

ActiveVOS Inbox Help

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ActiveVOS Inbox Help

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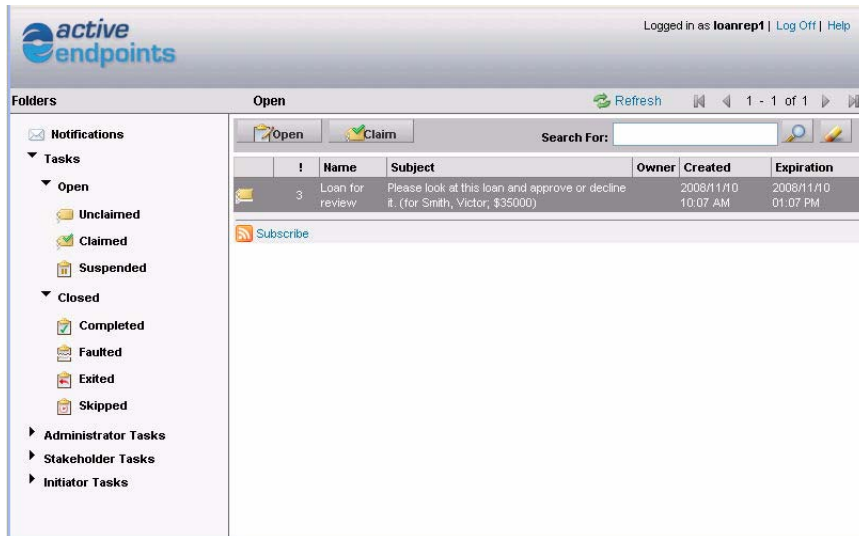
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About ActiveVOS Inbox

Welcome to your ActiveVOS Inbox, home of tasks for users and administrators. The tasks in your Inbox are part of an automated business process that requires your input. The following illustration show an Inbox.



As a user, you can do the following:

- Claim a task to start working on it
- Provide the information requested
- Complete the task
- Optionally take other actions, such as reprioritize a task
- Read notifications

As an administrator or stakeholder, you can do the following:

- View who is working on tasks
- Assign a task to a user
- Work on tasks for which you are the user and take other actions
- Add/delete attachments for notifications

A task initiator can skip a task, if it is marked skippable.

What is an ActiveVOS Task?

A task is a unit of work that has come into your Inbox with input data. It also contains a description of how to use the input data so that you can provide the output data expected.

Technically speaking, the task you work on is a step in an automated, running BPEL process. The process is waiting for you, or another user, to send back the appropriate data so that the process can continue to the next step. You are the “people” partner in an ActiveVOS BPEL for People process.

Every task has input data and an expectation for you to provide appropriate output data.

Tasks are added to your Inbox as different BPEL processes arrive at the step of needing the data you will provide. Your task list can be long, and in fact, the same tasks are most likely sent to other users who share your area of expertise. Each of you can select a task to work on, and in so doing, the task is removed from other users’ Inboxes.

For details on who can claim and manage tasks, see [About Users and Administrators](#).

To get started on your task list, see [Working with a Work Item, Attachments and Comments](#).

Go back to [About ActiveVOS Inbox](#)

About Users and Administrators

Depending on your assigned BPEL for People roles, you may be a task user, a task administrator (or stakeholder), or both. Your role is assigned during the set up of each task, and may vary on a task-by-task basis. An administrator can manage the tasks in which he or she was specified as an administrator.

In addition to working on tasks, an administrator can do the following:

- View a list of tasks and task owners for which you are an administrator
- Assign a task to someone else

An administrator can claim a task if the task was not already claimed by another user. An administrator can also assign a task to himself or herself that was already claimed by another user and then work on it.

Go back to [About ActiveVOS Inbox](#).

Navigating in the Inbox

After you sign into your ActiveVOS Inbox, you see a list of tasks, if any has been routed to you.

About Task Colors

Your task list has a white background. A highlighted task is in gray. A task that triggered a start or completion deadline has a yellow background.

Tasks have a priority, described below. You may see a red or yellow flag next to the priority. The colors indicate higher priority.

Navigate in the Inbox by highlighting a task and selecting an action, as described in the following table.

Task List Toolbar

Task Filter List	<p>You can select which tasks you want to see, according to their status.</p> <p>Individual user task list:</p> <ul style="list-style-type: none">• Open. Includes unclaimed, claimed, and suspended tasks.• Unclaimed. No one is working on this task.• Claimed. You have selected the Claim button to claim a task to work on.• Suspended. You have suspended a task and its deadlines.• Closed. Includes completed, failed, exited, obsolete and error tasks. (An error occurs when there is a problem with the BPEL process that created a task.) <p>Task lists for other roles:</p> <p>An administrator sees a global set of tasks for all users by selecting from the Administrator filters. There is a similar filter for Stakeholders and the Task Initiator.</p>
Refresh	Reload the page with the current task list. Some tasks may be overdue, and there may be some new tasks.
Page Controls	Navigate to other pages in the Inbox
Task Menu Bar	
Open	Highlight a task, and select Open to open the Task Detail page.

Claim	Claim ownership of a selected task so you can begin working on it, and it becomes unavailable for other potential owners. The task details become available, and you are able to add data to the Output or Fault reply. See Claiming and Performing Other Actions for a Task .
Remove	Remove a selected notification
Search For	Select criteria, based on one of the following: <ul style="list-style-type: none"> • Search By expression in the task definition • Task subject Select Search By to begin the search query. You can use a wildcard character in your search expression. Select Clear to clear the Search text box.

Task Details on Main Inbox page

Status	See the status list above in the Task Filter List description
Priority	A priority can be a non-negative number, beginning with the highest priority, which is 0. Note that by default only priorities 0 and 1 have a flag icon. Lower priorities (higher numbers) do not have an icon, unless they were added in your environment.
Subject	Short description of the task
Name	Task name
Owner	A username is in this column, if the task has been claimed
Created	Date and time the task was first routed to the Inboxes of all potential owners
Expiration	Date and time the task will expire. After this time, the task cannot be completed.

Task Details Page Additional Information. Claim a Task to open Task Details Page.

Created By	Name of the BPEL process that created the task
Modified and Modified By	Task owner or administrator who modified a task detail and the time it was modified. See Modifying a Task .
Escalated	Indicates whether or not an action has been taken in relation to a deadline. For details, see What Happens When a Task is Overdue .
Detailed Description	Additional details about the task appear above the Work Item area. See Working with a Work Item, Attachments and Comments and Completing or Failing a Task .

Go back to [About ActiveVOS Inbox](#).

Refreshing Your Task List

It is a good idea to refresh your task list periodically by selecting the **Refresh** button. While you are signed in, the following events may cause your list to change:

- New tasks arrive
- The priority of a current task may change
- Another user claimed the task
- A task may be removed from your list due to an automated deadline action
- A task administrator may have reassigned a task to another user

Note: If a task is removed from your list, or if its priority changes, look for a related email. Automated actions, such as an email sent to you, are often associated with a change in a task's status.

Go back to [About ActiveVOS Inbox](#).

Claiming and Performing Other Actions for a Task

A task goes through stages as you take different actions on it.

Here is a list of actions you can take before completing a task, and what results from them:

Claim

You can claim a task to start it. When you claim a task, it becomes unavailable for other users to work on or see it in their Inbox. When you start a task, all of the task work options are enabled, as described in [Working with a Work Item, Attachments and Comments](#).

Release

If you claim a task, you can release it, meaning you will not complete the work on it. The task returns to unclaimed status and is available for any user in the group to claim it. The task reappears in other users' Inboxes when they refresh their view.

Assign

This is an administrator-only action. For details, see [Assigning a Task to Another User](#).

Set Priority

You can change the priority of a task after you claim it. The highest priority is zero. You can assign any non-negative number (0,1,2, etc.) to lower or raise the priority.

Skip

Skip the task, meaning it will not be completed. The task definition must contain a “skippable” value or else this option is unavailable.

Suspend

The task goes to suspended state; however, deadlines still execute.

Resume

Available if a task is in a suspended state.

Go back to [About ActiveVOS Inbox](#).

Working with a Work Item, Attachments and Comments

After you start a task, you can use the Task Detail page as follows.

Work Item

The Work Item contains the input data to use for completing the task. For example, the input data may contain details about a person, purchase order, or reservation. You will provide the appropriate output data. For example, based on a customer request, you may need to provide the appropriate cancellation code for a reservation.

Sometimes you cannot complete a task normally, and you must provide fault data, as described in [Completing or Failing a Task](#).

Provide the output or fault data by filling in appropriate values, as shown in the yellow highlighted area in the following example.

The screenshot shows the ActiveVOS web interface. At the top, the logo 'active endpoints' is visible on the left, and the user is logged in as 'mford' with links for 'Log Off', 'Back to Inbox', 'Refresh', and 'Help'. Below the header is a navigation bar with icons for 'Release', 'Complete', 'Fail', 'Skip', 'Assign', and 'Suspend'. The main content area is divided into 'Input' and 'Output' sections. The 'Input' section shows a task named 'whatDoYouWantForDinner' with details: Name: Ruby Monday afternoon, Id: grilled cheeseburger, Description: med rare, and Price: 11.99. Below this is a 'Set Output' dropdown menu. The 'Output' section shows a task named 'myOrder' with fields for 'Id' and 'Quantity', both of which are currently empty. At the bottom of the 'Output' section are two buttons: a green checkmark and a red 'X'. Below the 'Output' section are tabs for 'Comments', 'Attachments', 'Details', 'History', and 'Task XML'. The 'Comments' tab is selected, showing a 'No Comments' message.

Saving or Clearing Data and Fault Name Changes

After you enter output or fault data, select **Save**. Saving the data prevents its loss in case your Inbox session times out, described in [Session Time Out](#). You can select **Reset Form** to remove all changes, or you can modify the saved data and select Save again. The data does not become a permanent record of the task until the final time you select Save and then you select **Complete** or **Fail**.

If you selected a **Fault Name** that you do not want, select **(None)** and select **Save** to clear any data.

Attachments

Attachments are documents in support of the task that you may need to use or that you may need to add or remove.

To view an attachment:

- 1 On the Task Detail page, select the Attachments tab. If an attachment exists, it is listed by name and type.
- 2 Select **Download** to open or save the file to your computer.

To add an attachment:

- 1 On the Task Detail page, select the Attachments tab.
- 2 Select **Browse**.
- 3 Select a file you want to add.
- 4 Select **Attach File**.

To remove an attachment:

To remove an attachment from the task, select the attachment's **Delete** link. This action does not affect any files on your computer.

Comments

You can view and add comments about a task for other users and administrators to see. The comments accompany a task from one person's Inbox to another and, possibly, from one People activity to another in a BPEL process (if implemented).

You can modify or delete comments that you add, not that others may have added. Administrators can modify or delete any comments associated with the task. Once the task is completed, the comments cannot be edited or deleted.

In the ActiveVOS Server Administration Console, a list of comments appears in the Active Process Details View.

When you are through working on a task, refer to [Completing or Failing a Task](#).

Go back to [About ActiveVOS Inbox](#).

Modifying a Task

If you or another user takes one of the following actions, the Modified date in the Task Detail page changes:

- Claim or release the task
- Add, edit, or delete a comment
- Add/remove an attachment
- Set a new priority
- Add output or fault data

Go back to [About ActiveVOS Inbox](#).

Completing or Failing a Task

Completing a task is the normal end to a task. When it is not possible to complete a task normally, due to missing or incomplete data, you can complete a task by failing it, if the appropriate fault response exists.

To complete a task normally:

- 1 On the Task Detail page, supply all output data for all output items, as described in [Working with a Work Item, Attachments and Comments](#).
- 2 If needed, add or remove attachments, and add comments.
- 3 Select **Save**.
- 4 Select **Complete**. The task is marked Completed and is no longer displayed in your list of *All Open* tasks. If desired, you can view a list of *All Closed* tasks.

To fail a task:

- 1 On the Task Detail page, select **Fault** from the Output/Fault list, if a fault is available.
- 2 Select the appropriate **Fault Name** from the list. Note that there may be several faults, one each for a different reason.
- 3 Supply appropriate fault data for the fault, as described in [Working with a Work Item, Attachments and Comments](#). Data is required.
- 4 If needed, add or remove attachments, and add comments.
- 5 Select **Save**.
- 6 Select **Fail**. The task is marked Failed and is no longer displayed in your list of *All Open* tasks. If desired, you can view it in a list of *All Closed* tasks.

Note: Closed tasks are deleted from your Inbox by an ActiveVOS Administrator who schedules task deletions.

Go back to [About ActiveVOS Inbox](#).

Assigning a Task to Another User

An administrator can assign a task to a user. If the task is currently owned by another user then that user's claim to the task is revoked. The user chosen by the administrator becomes the new owner. If the old and new owners are already signed in, they must select **Refresh** to see the change to their Inbox.

An administrator can assign a task to any user.

To assign a task:

- 1 From the main page of the Inbox, double-click a task to open the Task Detail page.
- 2 Select **Assign**. This option is not available if you are not an administrator of this task.
- 3 In the Assign Task dialog, type in the name of a user. The user does not need to be among the potential owners group.
- 4 Note that in the main Inbox page, the task is now claimed by the new owner.

Note: Sometimes a task is automatically reassigned, as described in [What Happens When a Task is Overdue](#).

Go back to [About ActiveVOS Inbox](#).

What Happens When a Task is Overdue

A task can have several deadlines and associated actions, including:

- Start deadlines, which describe when a potential owner must start working on the task. The deadlines are enabled as soon as the task is created and are disabled once a potential owner starts the task.
- Completion deadlines, which describe when an owner must complete the task. The deadlines are enabled as soon as the task is created and are disabled once an owner completes the task.
- Expiration date, which is enabled as soon as the task is created and is disabled once an owner completes a task

Based on start and completion deadlines, a task can trigger escalation actions. For example, there might be the following type of actions, each with its own start deadline:

Escalation Action Example #1: “If this task is not started within three hours after it is created, send an email reminder to the task owner.”

Escalation Action Example #2: “If this task is not started within six hours after it is created, raise the priority level, and send an email reminder to the task administrator.”

Escalation Action Example #3: “If this task has been claimed, but not started within three hours after being created, revoke the task from the current owner, and return it to the pool of potential owners.”

Similar types of escalation actions also exist for completion deadlines.

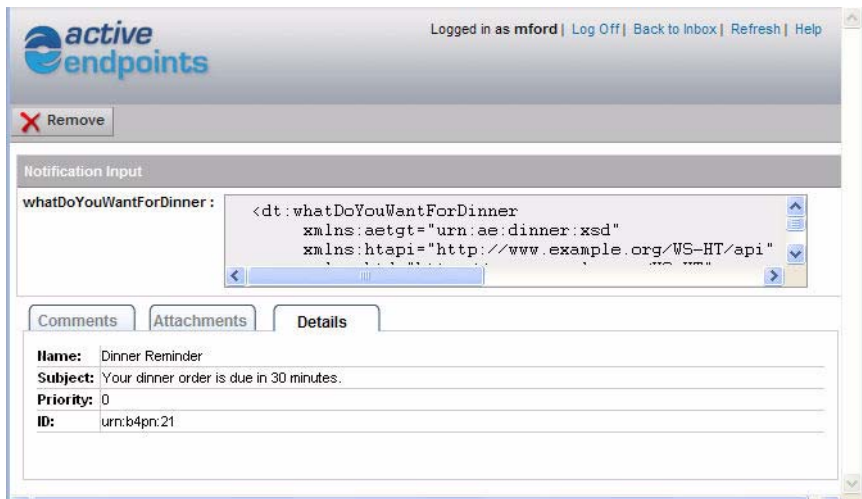
Because there may be escalation actions associated with the tasks you are working on, it is helpful to refresh your task list while you are signed into your Inbox, as described in [Refreshing Your Task List](#).

Go back to [About ActiveVOS Inbox](#).

Reading and Removing Notifications

A notification requires no action except to read it. When you’re done, you can remove the notification.

The Notification Details page looks like the following illustration.



Viewing Task History

The History tab in the Inbox Task Details page displays the changes to date for a task. You can see when the task first arrived in your Inbox and what has happened to it since then. If you entered an output response, and selected Save, you can view the XML details of what you saved by selecting the **Set Output** Event Type.

Comments Attachments Details History Task XML				
Date	Event Type	User	Owner	Status
2008/09/26 02:35 PM	Created			Ready
2008/09/26 02:37 PM	Started	loanrep1	loanrep1	Started
2008/09/26 02:48 PM	Stopped	loanrep1	loanrep1	Claimed
2008/09/26 02:49 PM	Suspended	loanrep1	loanrep1	Suspended
2008/09/26 02:49 PM	Resumed	loanrep1	loanrep1	Claimed
2008/09/26 02:49 PM	Started	loanrep1	loanrep1	Started
2008/09/26 02:50 PM	Set Output	loanrep1	loanrep1	Started
2008/09/26 02:51 PM	Set Output	loanrep1	loanrep1	Started
2008/09/26 02:51 PM	Completed	loanrep1	loanrep1	Completed

Viewing Task XML

The Task XML tab is displayed in the Work Item area when the task definition includes a rendering for it. The Task XML view, used for debugging, is automatically displayed if the task developer selected the Development Mode checkbox during task creation. The contents of this tab is updated during design time when a developer makes changes to the XSL rendering files that display the task details.

Adding an RSS Feed for Inbox Updates

If desired, you can create one or more RSS feeds that represent the data within the ActiveVOS Inbox.

You can set up an RSS subscription by selecting the **Subscribe** button on a particular view of the Task Details page. The subscription is for a RSS 2.0 Feed. For example, if you want to view a list of Open Tasks as RSS, you can subscribe on the that page.

You can also view task details by using the ActiveVOS task feed service. You can use a feed URL with optional parameters.

Examples:

ATOM Example: With the ActiveVOS server running, type the following into a Web browser:

```
http://localhost:8080/active-bpel/services/REST/
AeB4PTaskFeed?filter=open&role=administrator&maxTasks=10
```

This URL returns feed data for a maximum of 10 open administrator tasks. The tasks are in your Inbox; that is, the Inbox that is authenticated on your server.

RSS Example: List Open Tasks. Open Tasks is the default setting, so there is no need to add any of the optional query parameters except for the format (rss):

```
http://localhost:8080/active-bpel/services/REST/AeB4PTaskFeed?format=rss
```

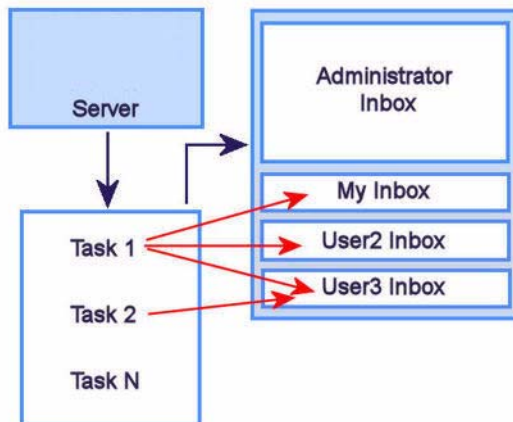
The following table describes the parameters you can use in a URL.

Parameter	Allowed Value(s)
details	true, false If true, then feed content includes additional text such as status, priority and owner. Otherwise, only the feed item subject is returned. The default value is <code>false</code> .
filter	notifications, open, closed, unclaimed, claimed, completed, error, obsolete, failed Default is <code>open</code> .
format	atom, rss. Indicates the preferred feed format - ATOM 1.0 or RSS 2.0. The default is <code>atom</code> .
maxTasks	integer_value. Default is 20.
role	user, administrator, initiator, stakeholder Default is <code>user</code> .
searchBy	Search By expression that is part of the task definition
taskIndexOffset	integer_value. Start at task integer_value and display integer_value + maxTasks. Default is 0. (Example: Display tasks 15 through 35.)

2 About ActiveVOS Server and the Inbox

ActiveVOS server runs Business Process Execution Language (BPEL) processes that can include tasks intended for users. An Inbox application allows users to receive, manage and work on tasks.

As the following illustration shows, ActiveVOS server runs BPEL processes, and when it encounters a task that requires user intervention, it sends the task to the appropriate administrator and user Inboxes.



When tasks are created, user groups are identified that are appropriate for handling the tasks. The same task may be sent to multiple users, since not everyone is available to work on a new task. Only one user claims any task.

When the task is complete, the user sends the appropriate response to the ActiveVOS server so that the BPEL process can continue its activities.

There are many ways for users and administrators to complete and manage tasks, as described in [About ActiveVOS Inbox](#).

Starting and Signing Into the Inbox

Before running the Inbox in your browser, be sure your ActiveVOS Administrator has completed configuration and database setup by following the instructions in

ActiveVOS Installation, Configuration, and Deployment Guide located in the *ActiveVOS product installation\doc* folder.

You need a valid username and password to sign in to your Inbox.

Your administrator must add the role name *abtaskclient* to your identity service and add that role for you.

Before you open your Inbox, ActiveVOS server must be running. Start up the Inbox by typing the following into your browser:

```
http://localhost:8080/activevos-inbox
```

Change the port number if 8080 is already in use on the computer.

The Sign In page appears for you to type in your Username and Password. Select **Sign In** to continue.

Go back to [About ActiveVOS Server and the Inbox](#).

Session Time Out

If you are signed into your Inbox, but are not actively using it, the session may expire. The default time-out setting is 30 minutes, but may vary in your environment. If a time-out occurs, the Sign In page appears when you select **Refresh**.

Note: Be sure to save your task output data after you enter it, so that the changes are not lost if your session times out. For details, see [Working with a Work Item, Attachments and Comments](#).

Go back to [About ActiveVOS Server and the Inbox](#).