTML–page.

- **Search:** By clicking the button *Select* the system starts to search for the organizational unit which has been entered into the field to the left of this button. If an organizational unit is found which's name is identical in part or whole to the entered search criteria, it is displayed in **bold** letters at the corresponding place in the organization hierarchy.

- At the bottom of this page the organization hierarchy is displayed.

Hints:

- You do not have to enter the full name of a organizational unit. It is sufficient to enter a fraction of the name with percent signs (%) used as wild cards for missing parts.

- The case of the search criteria is important. Searching for *ent%* or *Ent%* will yield to different results.

8.6.1 Organizational hierarchy

The organization structure in **@enterprise** is displayed as a so–called *organization hierarchy*. Each application has defined its own organization hierarchy.

The following symbols are used to show the organization hierarchy:

- The plus sign (**+**) is displayed in front of each organizational unit, which has subordinated organizational units that are collapsed in the actual display. Clicking on this icon will unfold the next level in the hierarchy and the plus sign (**+**) will be replaced by a minus sign (**-**).

- The minus sign (**-**) is displayed in front of each organizational unit, which has subordinated organizational units that are unfolded in the actual display. To indicate the organization hierarchy, the name of subordinated organizational units are shifted to the right. Clicking on this icon will collapse all subordinated organizational units and the minus sign (**-**) will be replaced by a plus sign (**+**).

- The dot sign (·) is displayed in front of each organizational unit that has no subordinated organizational units.

Displaying the role assignments within an organizational unit

Each entry of the organization hierarchy is a link to an HTML–page (see figure 8.7) showing some informations about the role assignments within this organizational unit.

This HTML–page is made up of two parts:

- **Role assignments:** Contains the user and the roles which are assigned to them
  - in the selected organizational unit.
  - via a role substitution of another user.
- **Roles inherited from superordinate organizational units:** Here those users and their corresponding roles are displayed which own the role in the selected organizational unit because they own the same hierarchical role in an superior organizational unit.

Content of the tables for role assignments:

- **Organizational Unit:** The selected organizational unit.
- **User:** The user who has a certain role in this organizational unit.
- **Role:** The role owned by a certain user in this organizational unit.
- **Active:**
  - *Green Point:* The corresponding role is active.
  - *Red Point:* The corresponding role is inactive.
- **Close:** Clicking the button *Close* closes the current HTML–page.

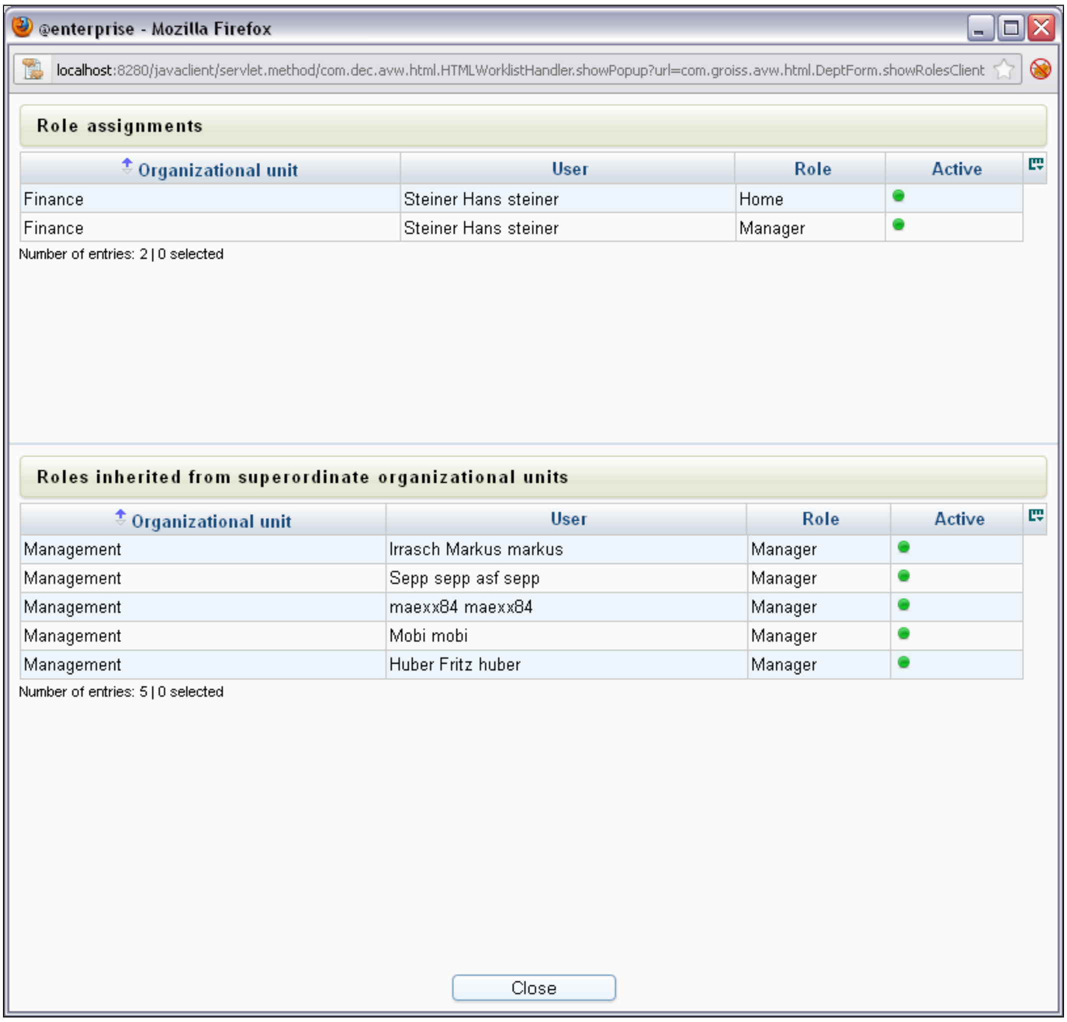


Figure 8.7: **Role assignments in an organizational unit**

8.7 *Page as Home*

If you select the link **Page as Home** the currently displayed HTML–page will be displayed on startup of the **@enterprise**–server.

8.8 *Password policy*

If you select this link you get some information about your password policy and you are informed about unsuccessful login attempts with your user name.

8.9 *Style configurator*

Following this link you come to a page where you can modify the appearance of your workflow client. you can change colors, fonts, font sizes, table shapes, etc.

You can withdraw your changes and use the default by clicking the apply button in the first tab of the style configuration (title schema).

8.10 Process cockpit

The Process–Cockpit gives an overview of the processes within the organization. It provides information about the definition and the instances of a process.

Activating the link *Processes* in the navigation tree result in displaying the overview of the cockpit (see figure 8.8).

The overview offers the toolbar function *Expand all*: This function allows to expand or retract the whole tree.

In this overview the processes are displayed in a hierarchy. Each entry of a process and some of process groups are links which are referencing to a detail page. The displayed information is defined per process or process group by the administrator of the cockpit.

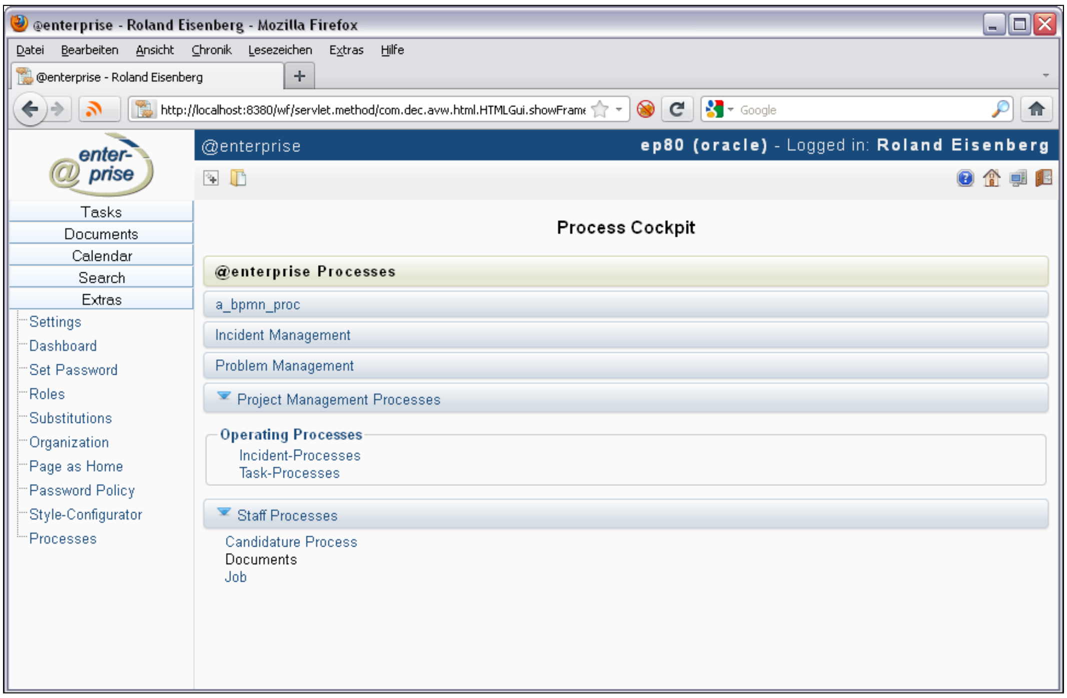


Figure 8.8: **process cockpit overview**

8.10.1 Details for process groups

Process groups can display following information:

- **Processes:** All processes which are available in this process group.

- **Reports:** All defined reports.
- **Functions:** All defined functions.
- **Links:** All defined links.
- **Documents:** All documents which are available in this folder.
- **Directly executed reports:** The result of the reports can be displayed on the detail page immediately.

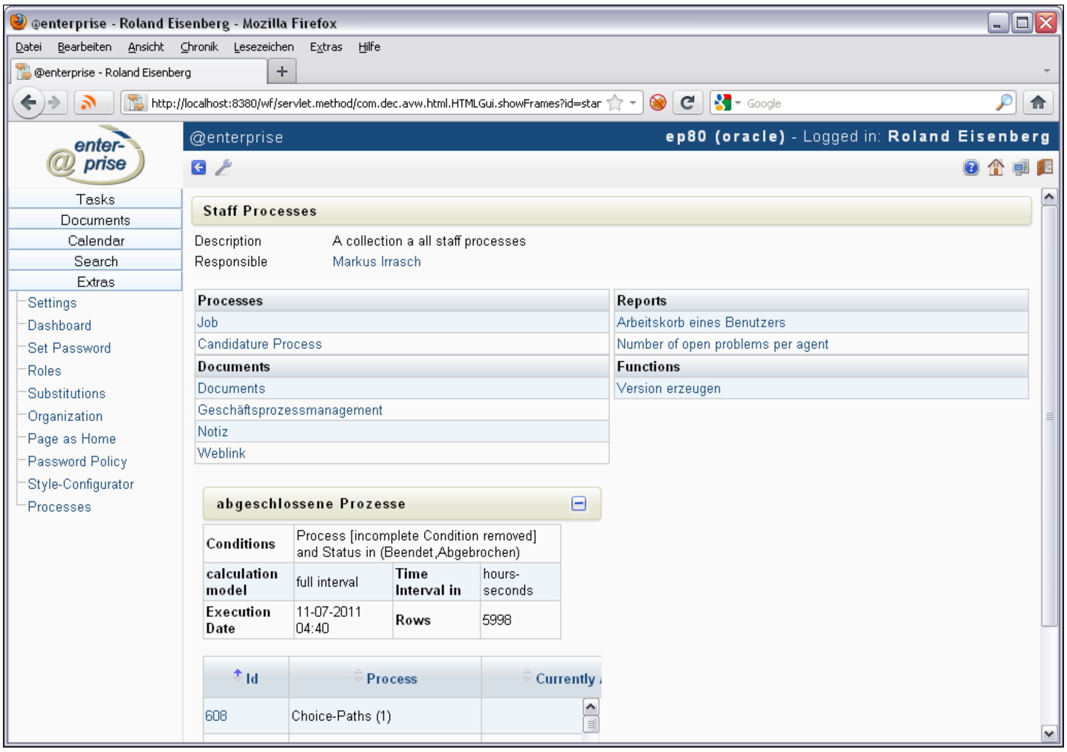


Figure 8.9: **Process group in process cockpit**

For processes additional information are available:

8.10.2 Details for processes

The page is divided into two tabs. The first tab contains the *Process Definition*, as far as available. The cockpit can also contains processes which have no direct analogy to a **@enterprise** process. In this case the tab *Definition* contains the name and the description of the process only.

The second tab *Runtime* can contain the same information like in process groups (Reports, Functions, Links, etc.), additionally an overview about the process instances. For processes with **@enterprise** process definition the instances of this definition are displayed. For processes without definition an assignment can be done by selecting a process of field *area* of a process form.

Example: The cockpit contains the processes *Employment* and *Development* which have no analogy to **@enterprise** processes. The common **@enterprise** process *Project Handling* has a process form with a field where a cockpit process can be selected. The tab *Runtime* of process *Employment* contains all instances of process *Project Handling* where the area *Employment* has been selected.

The instances contains following information:

- Running and finished instances
- Started instances of this week/month
- Deadline-Violations of the current period (configurable in the system configuration of **@enterprise**; default value is 1 year). The relative percentage of violations are displayed as weather symbols.

For each point the number is displayed plus the links to list the concrete instances. For processes with definition a link for starting new instances is displayed additionally.
The last started instances are also listed. The number of displayed instances can be defined in the system configuration of **@enterprise** (default value is five).

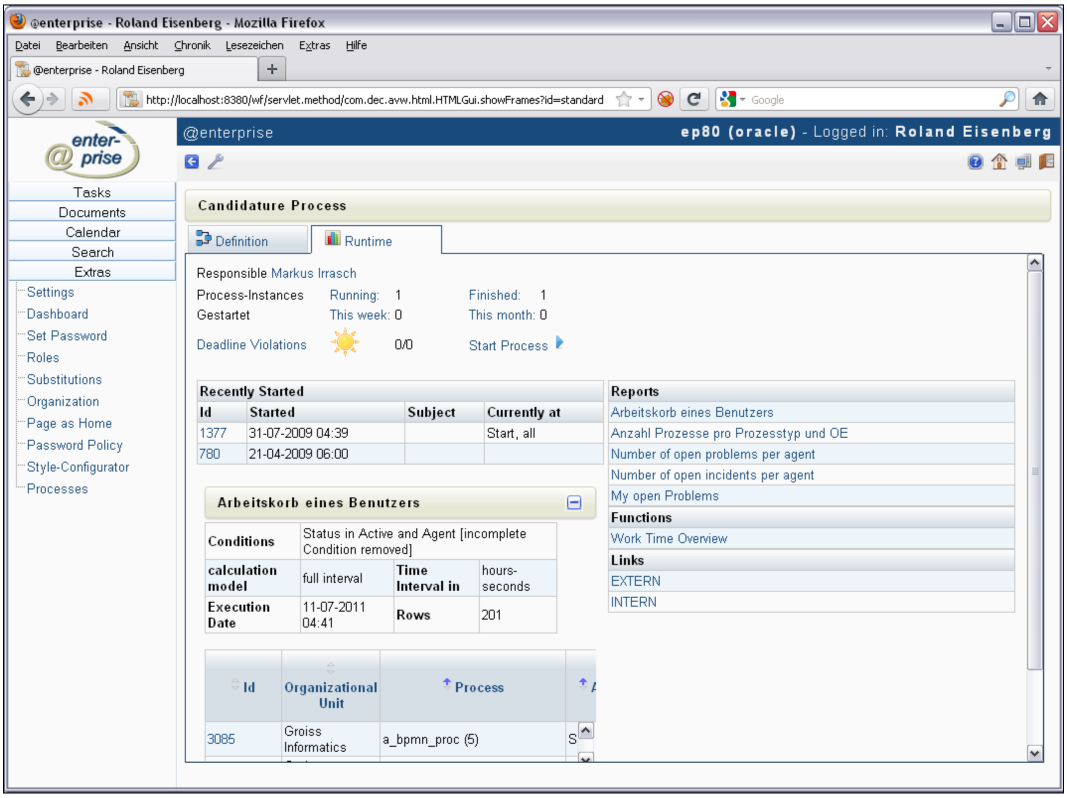


Figure 8.10: **Tab *Runtime* in process cockpit**

9 The Mobile Client

@enterprise offers the possibility to use a PDA, PocketPC or SmartPhone. The mobile version of **@enterprise** does not use frames or popups. In order to work with **@enterprise** proceed as described in chapter 2.3. Basically it is sufficient to enter the URL *http://<server>:<port>* for connecting to the server where the **@enterprise** login window will be displayed (see figure 9.1). If this way does not work, try to enter following URL for getting the login window of mobile client:
http://<server>:<port>/<context>/servlet.method/com.groiss.avw.html.MobileGui.start

Figure 9.1: ***Login window of mobile client***

After successful login the **@enterprise** main window of mobile client will be loaded. The main window is divided into following components (see figure 9.2):

- **Info bar:** This bar displays the information about the current used function. In the left corner a Back button exists which links to the parent menu.

- **Work area:** The work area is the main area, where the content of the actually selected function is displayed. After successful login the following components will be displayed in the work area:
  - **Worklist:** This area contains the worklist + user folder (see chapter 9.1)
  - **Role-Worklist:** This area contains the Role-Worklist (see chapter 9.1)
  - **Suspension List:** This area contains the Suspension List (see chapter 9.1)
  - **Start:** This function allows to start a process (see chapter 9.2)
  - **Functions:** All (task)functions of **@enterprise** are listed here (see chapter 3.2.21)
  - **Search:** Analogues to process search of **@enterprise** (see chapter 9.3)
  - **Documents:** This area contains the DMS of **@enterprise** in a simplified way. Entries of user- and Common-folder can be displayed here only, but not edited.
  - **Extras:** This area contains the functions *Set Password*, *Roles*-overview, *Time-zone*-Settings, *Substitute*-Overview and an overview of *Organizations* (see chapter 9.4)
  - **Logout:** Logs out the current user.

Figure 9.2: ***Main window of mobile client***

The navigation and user interaction is equal to the description of chapter 2.2.

9.1 Worklists

This group comprises your personal worklist, your role-worklist and your suspension list. The worklists are shown as a table (see fig. 9.3). An entry can be displayed normal or with a *red* point. A **red** point symbolizes a task, which has not been edited yet.

At the top of the personal worklist-table the user-folders are displayed (see chapter 3.2.8).

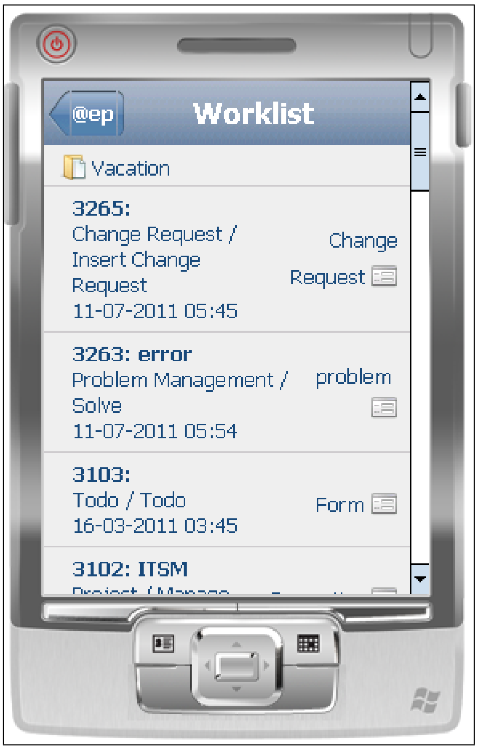


Figure 9.3: ***Worklist of mobile client***

For more details about the process instance the link of process- or task-name has to be activated. This page contains following information (see fig. 9.4):

- **Subject, Description, Task, Started, Due at:** These 5 rows contain information about the subject of the process and its description (if entered), the current task and its start- and due date (if entered).
- **Forms:** Here you find the process forms of the instance. By activating the link the form is displayed. Process forms can be also displayed by activating the form-link in worklist-overview.
- **Documents:** By activating this function a list of all attached DMS documents are shown.
- **History:** This is a simplified version of the process history described in chapter 3.2.18.

- **Process:** A graphical overview about the process is displayed (analog to chapter 3.2.19).
- **Priority:** Here the priority of the current process is displayed.
- **Folder:** This function allows to move the current task to the selected user folder. For this purpose select a folder and activate the symbol *Insert*. This function is available in worklist only!
- **Functions:** This dropdown-list contains a set of task-functions (see chapters 3.2.21 and 10.1). Select an entry and activate the symbol *Execute*.
- **Worklist functions:** For each worklist type a set of functions are available described in chapter 3.2.

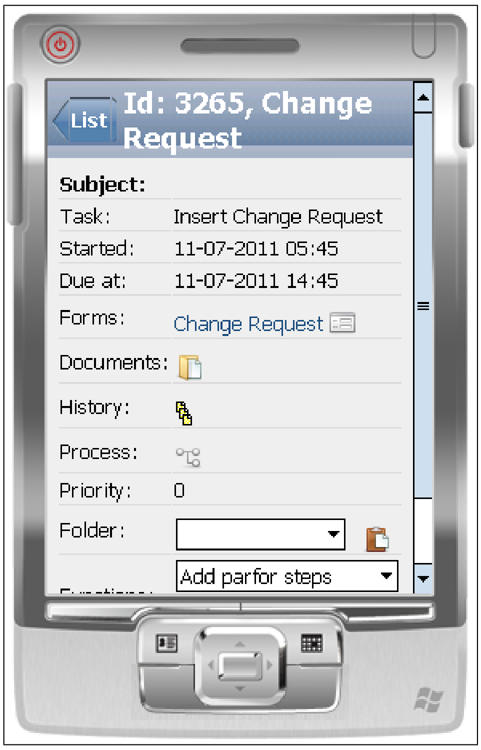


Figure 9.4: ***Detail mask of a task***

9.2 *Start process*

This link opens the process list which shows all processes you are able to start (see fig. 9.5). You can start all those processes in which you are entitled to handle the first task (e.g. because you are member of the role associated with the first task).
By activating a link of the list the process start form of the selected process will be displayed (see figure 9.5). The information of this form is analog to process start form described in chapter 3.1.3:

- **Duedate:** Set the date by which the process should be finished. The calendar icon must be used to set the date, the time can be entered manually.
- **Priority:** The priority of the process instance can be defined here.
- **Description:** Enter a description for the process instance.
- **Start:** If this button is activated, the process will be started.
- **Cancel:** If this button is activated, the process list will be displayed again.

Figure 9.5: ***Process start form in mobile client***

9.3 Search

The mobile client offers the possibility to search for all processes of **@enterprise**. The search criterias are analog to process search described in chapter 7.2:

- **Application/Processes:** This list allows to search for all processes of an application by selecting the application or one process only.
- **Status:** Selection between process instance state *Running* or *Finished*
- **Started from/to:** Here you can define the time-interval in which the processes are/were active. Timer-intervals must be set by using the calendar icon.

- **Finished from/to:** Here you can define the time-interval in which the processes are/were finished. Timer-intervals must be set by using the calendar icon.
- **Id:** Here you can specify the exact Id of the process instance you are looking for.
- **Subject:** Here you can enter the exact subject of the process you are searching for.
- **User:** Current user is pre-filled or a user can be selected.
- **Search:** After defining the search criteria the search can be started by clicking this button.
- **Cancel:** Activating this button results in displaying the previous page.

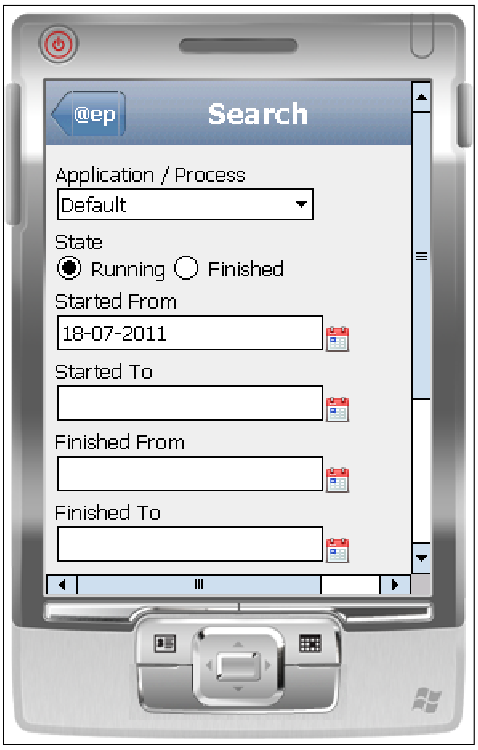


Figure 9.6: ***Search in mobile client***

After defining the search criteria and activating the button Start Search, the search result will appear. By activating the process name of an entry, detailed information about the process is displayed. This detail view contains following information:

- **Subject, Started, Finished:** These 3 rows contain information about the subject of the process and its start- and finished date.
- **Forms:** Here you find the process forms of the instance. By activating the link the form is displayed. Process forms can be also displayed by activating the form-link in worklist-overview.

- **Documents:** By activating this function a list of all attached DMS documents are shown.
- **History:** This is a simplified version of the process history described in chapter 3.2.18.
- **Process:** A graphical overview about the process is displayed (analog to chapter 3.2.19).
- **Priority:** Here the priority of the current process is displayed.

9.4 Extras

This group is a simplified version of group *Extras* described in chapter 8. The mobile version offers following functions only:

- **Set Password:** Selecting this function displays the HTML page *Set Password* described in chapter 8.3
- **Roles:** Information about the roles you are assigned to can be found here analog to chapter 8.4 (see figure 9.7).
- **Timezone:** This function allow to set the timezone for the current user. For this purpose select a timezone and activate the button *Ok*.
- **Substitutes:** This function shows an overview of all user who acts as a substitute for you as well as whom you are substituting.
- **Organisation:** This function displays the information about the organisational structure of your company. By activating the link of an organisation, a list of all available users of this OU are displayed. The detail mask of a user can be opened by activating the link of such a user entry. This detail mask allows to execute further actions (e.g. write an email).
- **Standard GUI:** This function opens **@enterprise** in standard view like in a normal browser.

Figure 9.7: ***Roles of a user in mobile client***

10 Appendix

10.1 *Task Functions in* @**enterprise**

Clicking on the function symbol in your worklist loads a window shown in figure 10.1. It contains all task functions that can be applied to the according task.

The following task functions are offered by @**enterprise** as a default:

- Add parfor steps
- Copy to ...
- Insert from clipboard
- Into clipboard
- Process note
- Set due date
- Set read/unread
- Set priority

10.1.1 Add parfor steps

This function allows to add parfor steps. One requirement is necessary: a parfor-node must be active in a parallel branch of an AND-PAR- or. OR-Par-node.

10.1.2 Copy to ...

This function can be used to send a copy of the current task to any user. The copy contains read–only versions of all forms, documents and processes of this task. They cannot be modified.

Clicking the link *Copy to ...* loads an HTML–page (see figure 10.2) in your work area.

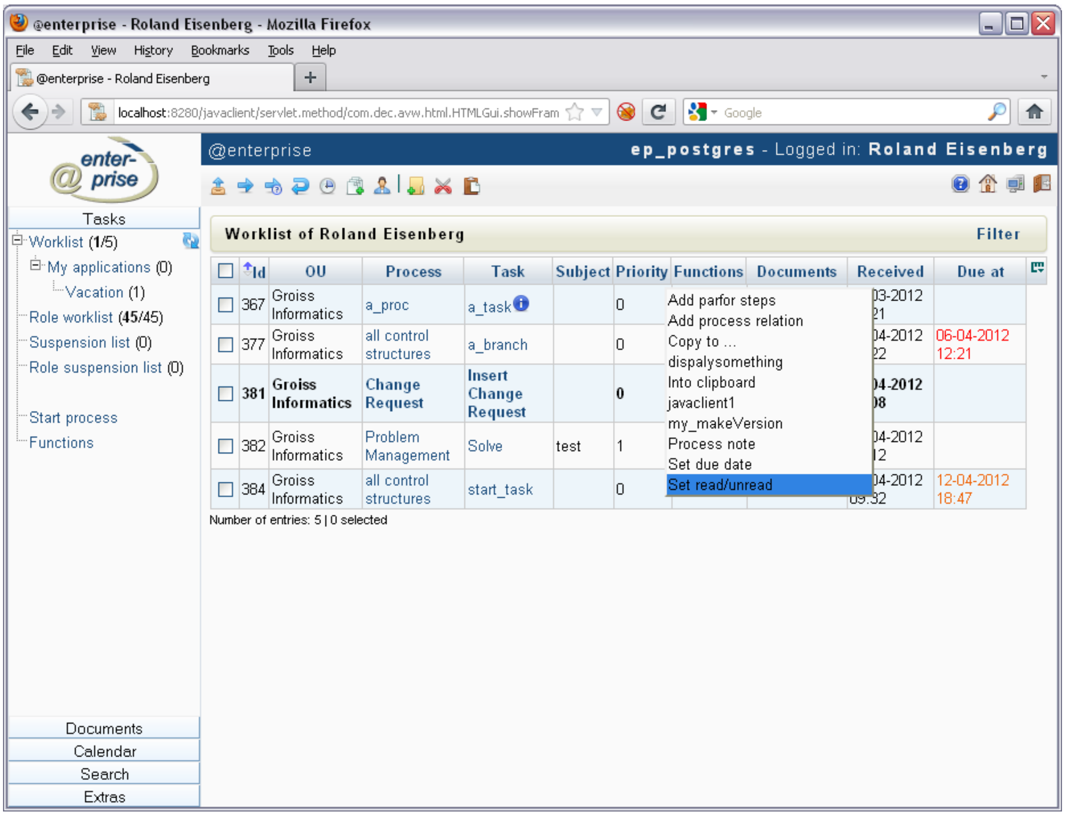


Figure 10.1: **Task functions**

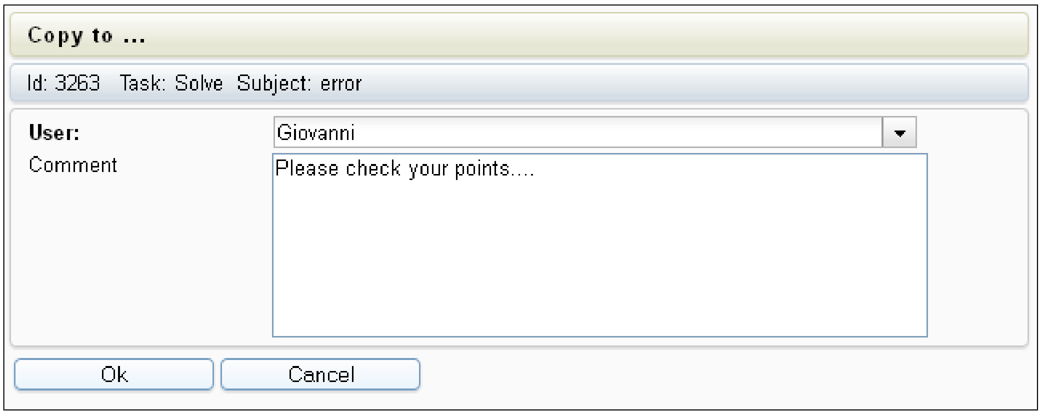


Figure 10.2: **Copy to ...**

Content of the HTML–page *Copy to ...*:

- **User:** Enter the user who should get a copy of the current task.
- **Comment:** Enter a comment for the recipient.
- **OK:** Click this button to confirm your entries and send a copy to the selected user.

- **Cancel:** This button can be used to abort the execution of the function.

After the successful execution of this function a copy of the task appears in the worklist of the selected user. The task is named *copy*.

Hint: If you complete a copy (function *Complete*) it will be removed from your worklist.

Example

Precondition: Your personal worklist is displayed and there is an already started process (with forms, documents etc.).

1. Click the function icon in the column *Functions*. A new window appears containing the functions that can be applied to the actual tasks (see figure 10.1).
2. Activating the link *Copy to ...* displays the HTML–page shown in figure 10.2.
3. Click on the button *Select* and choose your own name in the search window.
4. Confirm your entries by using the button *Ok*. A copy of the current task will be put in your worklist.

Hints

- **Error message:** If any errors occur during the execution of the function, the error messages will be displayed in the work area.
- **Copy:** A copy of a task can be recognized by its name. It is called *copy*.

10.1.3 Insert from clipboard

This function enables you to insert the content of the clipboard into the document folder of the corresponding task. At this moment the clipboard can contain DMS–Objects or links to other processes.

10.1.4 Into clipboard

This function enables you to copy the corresponding process to the clipboard.

10.1.5 Process note

See chapter 3.1.2

10.1.6 Set due date

This function can be used to set the duedate for a process, a task or both.

Clicking on the link *Set Duedate* loads the HTML–page *Set due date* (see figure 10.3) in your worklist.

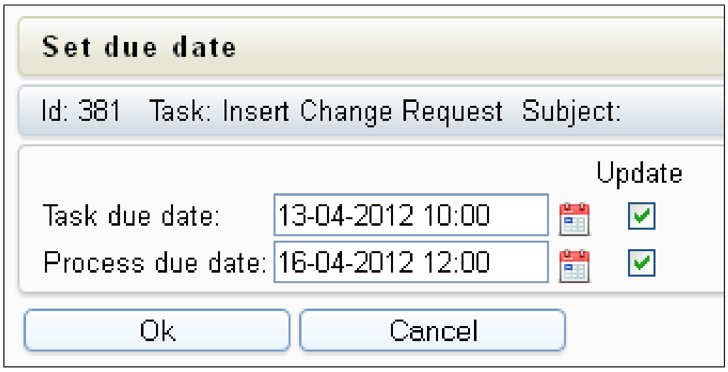


Figure 10.3: **Set due date**

Content of the HTML–page *Set Due–date*:

- **Task due date:** Enter the point of time when the actual task should be finished. Additionally mark the check box *Update*.
- **Process due date:** Enter the point of time when the actual process should be finished. Additionally mark the check box *Update*.
- **Update:** This check box is shown twice on this HTML–page. The date will only be set if the corresponding check box is marked.
- **OK:** Click this button to confirm your entries and the due–date will be set.
- **Cancel:** This button can be used to abort the execution of the function and you will be transferred to your worklist.

Hint: The column *Due to* in your worklist (see chapter 3.1.1) shows the due–date of the corresponding task or process respectively.

10.1.7 Set read/unread

Through the activation of this function the corresponding entry of your worklist is set to *Unread* (displayed in bold letters) or *Read* (displayed in normal letters).

10.1.8 Set priority

By selecting an entry of the worklist and activating this function the priority of the process can be set. A new HTML window will be opened, where you can enter the priority and store it by activating the button *OK*.