



User Guide
**QAD Business Process
Management**
(QAD BPM)

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QAD BPM

QAD BPM is a business process management tool that can guide you through multistep business processes to improve your operational efficiency within and across functional business units.

Welcome to QAD BPM 2

This book is intended for task performers who carry out specific business tasks in a business process and users with the QAD administrator role who manage all business processes and related tasks.

Interaction Between QAD BPM and QAD Enterprise Applications 2

QAD BPM provides quick navigation to the QAD EA functions.

Differences Between QAD BPM and QAD Alerts 3

While QAD Alerts can alert users about exceptional business events, it does not manage business processes. On the other hand, QAD BPM is focused on business process management.

Typical Work Flow 4

In QAD BPM, when particular user actions happen, a process instance starts automatically.

QAD BPM Security 4

Some groups in BPM are the same groups as in QAD EA for menu security purposes. Some groups are set up specifically for BPM with no reference to .NET UI menu security.

Welcome to QAD BPM

A business conducts itself within some defined norms, policies, practices, and a set of activities. A business process is essentially a collection of related business activities with specified logic for coordination between such activities and the governing norms, policies, and practices. The idea of Business Process Management (BPM) is to treat business processes as assets, manage their life cycle, and seek to optimize them.

BPM increases operational efficiency in several ways. By integrating computer calculation of applicable rules associated with processes, BPM increases the level of automation in process execution, which in turn decreases process cycle time and increases process volume. Reduction in human activities reduces human errors—thus increasing reliability and reducing exceptions. In processes where automated tasks and human activities are combined, BPM makes the human participation explicit and precise, which leads to productivity improvements.

QAD BPM is a business process management tool that guides you through multistep business processes to improve your operational efficiency within and across functional business units.

In QAD BPM, task performers can view their own tasks in their personal task lists, and get to the associated QAD application screens. QAD BPM is a nonrestrictive solution for QAD users—users can use online maintenance menu programs with no lock-out, even when process instances are active for the data they are updating.

This guide is intended for the following audiences:

- Task performers, also known as application users, who are responsible for carrying out specific business tasks in a business process
- Administrator users (*qadadmin*), who manage all business processes and related tasks

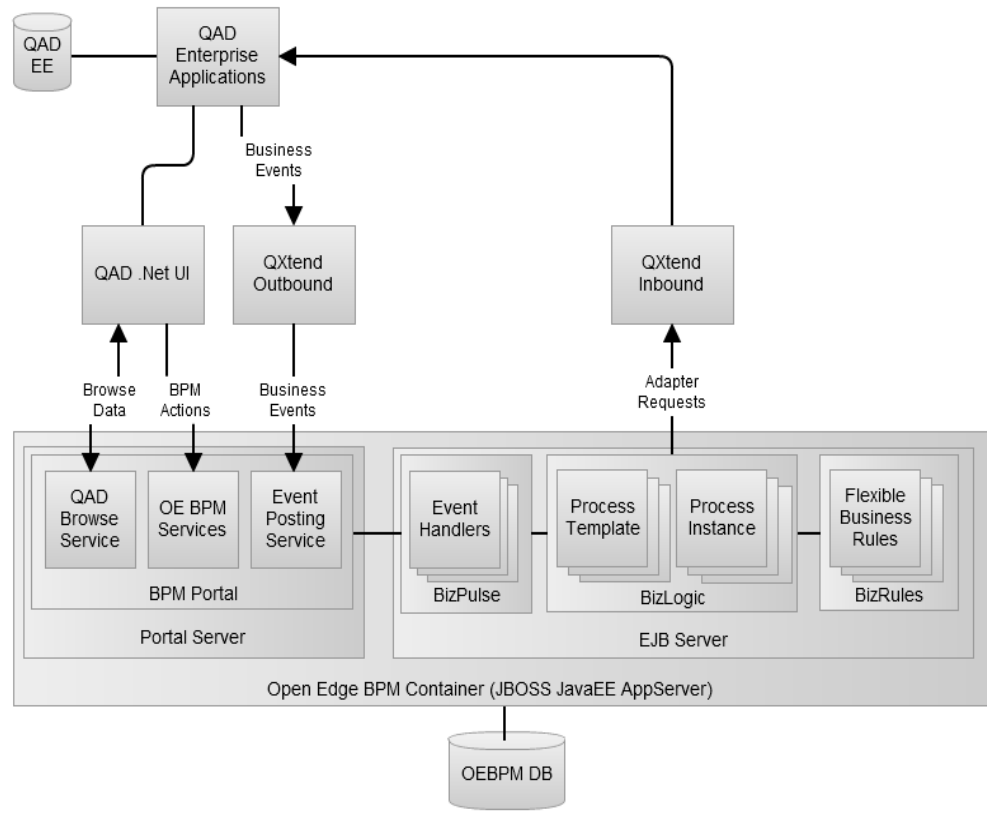
For information about developing business processes, see *QAD BPM: Training Materials for Developers*.

Interaction Between QAD BPM and QAD Enterprise Applications

QAD BPM provides quick navigation to the QAD Enterprise Applications (QAD EA) functions. In a multi-user collaboration process, you can easily collaborate with other users who use QAD EA supported functions.

Figure 1.1 is an illustration of how QAD BPM interacts with QAD EA.

Fig. 1.1
Interaction with QAD EA



Differences Between QAD BPM and QAD Alerts

While QAD Alerts can alert users about exceptional business events, it does not manage business processes. On the other hand, QAD BPM is focused on business process management.

BPM is further distinguished with the following characteristics:

- Multi-user collaboration. BPM emphasizes work step dependencies of multiple users.
- Predefined business processes. Process models are implemented around predefined business processes: document approvals, collaborative data entry, cross-functional order processing, and so on. Therefore, some degree of business process definition or modeling in advance is required for an enterprise to successfully deploy BPM.
- Long-running activities. Unlike individual updates, queries, or reporting functions, process instances are relatively long-running activities that span days or weeks, depending on the nature of the business.

Many processes are designed to manage the life cycles of business documents that require approvals of multiple users and groups before they are complete. QAD BPM maintains the state of active process instances over long periods of time, keeping the state synchronized with the data content maintained within QAD Enterprise Applications.

Differences Between QAD BPM and Process Maps

Process maps provide graphical navigation for the principal business and operational processes within a QAD application. However, process maps do not control the execution of the processes.

On the other hand, QAD BPM directly represents how a business process is executed and each task in the process is assigned to a specific user or group.

In other words, process maps define what needs to be done and how to do it, using documentation attachments and so on. For BPM, it adds the dimensions of who needs to do the tasks and when the tasks need to be done.

Typical Work Flow

In QAD BPM, when particular user actions happen, a process instance starts automatically. The BPM system, in generating the process instance, makes tasks in the process instance available to users who are assigned the task-specific roles.

- 1 One of the users who are available to handle the first task sees the task in the Tasks Browse. The user completes the task and the task is removed from the Tasks Browse.
- 2 The BPM system processes the process instance and sends the next task in the process instance to the user assigned.
- 3 The assigned user performs the task.
- 4 A process owner, who manages the business process, checks the process workstep status in the Processes Browse.
- 5 When all the required tasks in the process instance are completed, the process is completed and removed from the Processes Browse.

QAD BPM Security

The following data are maintained in QAD EA and shared to QAD BPM:

- Users
- Groups in which one or more users are members
- QAD domains to which users have access

Note Roles defined in QAD EA are called groups in BPM.

Some groups in BPM are the same groups as in QAD EA for menu security purposes. Some groups are set up specifically for BPM with no reference to .NET UI menu security. In any case, make sure that all groups in BPM are set up as roles in QAD EA.

For more information about .NET UI security, see *User Guide: QAD Security and Controls*.

Using QAD BPM

QAD BPM is embedded in the application area of the QAD .NET user interface. You can access QAD BPM functions in the QAD .NET UI.

BPM Browse Overview 6

You can use Tasks Browsers to manage tasks, Processes Browsers to manage process instances, and the Delegate My Tasks Browse to delegate your tasks.

Using Tasks Browse 10

Use the Tasks Browse to carry out specific business tasks in a business process.

Delegating Tasks 20

You can delegate your tasks to other users.

Using Processes Browse 22

Use the Processes Browse to manage business process instances.

Using History Browse 31

Use the History Browsers to view the completed tasks and process instances.

Refreshing Browse Views 32

Content of Tasks Browse or Processes Browse can be refreshed.

Adding and Viewing Process Comments 33

You can add and view comments for an active process instance.

Maintaining Process Ownership (for Administrators) 35

Administrators can use Process Ownership Maintenance to define which role is responsible for which business process.

Launching Processes from Custom Forms (for Authorized User) 37

The system allows users to create a launch screen in QAD .NET UI to launch a process from custom forms.

Customizing Your User Interface 38

You can customize your user interface to make it more convenient for you to use.

Tasks Notification 40

You can get email notifying that you have BPM tasks to do.

BPM Browse Overview

Integrated with QAD Enterprise Applications, QAD BPM is embedded in the application area of the QAD .NET user interface. Therefore, QAD BPM is consistent with the rest of the QAD EA applications in terms of look and feel and navigation. For information on the .NET user interface, see *User Guide: Introduction to QAD Enterprise Applications*. This section describes user interface features specific to QAD BPM.

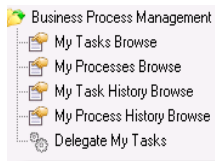
You can access QAD BPM functions by using either the Menu Search field or the menu tree in the Applications pane in the QAD .NET UI. After QAD BPM is installed, the functions are grouped under Business Process Management by default.

If you are a task performer who is responsible for carrying out specific business tasks in a business process, you can:

- Manage your to-do tasks in My Tasks Browse.
- Manage your process instances in My Processes Browse.
- View all your completed tasks in My Task History Browse.
- View all your completed process instances in My Process History Browse.
- Delegate your tasks by using Delegate My Tasks.

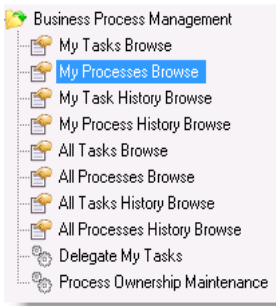
Note My Tasks Browse shows only the tasks that are associated with the current domain. My Processes Browse shows only the processes that associated with the current domain. To see tasks and processes associated with different domains, switch workspaces in .NET UI.

Fig. 2.1
For Task Performers



Compared with normal users, administration users have access to more BPM functions.

Fig. 2.2
For Administrators



If you are a BPM administrator (*qadadmin*), besides using all the functions available to a task performer, you can also:

- Manage all tasks that have not been completed in All Tasks Browse.

- Manage all business processes in All Processes Browse.
- View all completed tasks in All Tasks History Browse.
- View all completed process instances in All Processes History Browse.
- Define process ownership by using Process Ownership Maintenance.

Role-Based Process Ownership and Visibility

One of the key benefits of a BPM solution is the increased level of visibility of specific business processes or a specific business area. In My Processes Browse, you can view all instances of the process that your role is responsible for.

Example You are a Purchasing manager. Your role is responsible for monitoring supplier information of all suppliers.

- For you, in your Processes Browse, you can manage all suppliers created by any employee in your organization. To identify which Supplier Creation process instance is created by which employee in your organization, you can look at the Creator field.

Fig. 2.3
All Supplier Creation Processes Instances for a Purchasing Manager

Application	Document ID 1	Creator	Creator Name
Supplier Creation	S11 (Supplier)	BUYER1	Buyer1 demo
Supplier Creation	Sup 150 (Supplier)	BUYER1	Buyer1 demo
Supplier Creation	Sup 16 (Supplier)	BUYER1	Buyer1 demo
Supplier Creation	Sup 20 (Supplier)	BUYER1	Buyer1 demo
Supplier Creation	SUP-003 (Supplier)	demo	Demo User
Supplier Creation	test (Supplier)	BUYER2	Buyer2 demo
Supplier Creation	Sup 12 (Supplier)	BUYER2	Buyer2 demo

- For a buyer, in his Processes Browsers, he can manage the suppliers that he has created.

Fig. 2.4
Supplier Creation Processes Instances for a Buyer

Application	Document ID 1	Creator	Creator Name
Supplier Creation	S11 (Supplier)	BUYER1	Buyer1 demo
Supplier Creation	Sup 150 (Supplier)	BUYER1	Buyer1 demo
Supplier Creation	Sup 16 (Supplier)	BUYER1	Buyer1 demo
Supplier Creation	Sup 20 (Supplier)	BUYER1	Buyer1 demo

A process can be owned by one or more roles. Administrators can define which role is responsible for which business process. For more information, see “Maintaining Process Ownership (for Administrators)” on page 35.

Understanding Business Process Structure

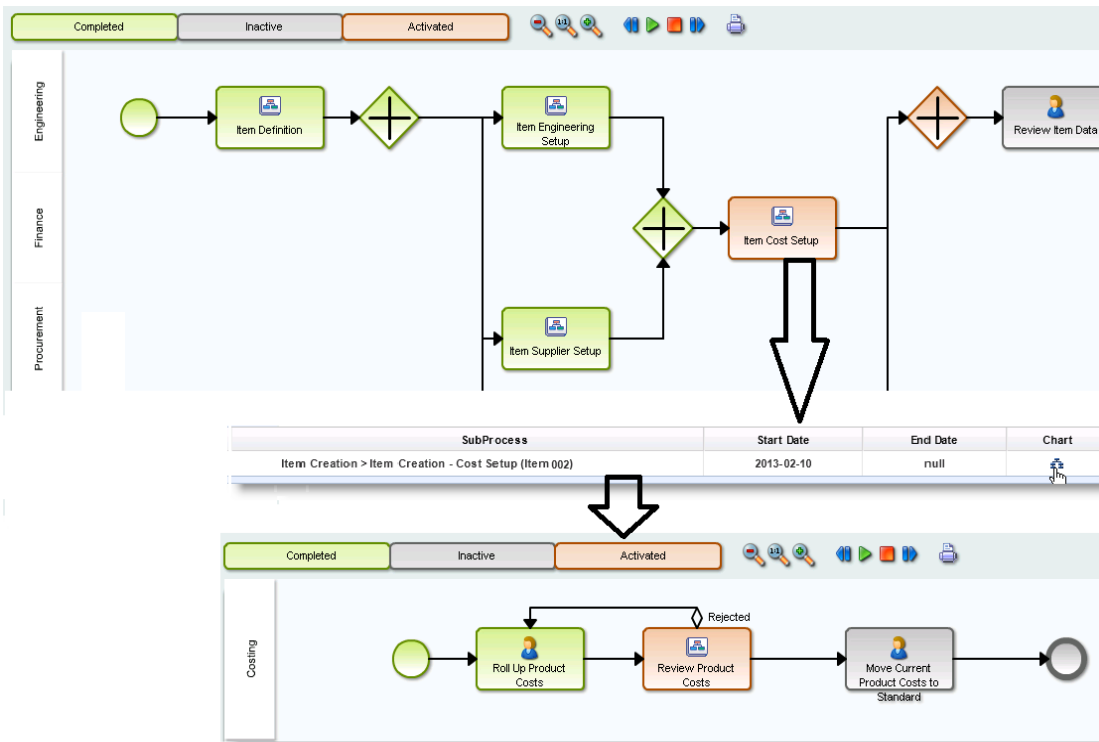
A business process involves multiple work steps in the form of operations, interactions, and notifications.

- A work step in the business process can be on an atomic level, which represents work that cannot be broken down. It can have human or computer performers. If the work is assigned or made available to you, it is your task.
- A work step can also be a subprocess, which can be broken down to a finer level of detail.

Example Figure 2.5 shows a process of item creation. In this process, there is a subprocess of Item Cost Setup; you can tell that it is a subprocess by the flowchart icon in the picture.

Click the subprocess and you can see the Start Date, End Date information about it. Then you can click the flowchart icon to view the subprocess details. You can see that the Cost Setup subprocess contains a subprocess of its own, the Review Product Costs subprocess.

Fig. 2.5
Understand Subprocesses



In other words, there can be a hierarchy of subprocesses.

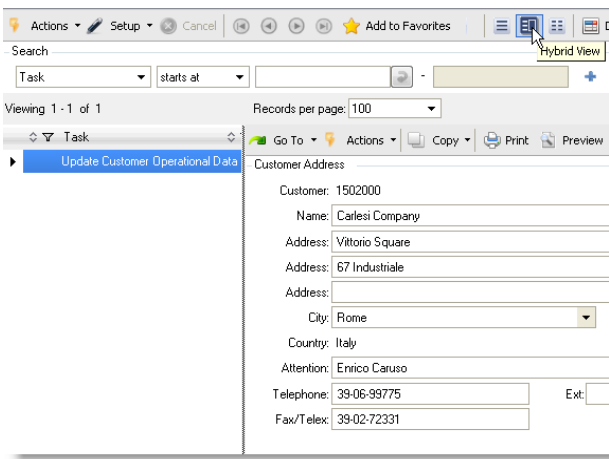
Note QAD provides a standard template for the approval process, as the approval process can be used as a subprocess in many business processes, such as the Item Cost Setup process. For more information about the approval subprocess, see “Completing Tasks in the Approval Subprocess” on page 16.

Controlling Browse Views

Applications can be launched from your BPM browse. For example, the Customer Maintenance screen can be launched from Tasks Browse or the Comments screen launched from Processes Browse. You can choose whether to view the full screen of the launched application.

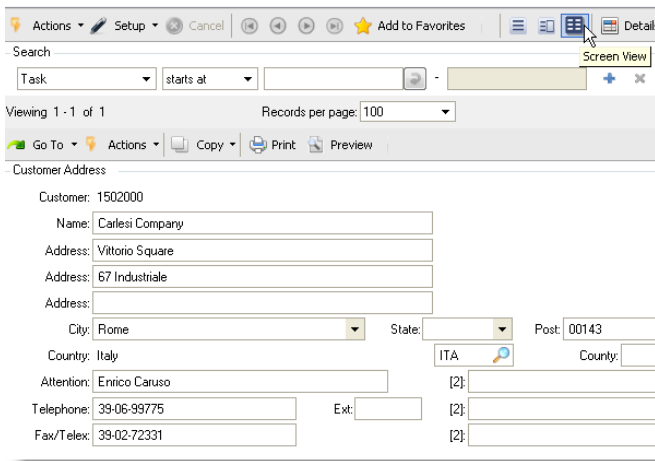
- **Hybrid View:** By default, you can see both the browse screen and the launched application screen.

Fig. 2.6
Hybrid View



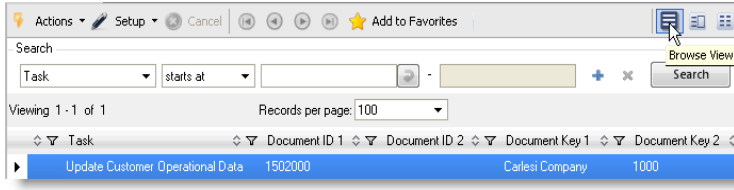
- **Screen View:** If you want to see the full launched screen, click the Screen View button in the application toolbar.

Fig. 2.7
Screen View



- **Browse View:** When you click the Browse View button, you are back to the original screen. See Figure 2.8 as an example.

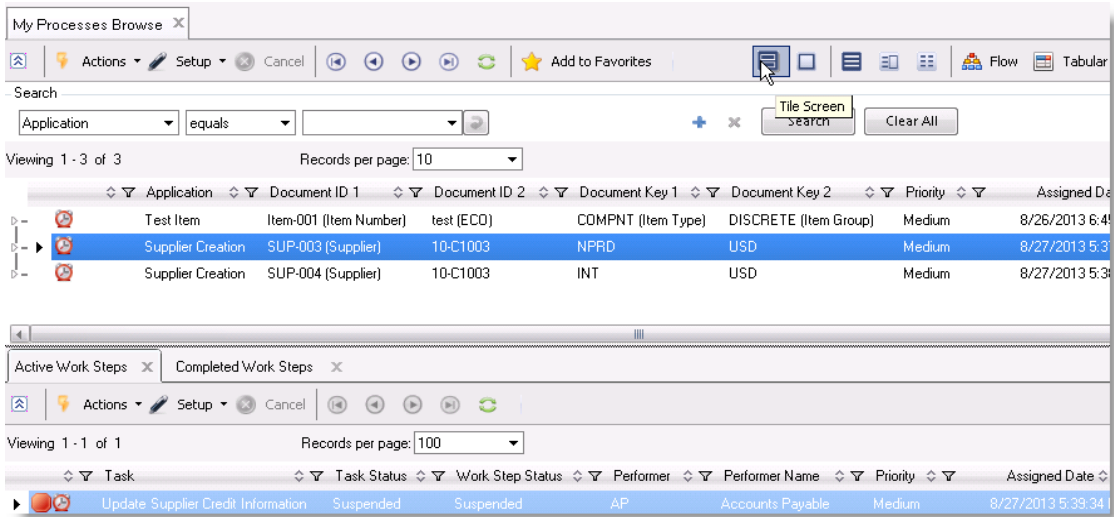
Fig. 2.8
Browse View



Additionally, in the Processes Browse, there are Tile Screen and Full Screen icons on the toolbar. They allow you to switch between the Tile screen view (the default view) and the full screen view.

In the Tile screen view of a process, you can see some work steps of the process in a child browse. From the child browse, you can see currently active work steps as well as work steps that have been completed.

Fig. 2.9
Tile Screen

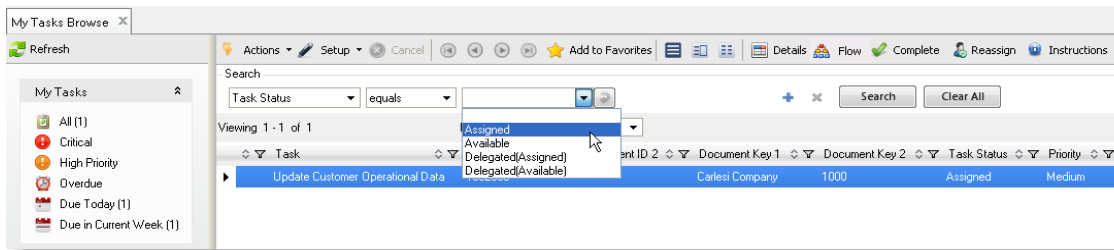


Using Tasks Browse

Use the Tasks Browse to carry out specific business tasks in a business process.

Some tasks in your Tasks Browse are mandatory; they are assigned to you. Other tasks are optional; they are available to you but not assigned to you, as the task is assigned to a group of users that you belong to.

Fig. 2.10
Task



Assigning Tasks

A task can be:

- Assigned: assigned to you; you are to complete the task
- Available: assigned to a group of users that you belong to; no one has taken the task yet
- Delegated (Assigned): delegated to you by another user
- Delegated (Available): the task was assigned to a group of users; one user in the group delegated the task to you. You do not necessarily belong to the group.

Usually, tasks are assigned to groups in which one or more users are members, rather than to individual users. By assigning to groups rather than to users, you do not have to modify the assignment when users change their roles or leave the company.

When a task is assigned to a group and you belong to the group, the task status is shown as Available in your task list.

If you want to take an available task, you can do one of the following:

- Click the Assign To Me button.
- Double-click the task, then click Yes in the pop-up message box.

Fig. 2.11
Assign To Me

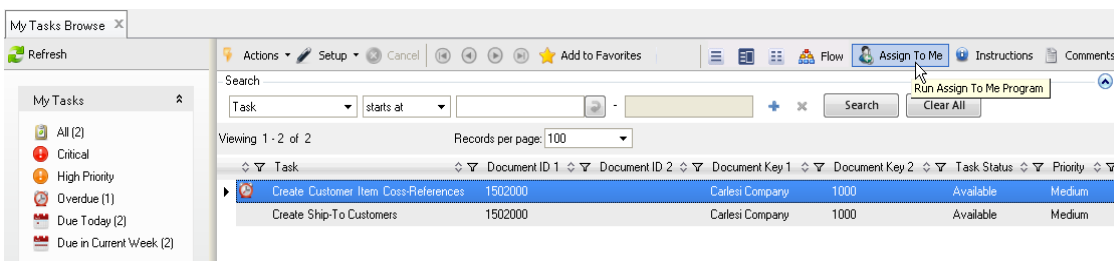
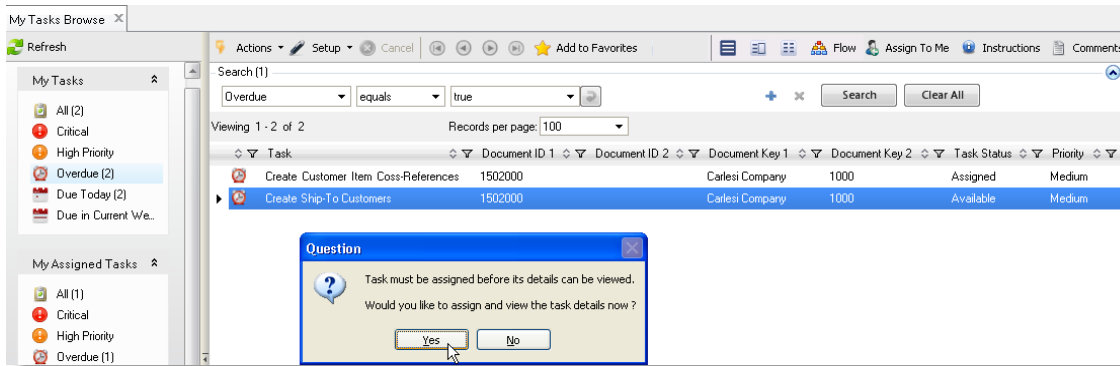
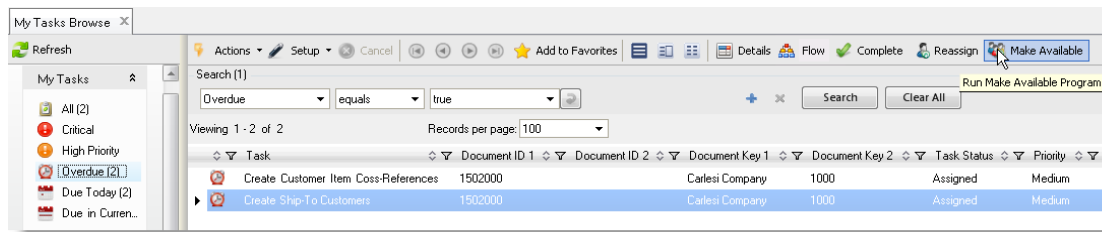


Fig. 2.12
Another Way of Assigning a Task to Yourself



After you take the available task, the task status is changed from Available to Assigned. You can reverse the task status by clicking the Make Available button. Then the task is again available to all the members of the group.

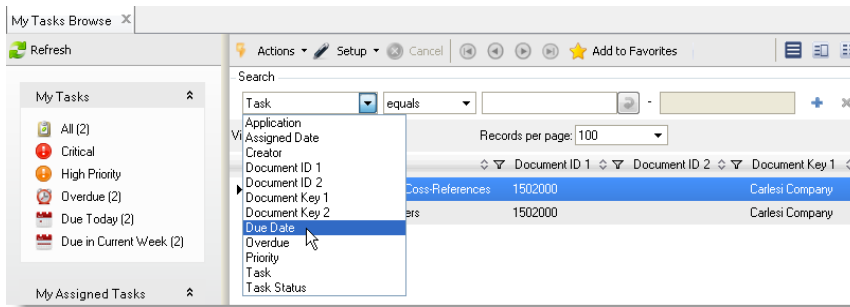
Fig. 2.13
Make Available



Searching Tasks

To search for tasks you want to view, use the fields in the Search Panel.

Fig. 2.14
Search for Tasks



The search criteria can be based on:

Application. The name of the business process that your task belongs to.

Assigned Date. The date the task is assigned to you.

Creator. The ID of the application user who created the task.

Document ID 1. An identifier for the process instance.

Document ID 2. A sub-identifier for the process instance.

Document Key 1. An attribute to identify the process instance.

Document Key 2. A sub-attribute to identify the process instance.

Due Date. The date when the task is due.

Overdue. Whether the task is overdue.

Priority. Priority level of the task. It can be Low, Medium, High, or Critical.

Task. The task name.

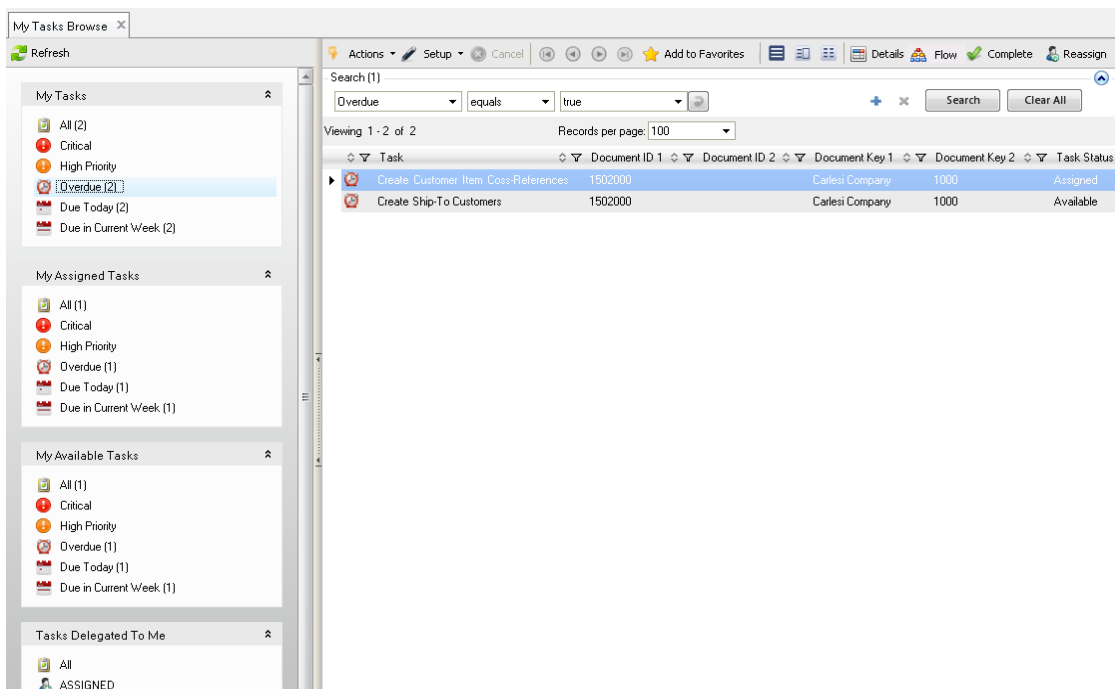
Task Status. Whether the task is mandatory or optional for you.

Using Predefined Filters

Besides using search criteria for customized views, you can use the system-defined filters that are displayed on the left side of the screen. Using system-defined filters helps you easily and quickly access specific tasks in your task list.

Figure 2.15 is an example of using the system-defined filter to see overdue tasks. Notice that an overdue task is marked with a clock icon.

Fig. 2.15
Use Predefined Filters

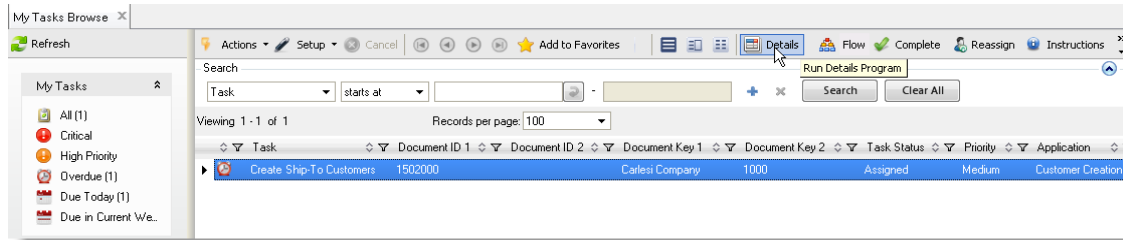


Performing a Task

To perform a task that is assigned to you, double-click the task item or click the Details button to launch the related task implementation application.

For example, in a customer creation process, you see in your task list a task of creating customer ship-to information.

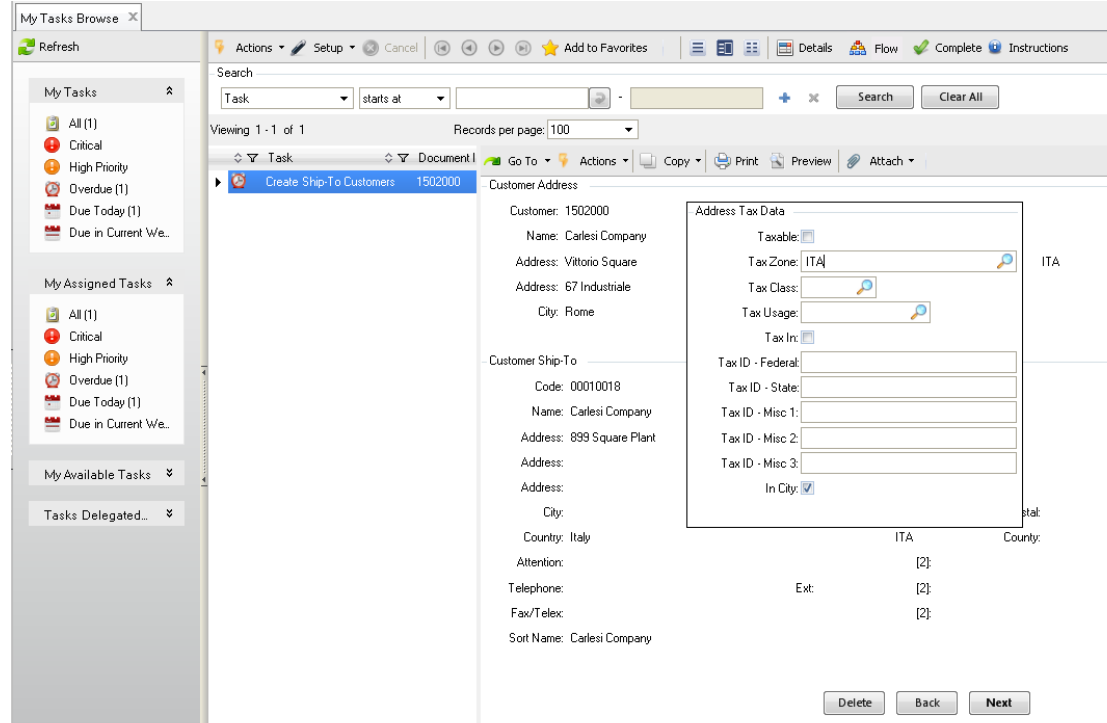
Fig. 2.16
Task Details



You double-click the task item or click the Details button and see the Customer Ship-To section for you to fill in. You fill in all the necessary information to create a ship-to for the customer, specifying the address, tax, contact details, and so on.

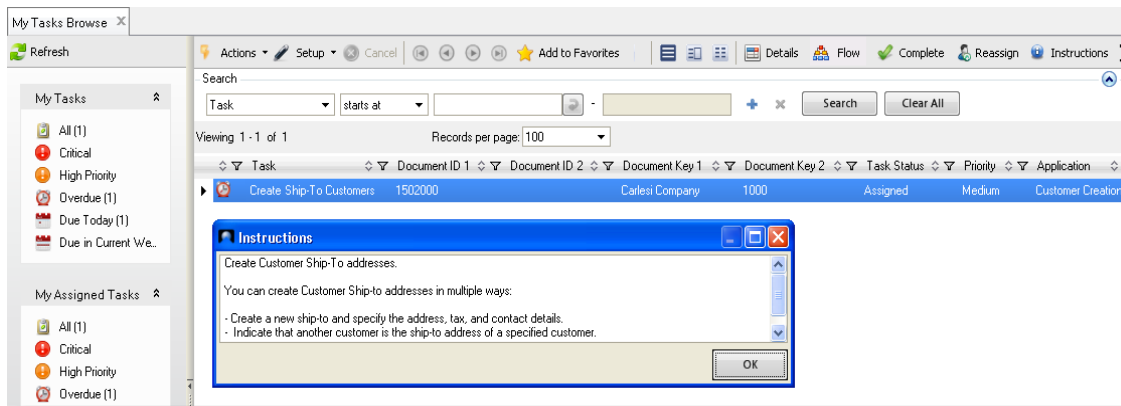
Note A task is not always a QAD EA function; it can also be a custom page.

Fig. 2.17
Perform a Task



Note If you are not sure what to do with a task, you can click the Instructions button; perhaps there are some instructions for you to perform the task.

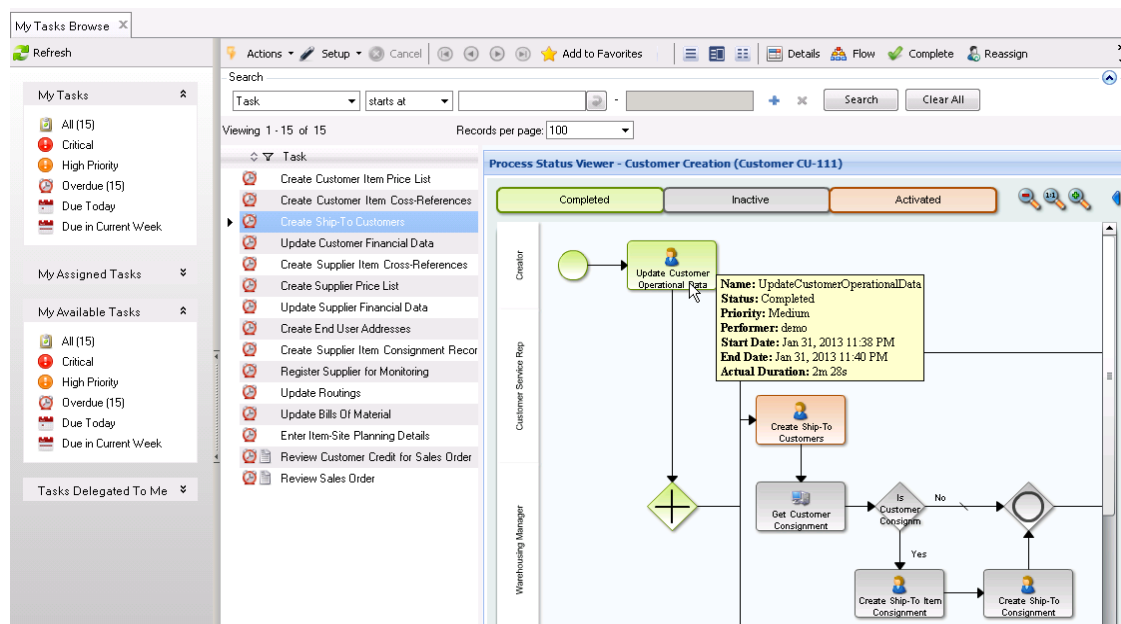
Fig. 2.18
Task Instructions



To see where your task is in the whole business process, click the Flow button.

Example Your task is to create the customer ship-to address; it is one work step in the business process of creating a customer. When you click Flow to view the whole process, you can get a better understanding of your task context, such as who performs what tasks in the process.

Fig. 2.19
View the Task Context



In the Flow view, you can double-click each work step of the business process to view their details and audit history. Figure 2.20 shows an example of viewing details of a work step in the customer creation process.

Fig. 2.20
View Work Step Details

Workstep Details - UpdateCustomerOperationalData

Details | Workitem(s) | Dataslots | Audit History

Workstep: Update Customer Operational Data

Start Date: Jan 31, 2013 11:38 PM

End Date: Jan 31, 2013 11:40 PM

Estimated Duration: 2 hrs

Performer: demo

Priority: Medium

Status: Completed

Workstep Details - UpdateCustomerOperationalData

Details | Workitem(s) | Dataslots | **Audit History**

Activity Name:	Update Customer Operational Data	Workstep Performer:	demo
Started on:	Jan 31, 2013 11:38 PM	Completed on:	Jan 31, 2013 11:40 PM
Expected duration:	2 hrs	Total duration:	2 min : 28 sec

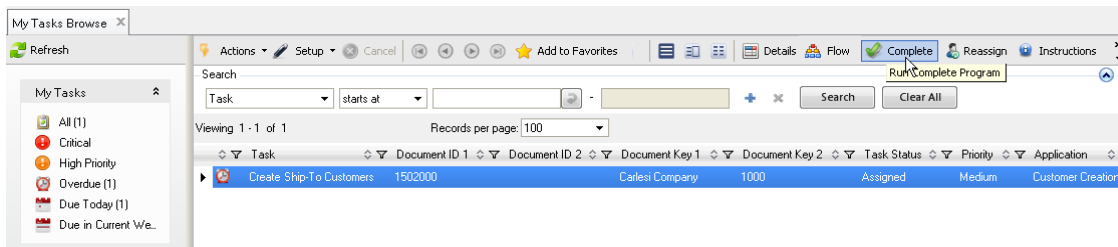
Date/Time	Activity (Group By)	Performer	Description
Jan 31, 2013 11:38 PM	Update Customer Operational Data		Activity created and activated
Jan 31, 2013 11:38 PM		demo	"UpdateCustomerOperationalData" created and assigned
Jan 31, 2013 11:40 PM		demo	"UpdateCustomerOperationalData" completed

Completing Tasks

After you perform the task, make sure that you click the Complete button in the application toolbar to complete the task.

Note Performing tasks in the task implementation application and completing tasks are two separate actions. In some cases, you want to quickly complete a task without actually performing the task—for example, you find that someone else has already done the necessary work. In such cases, simply click the Complete button to remove the task from your task list.

Fig. 2.21
Complete Tasks



The completed task is removed from your active task list to the History Browse. All your completed tasks are displayed in My Task History Browse.

Completing Tasks in the Approval Subprocess

As review and approval of a business document is a common practice in an organization, QAD provides a standard template for the approval process. The approval process can then be used as a subprocess in business processes. Figure 2.22 shows an example of a Cost Approval subprocess being used in the Item Cost Setup process.

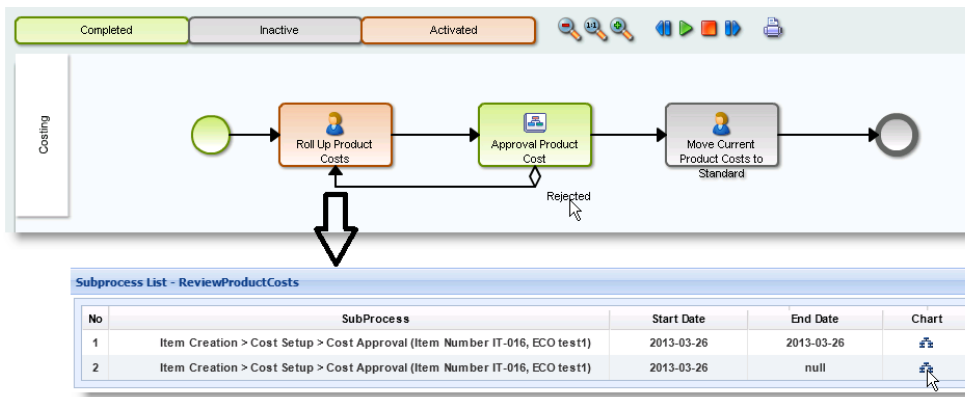
Note If you click the Reject button to reject approval, make sure that you provide reasons for the rejection.

Comments are automatically generated when the task is approved or rejected. Only when all requested approvers click the Approve button, the whole approval process is completed as Approved. Otherwise, the result of the approval process is Rejected. The result of the approval process is sent using email to the stakeholders.

Note Business process developers can define the stakeholder list.

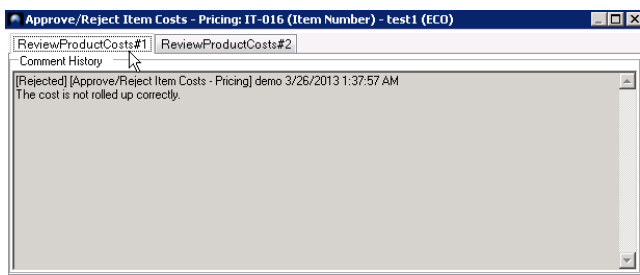
Example In the Item Cost Setup process, when the Cost Approval subprocess is shown as rejected, the previous work step—Roll Up Product Costs—is activated again. After the product costs are rolled up again, the Cost Approval subprocess starts a new cycle of approval.

Fig. 2.24
A New Cycle of Approval



When you click Approve or Reject to complete the work step in a new approval cycle, you can also see rejection reasons for previous cycles. See Figure 2.25. The number of the approval cycles is also displayed, so you can also tell how many times the approval subprocess has been executed.

Fig. 2.25
Rejection History



Reassigning Tasks

To reassign a task that was originally assigned to you:

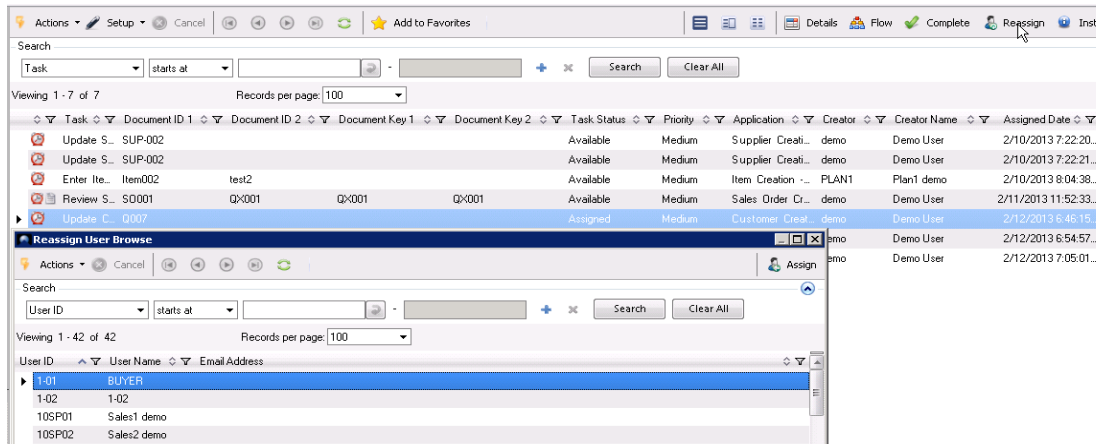
- 1 In your task list, select the task that you want to reassign to another user.

Note If you want to reassign many tasks to the same person, you can also choose multiple tasks.

- 2 Click the Reassign button in the application toolbar.
- 3 In the Reassign User Browse window, select a user for the task. You can select a user by the user ID, user name, or e-mail address.

Note If the task was originally assigned to a group of users, the Reassign User Browse displays only the group users and you can only select a user in the group.
- 4 In the Reassign User Browse window, double-click the selected user or click Assign.

Fig. 2.26
Reassign Your Task



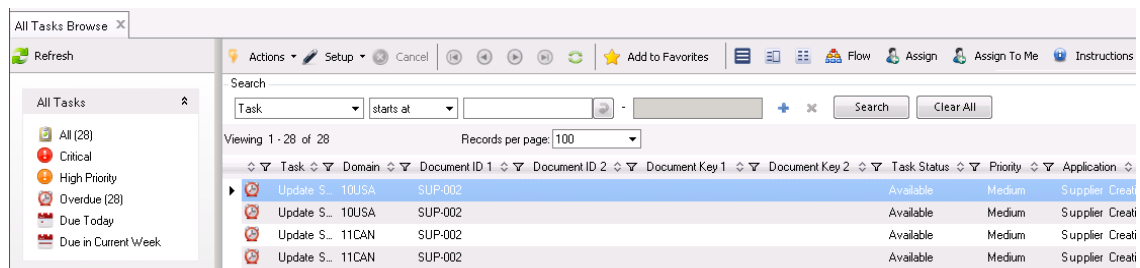
After you reassign the task, the task is removed from your task list and added to the assigned user's task list.

Using All Tasks Browse (for Administrators)

As an administrator (*qadadmin*), you can see all tasks. All to-do tasks are displayed in All Tasks Browse; all completed tasks are displayed in All Tasks History Browse.

You can get an overview of all tasks, including the performer ID and performer name for each task.

Fig. 2.27
All Tasks Browse

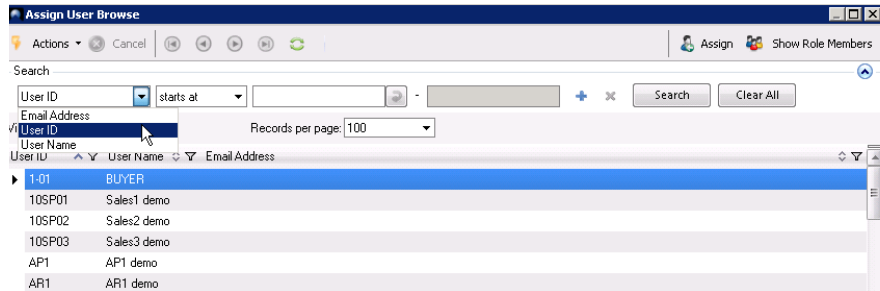


You can assign any to-be-completed task to any user, except inactive users.

- To assign a task to other users, whether the task was assigned or not, do the following:
 - a Click the Assign icon in the application toolbar.
 - b In the Assign User Browse window, select a user.

Note If the task was originally assigned to a group of users, the default view in the Assign User Browse displays only the group users. To see all users, click Show All Users.
 - c In the Assign User Browse window, double-click the selected user or click Assign.

Fig. 2.28
Assign a Task in All Tasks Browse



- To assign a task to yourself, you can do one of the following:
 - Click the Assign to Me icon in the application toolbar.
 - Double-click the task and then click Yes in the pop-up message box.

When you assign a task to yourself, you can see the Details and Complete buttons in the toolbar. Use these two buttons to perform and complete the task. Refer to “Performing a Task” on page 14 and “Completing Tasks” on page 16.

Delegating Tasks

You can delegate your tasks to other users. Rather than reassigning your individual tasks one at a time, you can use Delegate My Tasks to delegate some or all your tasks.

Note A delegated task cannot be re-delegated, but can be reassigned.

The function Delegate My Tasks provides two delegation options to you. The first option is to delegate all your assigned tasks to a single user. Alternatively, for each application, you can specify a user.

To delegate all your tasks to a single user:

- 1 Specify the user name in the *Delegate all tasks to* box.
- 2 Specify the start and end dates of the delegation period in the Start Date and End Date boxes.
- 3 Click Save.

To cancel delegation of all your tasks, select the check box in the Disable Delegation column header and click Save.

Fig. 2.29
Delegate all Tasks

To delegate for each application:

- 1 For each application, specify a user in the *Delegated To* box.
 - Click the Search User icon beside the text box to search for users in Delegate User Lookup.

Fig. 2.30
User Lookup

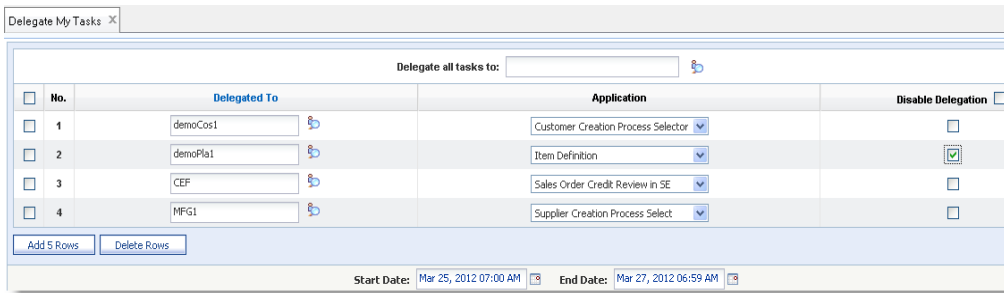
- 2 In the Application list, click the application that you want to delegate.
- 3 If you want to disable delegation of tasks in a particular application, select the check box in the Disable Delegation column.

Note You can delegate only at the application level, and not at a specific task level. The system delegates all tasks in an application to the specified user.

- 4 Specify the start and end dates of the delegation period in the Start Date and End Date boxes.
- 5 To add rows for delegating more applications, click Add 5 Rows. To remove unwanted rows, select their respective check boxes in the first column, and then click Delete Rows.

6 Click Save.

Fig. 2.31
Delegate Applications



After your tasks are delegated, the delegated people can see the tasks in their Tasks Browse and work on them. But you can still work on these tasks in your Tasks Browse, even though you have delegated them to others.

Using Processes Browse

Use the Processes Browse to manage business process instances. You can use the Processes Browse to make sure that all work steps in the process are in control.

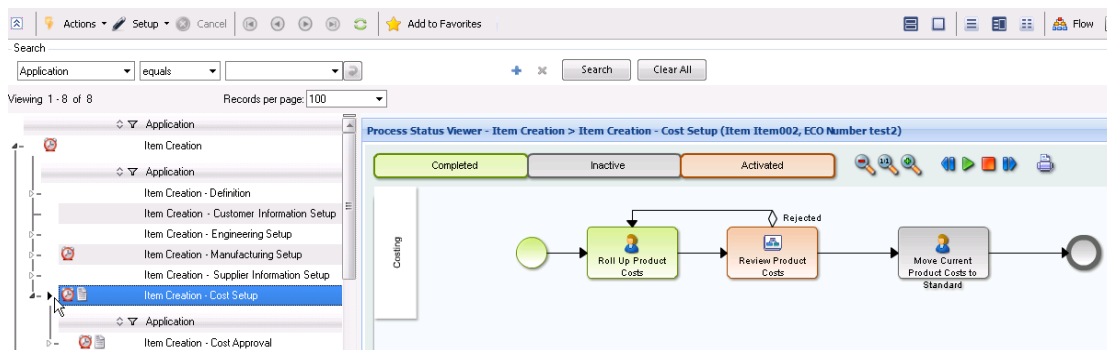
You can see values of document IDs and document keys, in brackets, in the process name display; the display of these values makes the process name display more meaningful.

Viewing Process Instances

A process can contain a hierarchy of subprocesses and tasks. You can select a process instance in the browse view and click the small expansion icon to view its subprocesses.

For more information about the relationship between a process and its subprocesses, see “Understanding Business Process Structure” on page 8.

Fig. 2.32
Multilevel Expansion



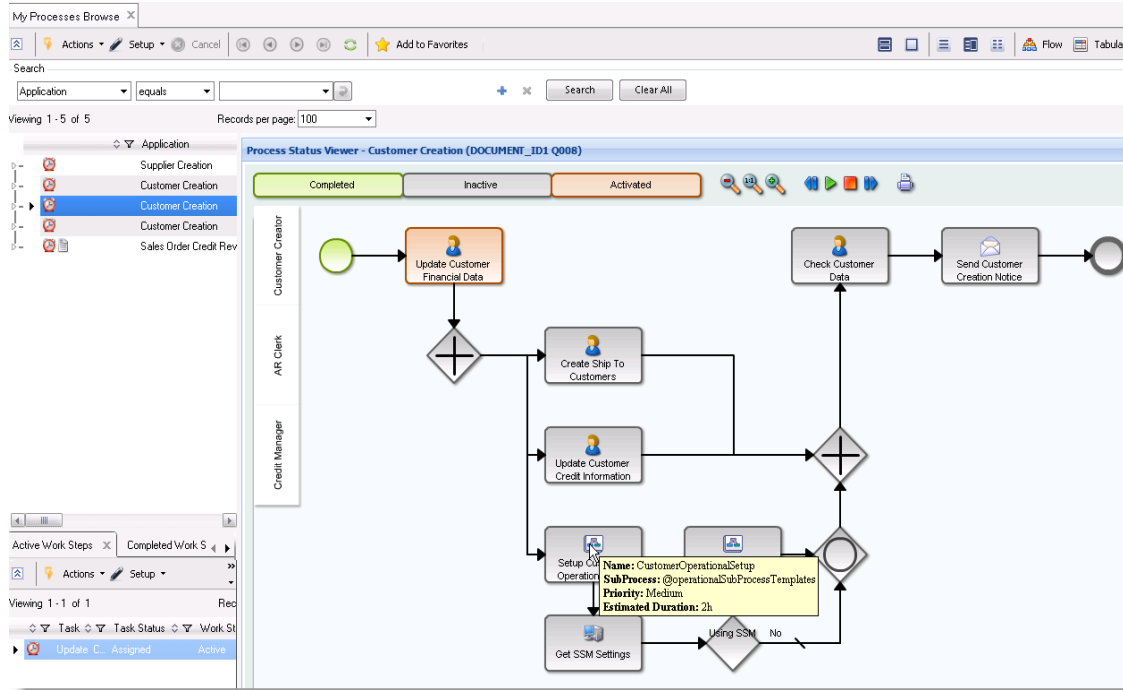
For each process instance or subprocess instance, you can see its status by the Flow view or the Tabular view.

Flow View

To view a process instance in a flowchart, you can do one of the following:

- Double-click a process instance.
- Select a process instance and click the Flow button in the application toolbar.

Fig. 2.33
Flow View



Different work step colors have different meanings:

- Green: work step completed
- Orange: work step activated
- Gray: work step inactive
- Blue: work step skipped
- Red: work step suspended
- Dark green: work step monitoring in wait state

If you want to see how the completed work steps have changed status in an animated way, click the Auto Play icon.

Fig. 2.34
Auto Play



- Previous Step: Click the Previous Step icon to go back one work step at a time from the point where the playback was stopped.

- Auto Play: Click the Auto Play icon to start the event playback. The events are processed sequentially.
- Stop Auto Play: Click the Stop Auto Play icon to stop the playback at any point.
- Next Step: Click the Next Step icon to step forward one work step at a time from the point where the playback was stopped.
- Print: Click the Print icon to print the Flow view.

Tabular View

Select a process instance and click the Tabular icon in the application toolbar, then you can see each work step displayed in a tabular format.

The Tabular View displays the Start work step as the first work step at the top of the list. The remaining work steps show in the order of their completion.

Fig. 2.35
Tabular View

Tabular View - Supplier Creation (Supplier SUP-003, DOCUMENT_ID2 10-C1003)								
No.	Workstep	Performer	Estimated Duration	Start Date	End Date	Priority	Status	Action
1	Start	-		Aug 27, 2013 05:37 PM	Aug 27, 2013 05:37 PM		Completed	
2	Update Supplier Financial Data	demo	2 hrs	Aug 27, 2013 05:37 PM	Aug 27, 2013 05:39 PM	Medium	Completed	
Workitem(s) Total: 1						Show All		
3	Setup Supplier Branch	-	1 hrs	Aug 27, 2013 05:39 PM	Aug 27, 2013 05:39 PM	Medium	Completed	
4	Setup Supplier Operational Data	-	2 hrs	Aug 27, 2013 05:39 PM		Medium	Activated	
5	Update Supplier Credit Information	AP	2 hrs	Aug 27, 2013 05:39 PM		Medium	Suspended	
Workitem(s) Total: 1						Show All		

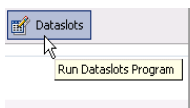
Different work step colors have different meanings:

- Green: work step completed
- Orange: work step activated
- Gray: work step inactive
- Blue: work step skipped
- Red: work step suspended
- Dark green: work step monitoring in wait state

Viewing Dataslots

In BPM, a dataslot is a data placeholder associated with a process that persists through the entire process and defines the information flow of the business process. The dataslot values can be helpful, for example, in process debugging. You can access the dataslot information for the process instance by clicking the Dataslots button in the application toolbar.

Fig. 2.36
Dataslots button



Notice that you can only view the information displayed on the View Dataslots page. If you want to change the dataslot information for the process instance, you can contact the BPM Portal administrator.

Fig. 2.37
View Dataslots Information

View Dataslots - Supplier Creation (Supplier SUP-003, DOCUMENT_ID2 10-C1003)	
baseApprovalSubprocessCount::	<input type="text" value="1"/>
Creator:	<input type="text" value="demo"/>
creditorId::	<input type="text" value="1118005606"/>
Disallow Delete:	<input checked="" type="radio"/> Yes <input checked="" type="radio"/> No
Disallow Modify:	<input checked="" type="radio"/> Yes <input checked="" type="radio"/> No
Document ID 1:	<input type="text" value="SUP-003"/>
Document ID 2:	<input type="text" value="10-C1003"/>
Document Key 1:	<input type="text" value="NPRD"/>
Document Key 2:	<input type="text" value="USD"/>
Document Rejected:	<input checked="" type="radio"/> Yes <input checked="" type="radio"/> No
Document Status:	<input type="text" value="approved"/>
Domain:	<input type="text" value="10USA"/>
Email From Address:	<input type="text" value="bpm-admin@qad.com"/>
End Date:	<input type="text"/>
engChangeDate::	<input type="text"/> <input type="button" value="..."/>
engChangeInitiator::	<input type="text"/>

Updating Work Steps

Besides viewing work step statuses, you can also update information for work steps either in the Flow view or in the Tabular view.

Note Completed work steps cannot be updated.

Updating Work Steps in the Flow View

To update a work step in the Flow view:

- 1 Click the work step from the flowchart to open the Workstep Details window.
- 2 To modify an active or suspended work step:
 - You can select an option from the Priority drop-down list to update the priority for the work step.

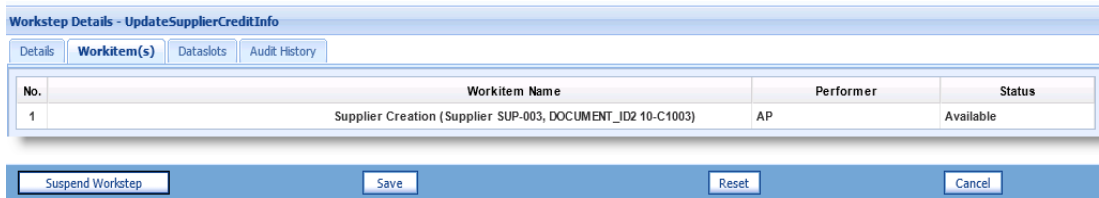
Fig. 2.38
Update Work Step in Flow View

Workstep Details - CreateShipToCustomers	
<input checked="" type="button" value="Details"/> <input type="button" value="Workstep(s)"/> <input type="button" value="Dataslots"/> <input type="button" value="Audit History"/>	
Workstep: Create Ship-To Customers	
Start Date:	Jan 31, 2013 11:40 PM
Estimated Duration:	2 hrs
Performer:	CSR
Priority:	<input type="text" value="Medium"/>
Status:	Activated

- You can also suspend or resume a work step.

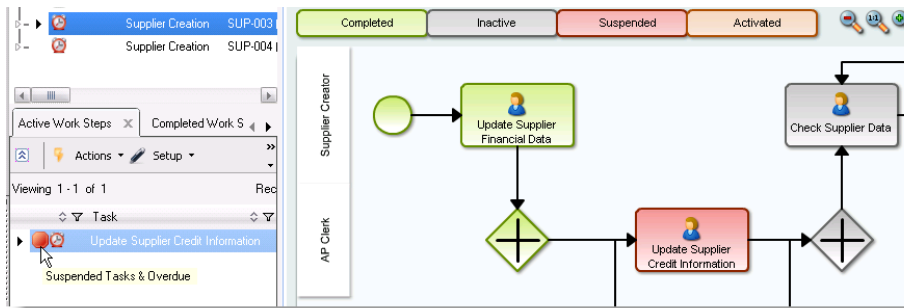
Example If you want to suspend a work step, you click Suspend Workstep. This action changes the work step color to red. The system temporarily stops the process at the suspended work step.

Fig. 2.39
Suspend Work Step



When the current suspended work step is a human task, the suspended task is removed from the Tasks Browse. Here you can see the red suspension icon displayed in the Active Work Steps child browse.

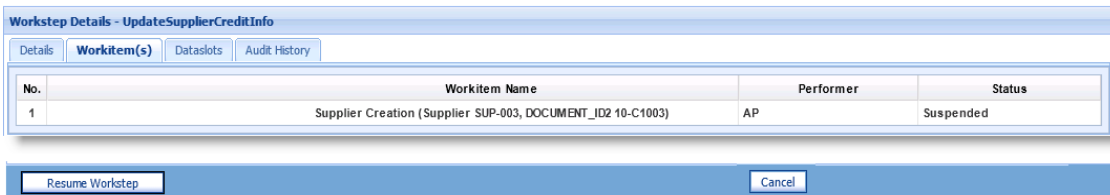
Fig. 2.40
Suspended Task



While a work step can be manually suspended, a work step in a process can also be in a suspended status when a background process fails. In this situation, the system temporarily stops the process at the suspended work step, until the issue causing the suspension is resolved.

To resume a suspended work step, click Resume Workstep.

Fig. 2.41
Resume Work Step



To view how a work step has been updated, use Audit History.

Updating Work Steps in the Tabular View

To update work steps in the Tabular view, you can do the following and save your changes:

- Select an option from the Priority drop-down list to update the priority for the work step. Make sure that you select Update from the Action drop-down list to make the priority change effective.

Fig. 2.42
Update Work Step Priority

Tabular View - Supplier Creation (Supplier SUP-003, DOCUMENT_ID2 10-C1003)								
No.	Workstep	Performer	Estimated Duration	Start Date	End Date	Priority	Status	Action
1	Start	-		Aug 27, 2013 05:37 PM	Aug 27, 2013 05:37 PM		Completed	
2	Update Supplier Financial Data	demo	2 hrs	Aug 27, 2013 05:37 PM	Aug 27, 2013 05:39 PM	Medium	Completed	
						Workitem(s) Total: 1		Show All
3	Setup Supplier Branch	-	1 hrs	Aug 27, 2013 05:39 PM	Aug 27, 2013 05:39 PM	Medium	Completed	
4	Setup Supplier Operational Data	-	2 hrs	Aug 27, 2013 05:39 PM		Medium	Activated	
5	Update Supplier Credit Information	AP	2 hrs	Aug 27, 2013 05:39 PM		Medium	Suspended	Update Suspend
						Workitem(s) Total: 1		Show All

- Suspend or resume a work step by selecting the option from the Action drop-down list. As you can see, in the Tabular view, you can update more than one work step.

Example You can suspend one work step and resume another work step at the same time.

Fig. 2.43
Update Work Steps in Tabular View

Tabular View - Supplier Creation (Supplier SUP-003, DOCUMENT_ID2 10-C1003)								
No.	Workstep	Performer	Estimated Duration	Start Date	End Date	Priority	Status	Action
1	Start	-		Aug 27, 2013 05:37 PM	Aug 27, 2013 05:37 PM		Completed	
2	Update Supplier Financial Data	demo	2 hrs	Aug 27, 2013 05:37 PM	Aug 27, 2013 05:39 PM	Medium	Completed	
						Workitem(s) Total: 1		Show All
3	Setup Supplier Branch	-	1 hrs	Aug 27, 2013 05:39 PM	Aug 27, 2013 05:39 PM	Medium	Completed	
4	Setup Supplier Operational Data	-	2 hrs	Aug 27, 2013 05:39 PM		Medium	Activated	Suspend
5	Update Supplier Credit Information	AP	2 hrs	Aug 27, 2013 05:39 PM		Medium	Suspended	Resume
						Workitem(s) Total: 1		Show All

Viewing Audit Trail

For a process instance, the system maintains a complete transactional audit trail.

Select a process instance and click Audit, you can see detailed information about the process instance such as instance creator, start date and time, and elapsed time.

Note The process instance completion date and time, along with total duration and elapsed time, can be displayed only for completed process instances.

Fig. 2.44
Audit Trail

Audit History - Supplier Creation (Supplier SUP-003, DOCUMENT_ID2 10-C1003)			
Created by:	demo		
Started on:	Aug 27, 2013 05:37 PM		Completed on:
Expected duration:	2 hrs		Total duration:
Status:	Activated		Elapsed time: 1 day(s) : 8 hrs
Date/Time ▲	Activity (Group By)	Performer	Description
Aug 27, 2013 05:37 PM	Start		Activity created and activated
Aug 27, 2013 05:37 PM			Activity completed
Aug 27, 2013 05:37 PM	Update Supplier Financial Data		Activity created and activated
Aug 27, 2013 05:37 PM		demo	"UpdateSupplierFinancialData" created and assigned
Aug 27, 2013 05:39 PM		demo	"UpdateSupplierFinancialData" completed
Aug 27, 2013 05:39 PM			Activity completed
Aug 27, 2013 05:39 PM	Setup Supplier Operational Data (Sub Process)		Activity created and activated
Aug 27, 2013 05:39 PM	Update Supplier Credit Information		Activity created and activated
Aug 28, 2013 04:16 PM		AP	Activity Suspended

You can also view the following information.

Date/Time. Displays the date and time of the activity transactions. You can sort the audit data by clicking the column header.

Activity (Group By). Displays the name of each task in the process.

Performer. Displays the name of the performer to whom each task is assigned.

Description. Describes the status change of the process instance or the activity transaction.

Data Changes. Available only for completed tasks.

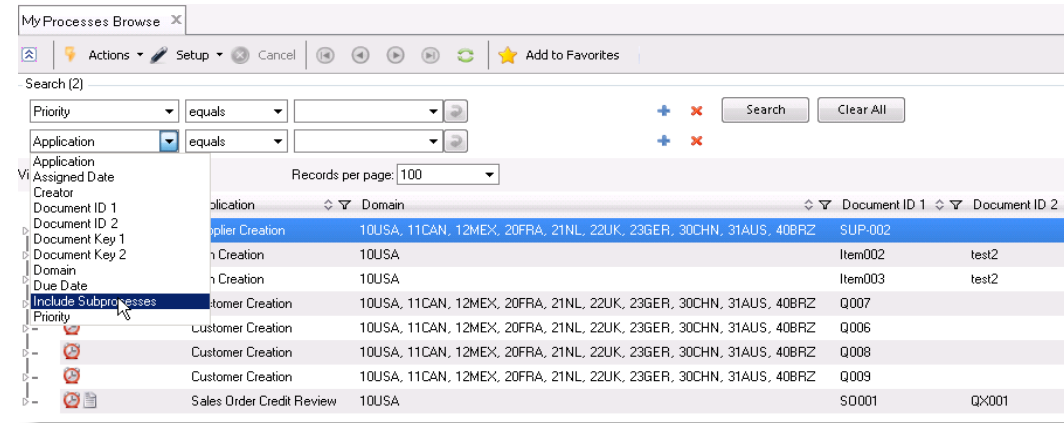
Searching Process Instances

To search for a specific process instance, you can use the fields in the Search Panel.

Example If you want to find out the processes that you have created, you can use the search field Creator.

Example If you want to search for subprocess instances, set Include Subprocesses to true. For more information about subprocesses, see “Understanding Business Process Structure” on page 8.

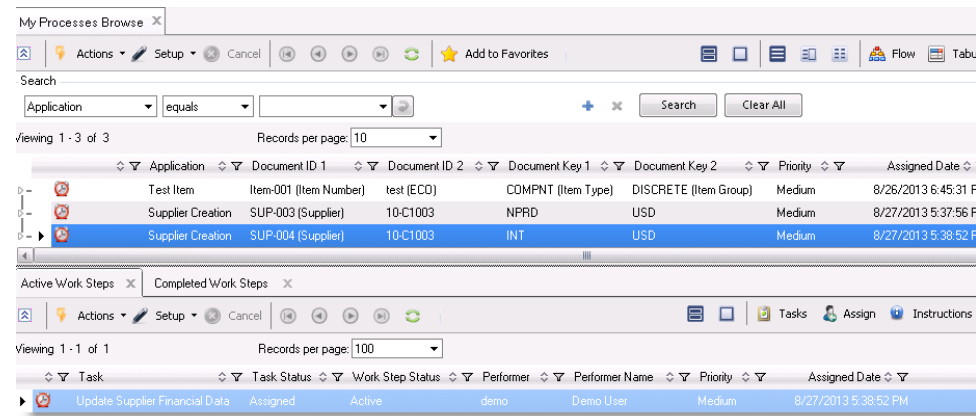
Fig. 2.45
Search for Subprocesses



Bringing up Tasks Browse from Processes Browse

Select the Tile screen view of a process, and you can see some work steps of the process in a child browse. From the child browse, you can see currently active work steps as well as work steps that have been completed.

Fig. 2.46
Child Browse for Work Steps



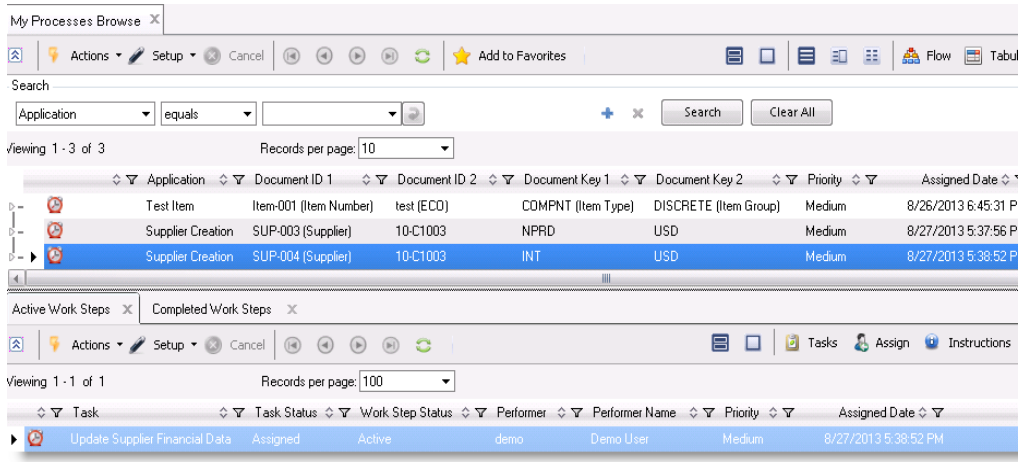
From this child browse, you can bring up the Tasks Browse by doing either of the following:

- Double-click an active work step in the child browse.
- Select an active work step and click the Tasks button in the application toolbar.

Assigning Tasks from Processes Browse

Select the Tile screen view of a process, and you can see some work steps of the process in a child browse.

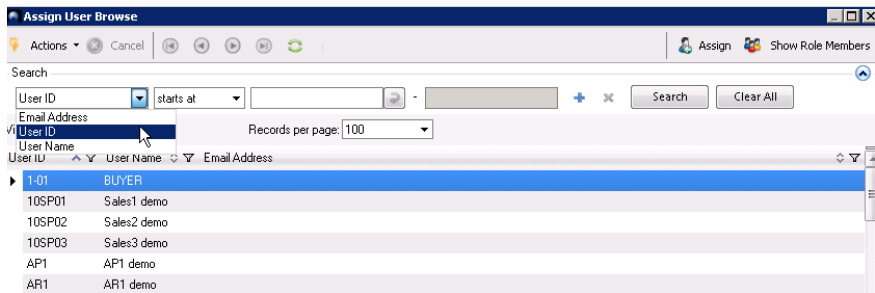
Fig. 2.47
Assign Tasks from Processes Browse



In the Active Work Steps screen, you can assign a task to a user according to your choice, regardless of whom the task was originally assigned to.

- 1 In the Active Work Steps screen, select the task.
- 2 Click the Assign button in the application toolbar.
- 3 In the Assign User Browse window, select a user. You can select a user by the user ID, user name, or e-mail address. To see all users, click Show All Users.
- 4 In the Assign User Browse window, double-click the selected user or click Assign.

Fig. 2.48
Assign a Task in Processes Browse



Using All Processes Browse (for Administrators)

As an administrator (*qadadmin*), you can see all process instances in all domains. All active process instances are displayed in All Processes Browse; all completed process instances are displayed in All Processes History Browse.

You can get an overview of all process instances and manage all active process instances. For more information, refer to “Viewing Process Instances” on page 22 and “Viewing Audit Trail” on page 28.

You can also assign any to-be-completed task in the process instances to any user, except inactive users. For information about how to assign tasks, see “Viewing Audit Trail” on page 28.

Using History Browse

When a task is completed, it is removed from the Tasks Browse to the Tasks History Browse. When all the tasks in the process instance are completed, the process instance is completed and removed from the Processes Browse to the Processes History Browse.

The History Browsers are for you to view the completed tasks and process instances:

- View all your completed tasks in My Task History Browse.
- View all completed processes that were previously in My Process Browse.

If you are an administrator (*qadadmin* role), you can also:

- View all completed tasks in All Tasks History Browse.
- View all completed process instances in All Processes History Browse.

Note The End Date information indicates when a task or process was completed. You can see the End Date information in History Browse.

Fig. 2.49
End Date

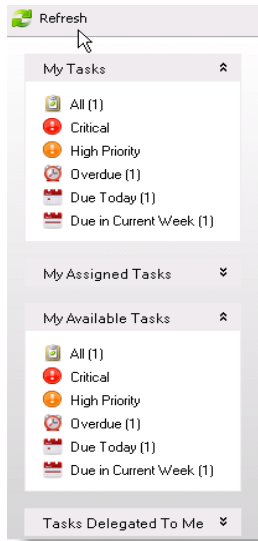
The screenshot shows the 'My Task History Browse' window. At the top, there are navigation buttons like 'Actions', 'Setup', 'Cancel', and 'Add to Favorites'. Below that is a search bar with a dropdown menu set to 'End Date' and a search button. The main area displays a table with the following columns: Task, Application, Assigned Date, Due Date, and End Date. The 'End Date' column is highlighted in blue. The table contains one row with the following data: Task: Review Sales Order, Application: Sales Order Credit Review, Assigned Date: 9/17/2012 10:45:39 PM, Due Date: 9/18/2012 12:45:39 AM, and End Date: 9/17/2012 10:46:55 PM.

Task	Application	Assigned Date	Due Date	End Date
Review Sales Order	Sales Order Credit Review	9/17/2012 10:45:39 PM	9/18/2012 12:45:39 AM	9/17/2012 10:46:55 PM

Refreshing Browse Views

Sometimes you want to refresh your task list display in Tasks Browse. For example, when someone is performing a task, it is possible that the displayed task list becomes out of date and you want to refresh the view.

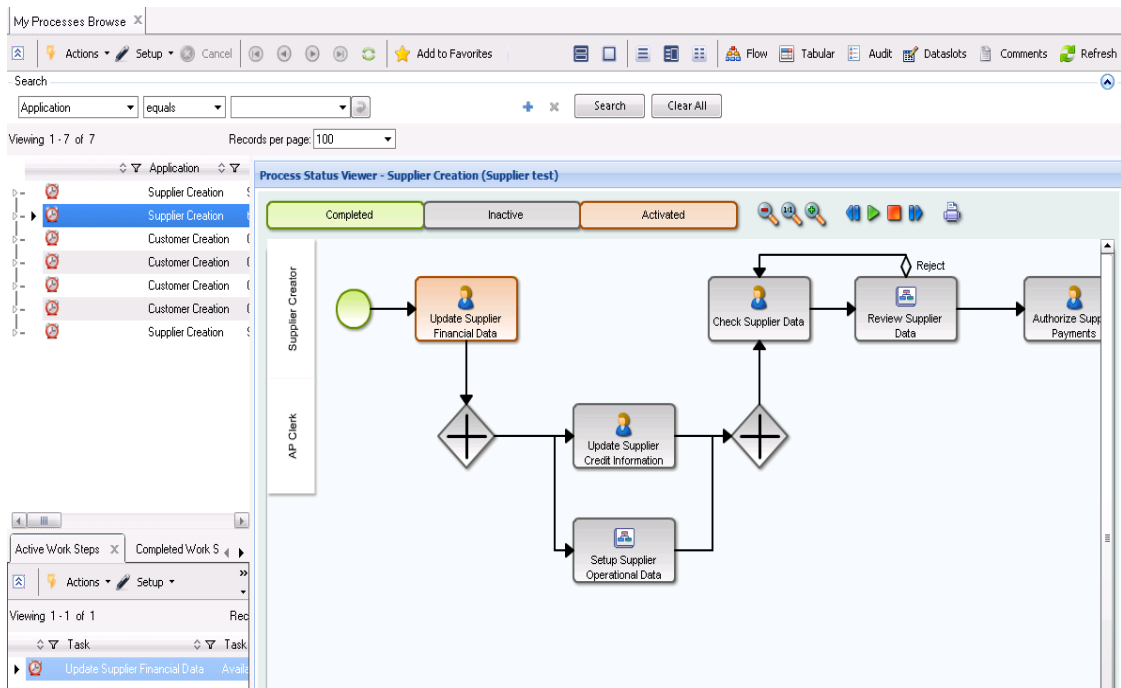
Fig. 2.50
Refresh in Tasks Browse



You can also use the Refresh button in the Processes Browse to view the work step status change.

For example, while you are opening the flow view of a process, another user is performing a task in the process. Then you can use the Refresh button to see the process status change. In this example, you can see the color of the work step changes from orange (work step activated) to green (work step completed).

Fig. 2.51
Refresh in Processes Browse



Adding and Viewing Process Comments

Adding Comments

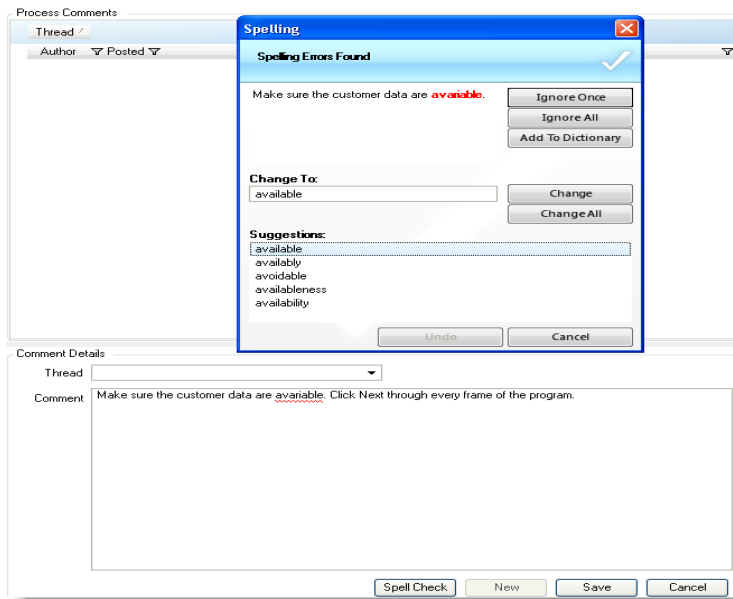
Whether you are a task performer or an admin user, you can add comments to an active process. Users who later work in the process can read your comments and add comments of their own if necessary.

Note Once a comment is added, the comment remains for the life of the process and cannot be removed or modified.

To add a comment:

- 1 Select a task or a process instance.
 - Note** Adding comments applies only to active process instances, so do not use the History Browse where completed tasks and processes are listed.
- 2 Click the Comments button in the application toolbar.
- 3 In the Comment Details panel, click New to add a subject title (thread) and detailed comment contents.
 - Note** In the text box, red wavy lines under words indicate spelling mistakes. You can click the Spell Check button to see correction suggestions.
- 4 Verify the comment and click Save.

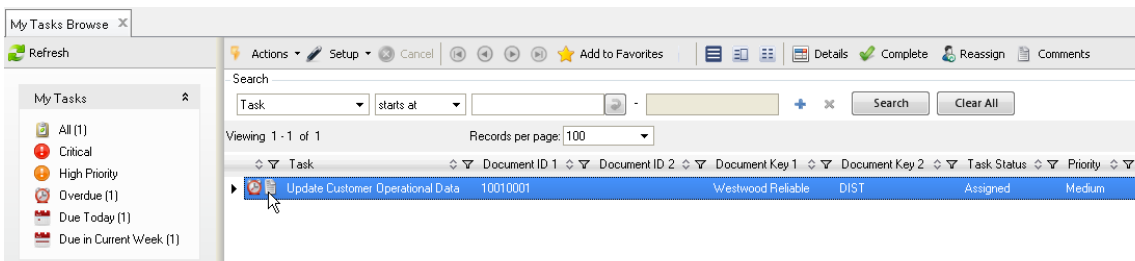
Fig. 2.52
Add Comments to a Process



Viewing Comments

You can tell whether there is a process comment by the Comments icon displayed in the summary View panel.

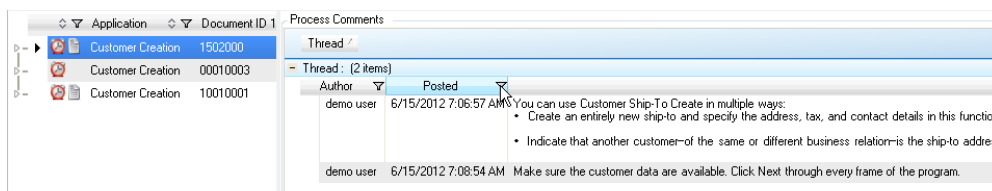
Fig. 2.53
View Comments



To view detailed contents of the comments, click the Comments button in the application toolbar; the comments are displayed in the Thread panel of the Process Comments screen.

Note There can be multiple comments on one process. You can sort comments by using filters in the Thread panel.

Fig. 2.54
Filter Comments



Maintaining Process Ownership (for Administrators)

As an administrator (*qadadmin*), you can use Process Ownership Maintenance to define which role is responsible for which business process.

Example For the Sales Order Credit Review process, the Credit Manager role is responsible. To define this relationship, you can use Process Ownership Maintenance.

- 1 In the Application field, search for the Sales Order Credit Review process.

Fig. 2.55
Process Ownership Maintenance

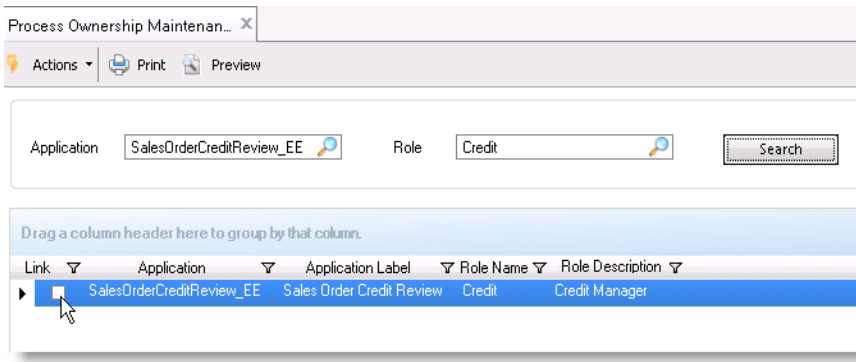
- 2 In the Role field, search for the Credit Manager role. You can search by either role name or role description.

Fig. 2.56
Search Role

Role Name	Role Description	Active
SuperUser	SuperUser Role	yes
EmployeeNotify	Employee Create	yes
SupplierNotify	Supplier Create	yes
CustomerNotify	Customer Create	yes
EndUserNotify	EndUser Create	yes
qadadmin	QAD Admin	yes
uidesign	User Interface Design	yes
rptDsgn	Report Design	yes
rptAdmin	Report Administration	yes
ProductTrxns	Enter Product Trans...	yes
ProductModify	Create/Update Produ...	yes
InventoryModify	Change Inventory Da...	yes

- 3 Click the Search button.
- 4 Select the Link check box and click Save.

Fig. 2.57
Define Process Ownership



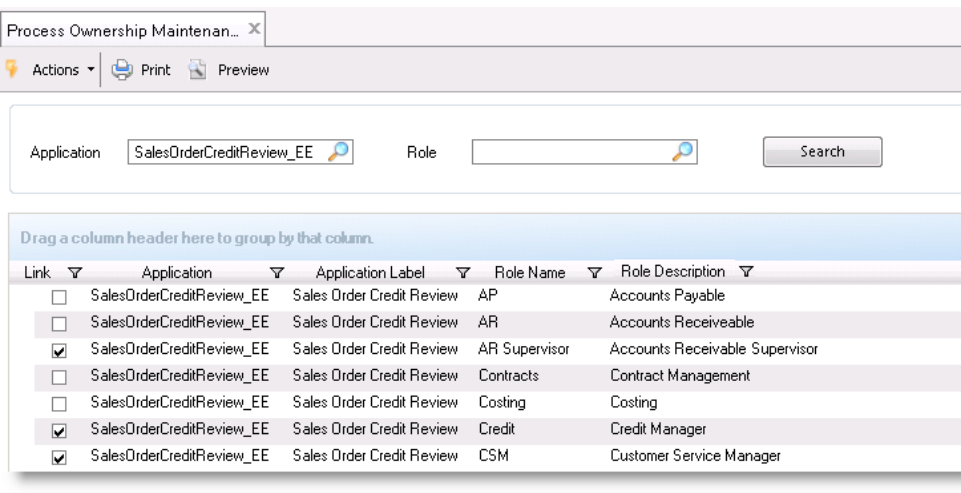
The process ownership definition can be exported to an Excel work sheet. Right-click the screen and select Export to Excel.

There are situations where one role is responsible for multiple processes. There are also situations where multiple roles are responsible for one process. In such situation, the relationship between the Application field and the Role field is not restricted as one-to-one.

Example For the Sales Order Credit Review process, not only the Credit Manager role is responsible, Accounts Receivable Supervisor, and Customer Service Manager roles are also responsible.

To link this one process with multiple responsible roles, you can leave the Role field blank and then select the roles that you want to select.

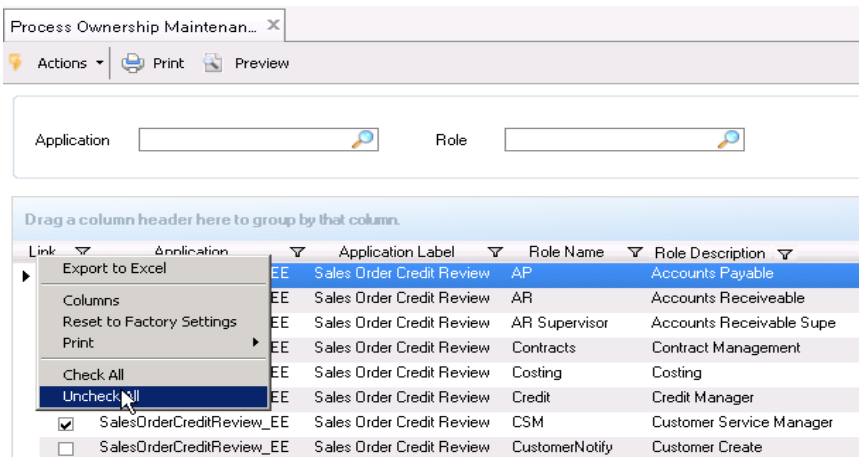
Fig. 2.58
Define Process Ownership



If you leave both the Application field and the Role field blank, the system displays all possible associations for you to select. Notice that you can group data in the grid or sort or rearrange columns to make your selection operation more convenient. To return to the default column display settings, you can right-click on the screen and select Use Reset to Factory Settings.

If you want to cancel all previous process ownership definitions, you can right-click Link and select Uncheck All.

Fig. 2.59
Cancel All Process Ownership



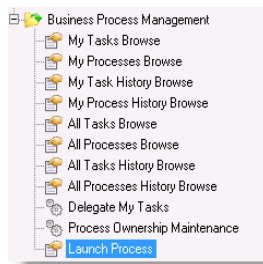
Launching Processes from Custom Forms (for Authorized User)

The system allows users to create a launch screen in QAD .NET UI to launch a process from custom forms. The application developer defines the process in BPM Studio and the administrator adds a menu entry for the application menu to show up in .NET UI. Then users can see the launch process menu in QAD .NET UI and use it to launch the customized process.

Note Only authorized users can see the launch process menu and use it.

When the .NET UI user clicks the launch process menu, the custom launch screen appears. Then the .NET UI user can click the Create button to launch the process.

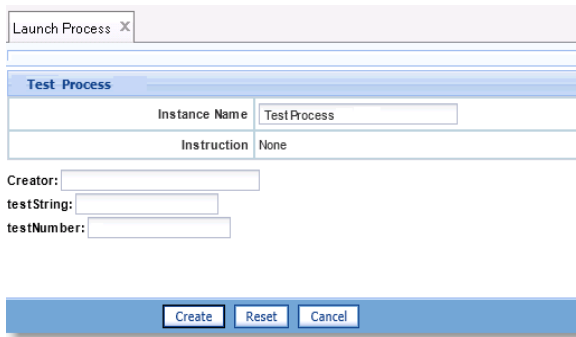
Fig. 2.60
Launching Processes



Depending on how the application developer has defined the process in BPM Studio, fields on the launch screen can be editable or not. If the fields are editable, the .NET UI user can provide some information for the fields.

Example The application developer has defined dataslots of Creator, testString, and testNumber for the Test Process and made the fields editable. Then the .NET UI user can enter some field values for the process and click the Create button to launch the process.

Fig. 2.61
Custom Launch Screen in QAD .NET UI



Customizing Your User Interface

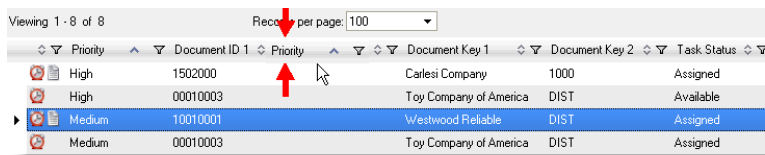
You can customize your user interface to make it more convenient for you.

Rearranging Columns

You can change the order in which the columns are displayed according to your needs.

To change the order of columns, drag and drop the column header. You can see the new position of the selected column that is indicated by two arrows.

Fig. 2.62
Rearrange Column Order

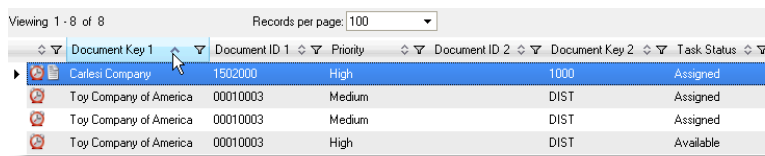


Sorting a Column

To sort a column, click the column and choose a sorting option.

- An upward pointing triangle beside the column header indicates that the items are sorted in ascending order.
- A downward pointing triangle beside the column header indicates that the items are sorted in descending order. To sort them in ascending order, click the column header again.

Fig. 2.63
Sort a Column



Filtering a Column

You can filter the results in a column using the browse column filter. Each column includes a filter so that you can refine the browse to display the data of interest.

To filter a column, click the funnel icon in the column header.

Fig. 2.64
Filter a Column

Document.Key 1	Document.ID 1	Priority	Document.ID 2	Document.Key 2	Task Status
(All)	1502000	High	1000		Assigned
(Custom)	00010003	Medium	DIST		Assigned
(Blanks)	00010003	Medium	DIST		Assigned
(NonBlanks)	00010003	High	DIST		Available
Carlesi Company	00010003	High	DIST		Available
Toy Company of America	00010003	Medium	DIST		Available
Westwood Reliable	00010003	Medium	DIST		Available

Along with items displayed for the column, there are other options: (All), (Custom), (Blanks), and (NonBlanks).

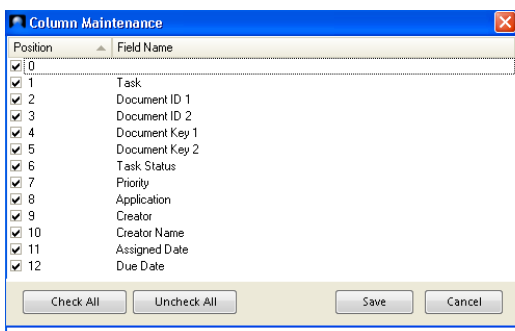
- To filter the column to display all data, choose (All). This value is the default.
- To filter the column according to some custom criteria, choose (Custom).
- To filter the column to include only blank items, choose (Blanks).
- To filter the column to display everything except blank items, choose (NonBlanks).

Maintaining Columns

By default all available columns are displayed in your browse view. But you can customize the view by selecting certain columns.

- 1 Right-click any column header and select Columns to open the Column Maintenance window.
- 2 In the Column Maintenance window, select your desired columns.

Fig. 2.65
Display Columns



Grouping Records

You can group records in a browse by column. To group records by a column, right-click the column header and select Group by the column header name.

Each group in the list can be expanded—to view the details—using the plus sign next to the group.

You can also add other columns to the grid to create a group hierarchy.

Fig. 2.66
Group Records

Performer	Document ID 1	Document ID 2	Document Key 2	Task Status	Application	Performer Name
+ Document Key 1: Carlesi Company (1 item)						
- Document Key 1: Toy Company of America (2 items)						
- Priority: Critical (2 items)						
CSR	00010003		DIST	Available	Customer Creat...	Customer Sales Rep
demoPP1	00010003		DIST	Assigned	Customer Creat...	demo PP1
- Priority: Medium (4 items)						
CSR	00010003		DIST	Available	Customer Creat...	Customer Sales Rep
demoAR1	00010003		DIST	Assigned	Customer Creat...	demo AR1
demoAR2	00010003		DIST	Assigned	Customer Creat...	demo AR2
SSMAdmin	00010003		DIST	Available	Customer Creat...	SSM Administrator
+ Document Key 1: Westwood Reliable (1 item)						

To ungroup the data, right-click the column header and select Remove Grouping.

Adding Browsers to Favorites

If you want to save your browse search criteria for reuse, you can add the specific browse to Favorites. For example, you want to keep your tasks for different processes separate. To add a customized browse to Favorites, set the search criteria in your Tasks Browse, and click the Add to Favorites button. Then the customized browse is added to the Favorites menu area. One at a time, you can add multiple customized browses to your Favorites.

To remove a browse from your Favorites, right-click the browse in the Favorites menu area and right-click Remove.

You can automatically start any favorite menu item when you log in to the QAD .NET UI. For the menu item saved under Favorites, right-click the item and select Auto Start. With Auto Start selected, the menu item starts automatically at your next log-in.

Tasks Notification

You can get email notifying that you have BPM tasks to do, when all the following setup tasks have been completed:

- The BPM Portal administrator has set up the system calendars and assigned one to you.
Note The administrator can also configure the times at which the notifications are sent.
- Your email address has been specified in QAD EA.
- You have subscribed to BPM Tasks Notification. To subscribe BPM Tasks Notification, go to Tools|Options in QAD EA and select True for the Subscribe to Tasks Notification Email option. By default, the option has already been True if your email address is specified in QAD EA.

Fig. 2.67
Subscribe to Tasks Notification

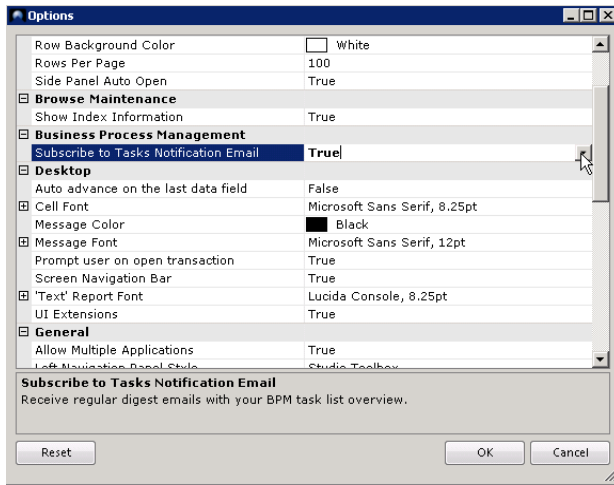


Figure 2.68 is an example of a notification email, which gives you a summary of your BPM tasks.

Fig. 2.68
Notification Email

Domain: 10USA(USA Division)

New tasks assigned to you after Fri Jul 27 15:42:00 PDT 2012:

None

Current tasks:

6 Assigned tasks

1 Available tasks

0 Delegated tasks

of these tasks 5 are overdue and 0 are critical.

[Click here to view your tasks.](#)

Domain: 11CAN(Canada Division)

New tasks assigned to you after Fri Jul 27 15:42:00 PDT 2012:

None

Current tasks:

5 Assigned tasks

0 Available tasks

0 Delegated tasks

of these tasks 3 are overdue and 0 are critical.

[Click here to view your tasks.](#)

When you get tasks notification email, click the link in the email that directs you to My Tasks Browse in QAD BPM. Then you can see your tasks to do in My Tasks Browse.

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