User Guide

QAD Business Process Management (QAD BPM)

70-3294-2.2
QAD BPM 2.2
March 2016

BPM_UG_v022.pdf/c6s/p9w

QAD Inc.
100 Innovation Place
Santa Barbara, California 93108
Phone (805) 566-6000
http://www.qad.com

Contents

BPM User Guide Change Summary

The following table summarizes significant differences between this document and the last published version.

Date/Version	**Description**	**Reference**
March 2016/BPM 2.2	Rebranded for BPM 2.2	--
March 2015/BPM 2.1	Added information on performing a task from a custom JSP page	Page 15
September 2014/BPM 2.0	Updated the button display in the application toolbar	-
	Updated the section about tasks notification	Page 44

Chapter 1

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

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 (the *qadadmin* role), who administrate all business processes and 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.

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 to do and how to do it. BPM adds the dimensions of who is responsible for the tasks and when to do the tasks.

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 archived to the History 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 archived to the History 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 *QAD Security and Controls User Guide*.

Chapter 2

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

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 *Introduction to QAD Enterprise Applications User Guide*. This section describes user interface features specific to QAD BPM.

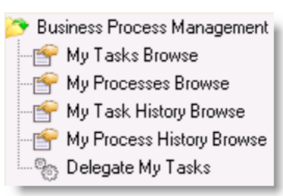
You can access QAD BPM functions by using either the Menu Search field or the menu tree in the Applications pane in the QAD .NET UI. After QAD BPM is installed, the functions are grouped under Business Process Management by default.

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.

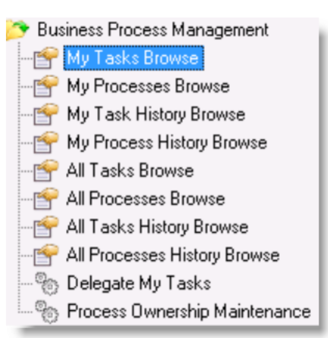
Note My Tasks Browse shows only the tasks that are associated with the current domain. My Processes Browse shows only the processes that associated with the current domain. To see tasks and processes associated with different domains, switch workspaces in .NET UI.

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.

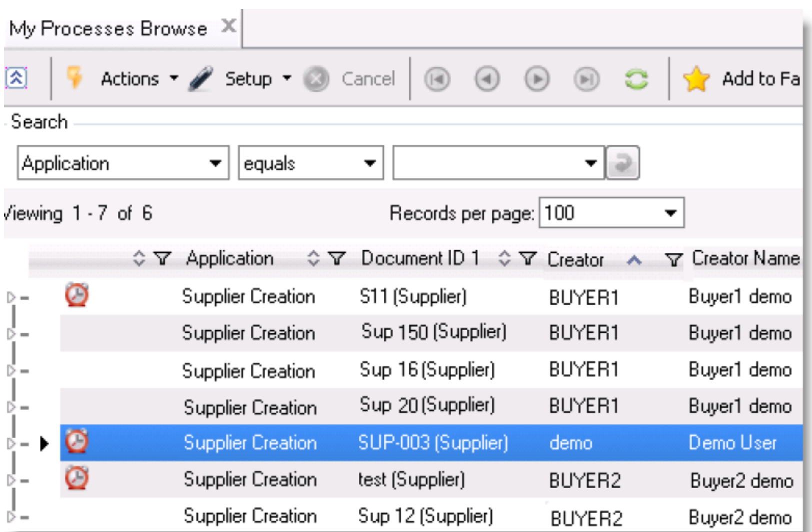
Role-Based Process Ownership and Visibility

One key benefit of the QAD BPM solution is the increased level of visibility for 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.

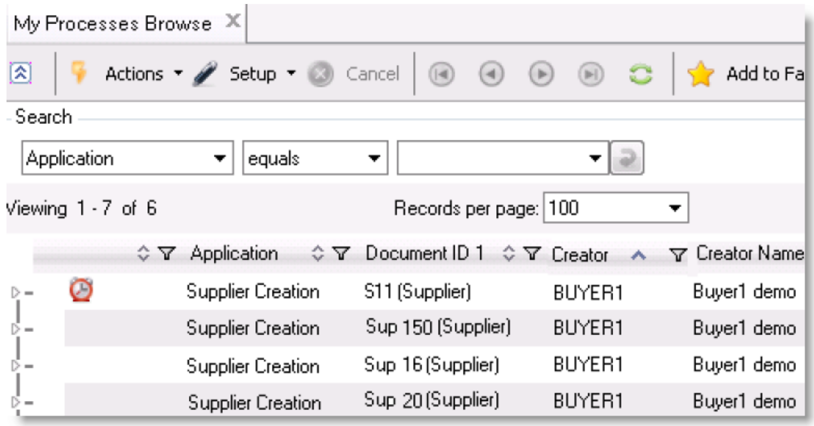
- For you, in your Processes Browse, you can manage all suppliers created by any employee in your organization. To identify which Supplier Creation process instance is created by which employee in your organization, you can look at the Creator field.

Fig. 2.3
For Purchasing Manager



- For buyers, in their Processes Browses, they can manage the suppliers that they have created.

Fig. 2.4
For Buyer



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 38.

Understanding Business Process Structure

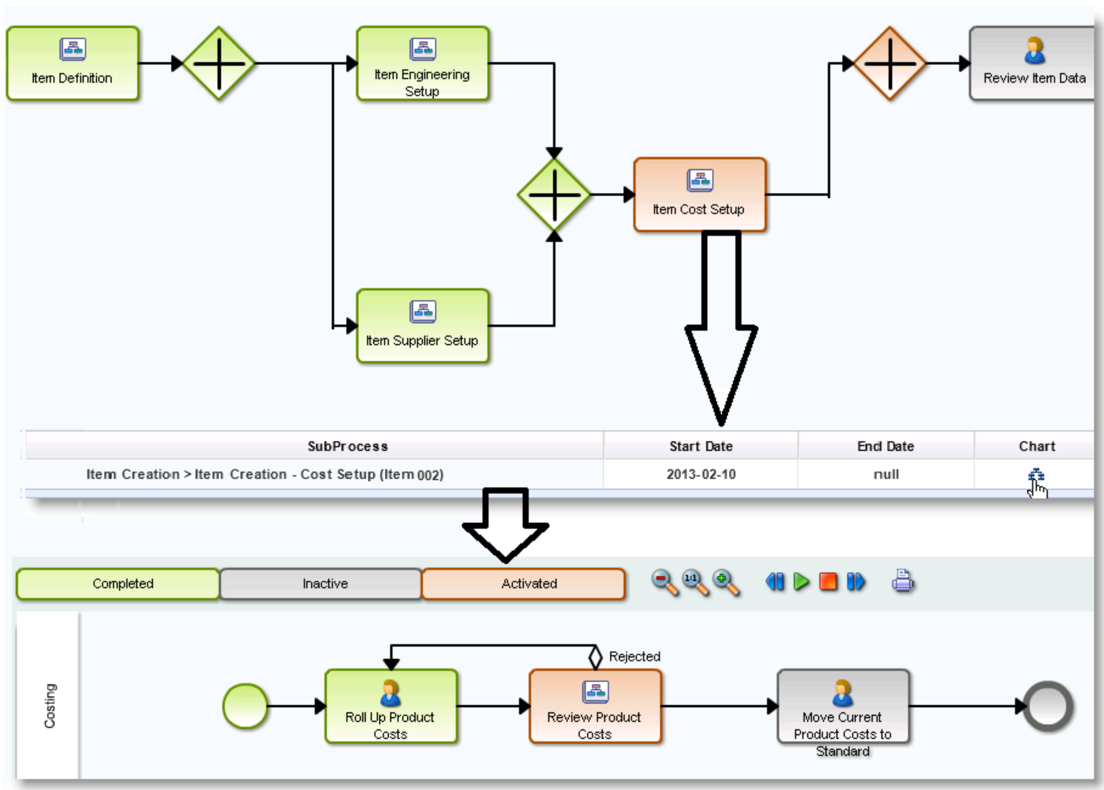
A business process involves multiple work steps in the form of operations, interactions, and notifications.

- 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
Hierarchy of Subprocesses



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

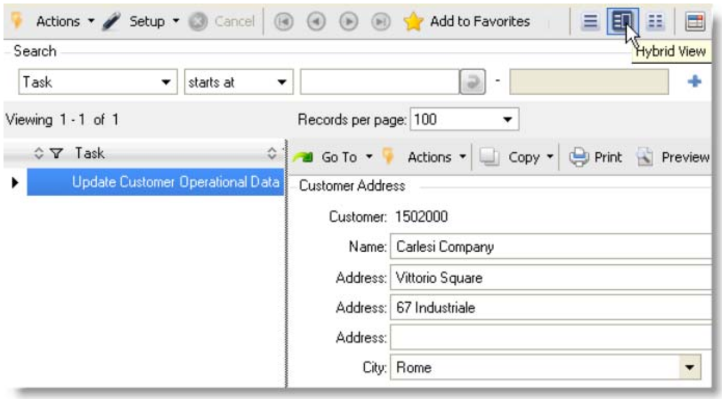
Note QAD provides a standard template for the approval process, as the approval process can be used as a subprocess in many business processes, such as the Item Cost Setup process. For more information about the approval subprocess, see "Completing Tasks in the Approval Subprocess" on page 17.

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.

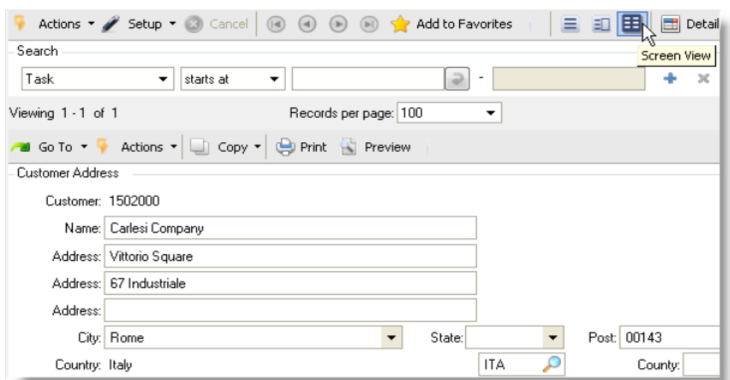
- Hybrid View: By default, you can see both the browse screen and the launched application screen.

Fig. 2.6
Hybrid View



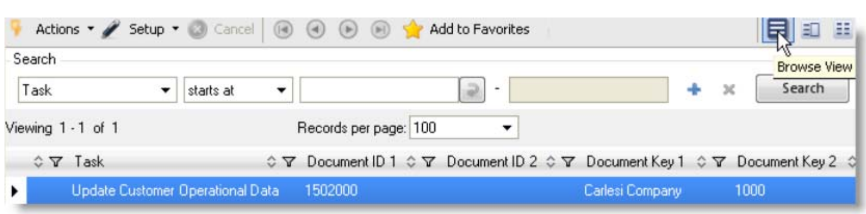
- Screen View: If you want to see the full launched screen, click the Screen View button in the application toolbar.

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.

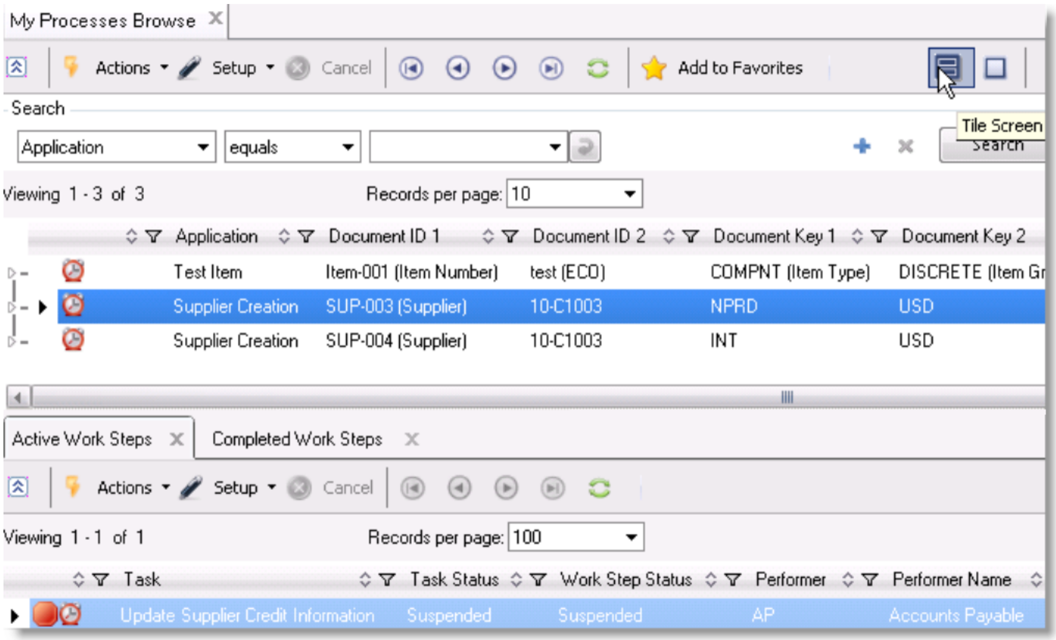
Fig. 2.8
Browse View



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

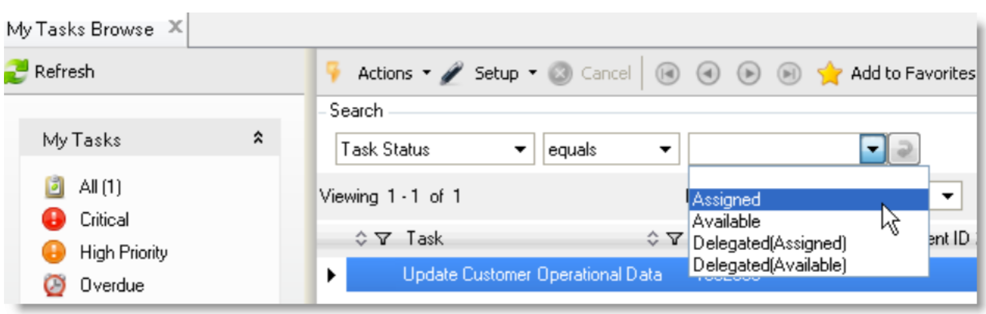


Using Tasks Browse

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 Status



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

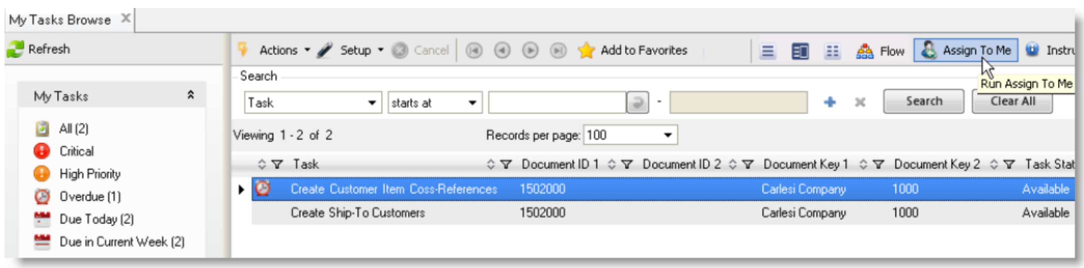
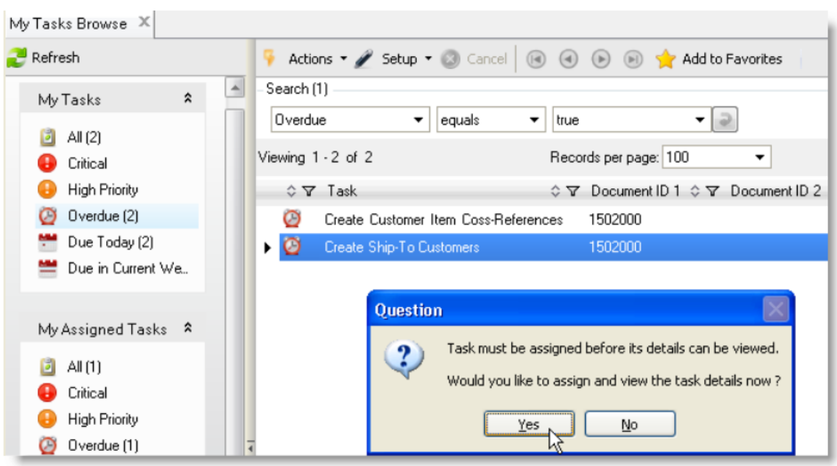
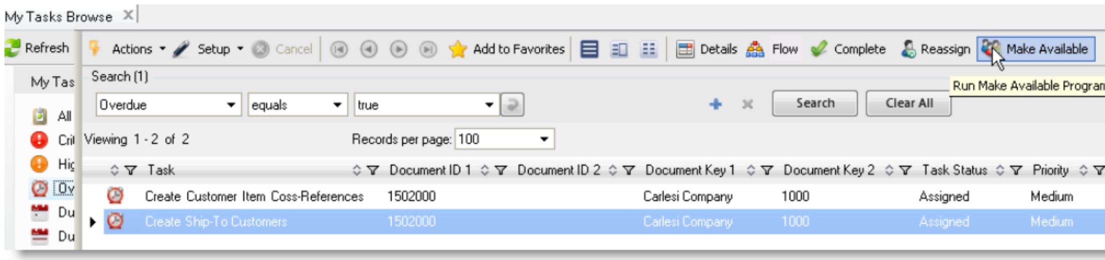


Fig. 2.12
Another Way of Assigning a Task to Yourself



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.

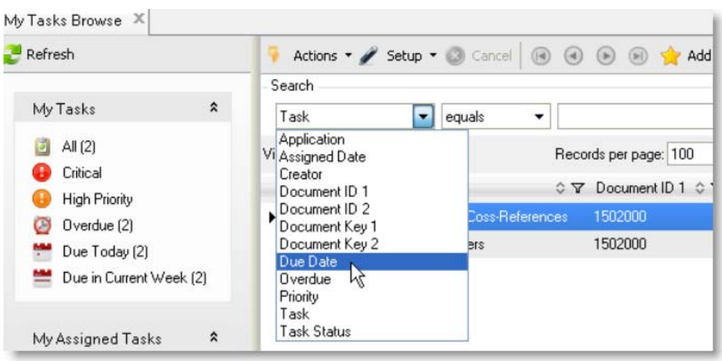
Fig. 2.13
Make Available



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 subidentifier for the process instance.

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

Document Key 2. A subattribute 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.

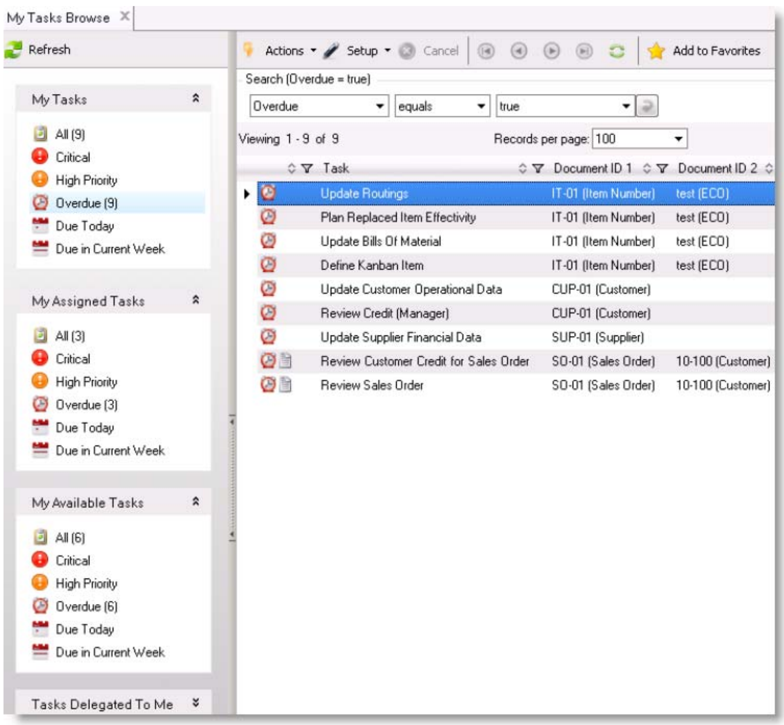
Task Status. Whether the task is mandatory or optional for you.

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
Predefined Filters

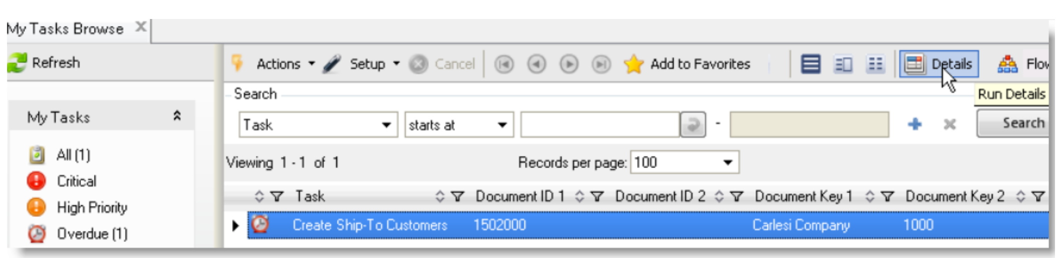


Performing a Task

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.

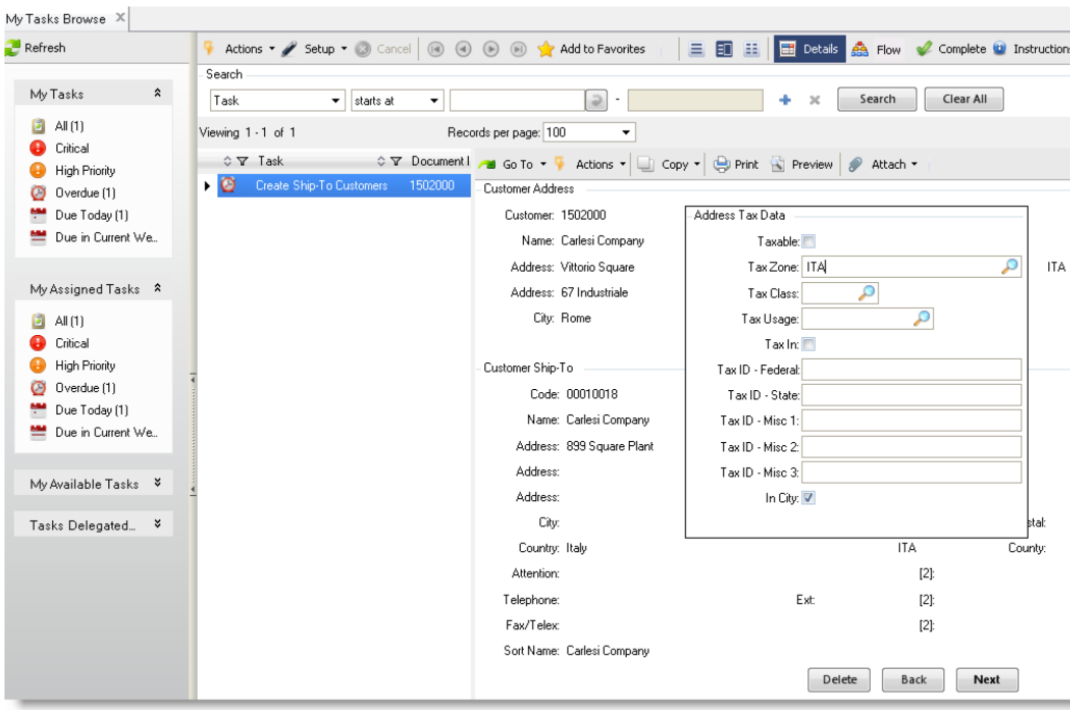
For example, in a customer creation process, you see in your task list a task of creating customer ship-to information.

Fig. 2.16
Task Details



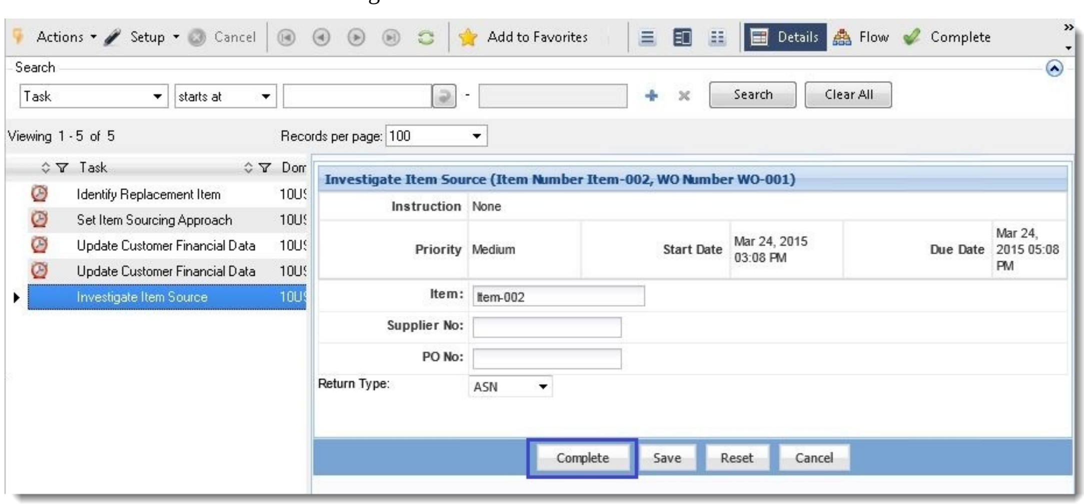
You double-click the task item or click the Details button and see the Customer Ship-To section for you to fill in. You fill in all the necessary information to create a ship-to for the customer, specifying the address, tax, contact details, and so on.

Fig. 2.17
Perform a Task



Note A task is not always a QAD EA function; it can also be a custom JSP page. For a custom JSP page, after you fill in the necessary information, make sure that you click the Complete button inside the JSP page. Otherwise, the data you enter cannot be saved.

Fig. 2.18
Perform a Task from a Custom JSP Page



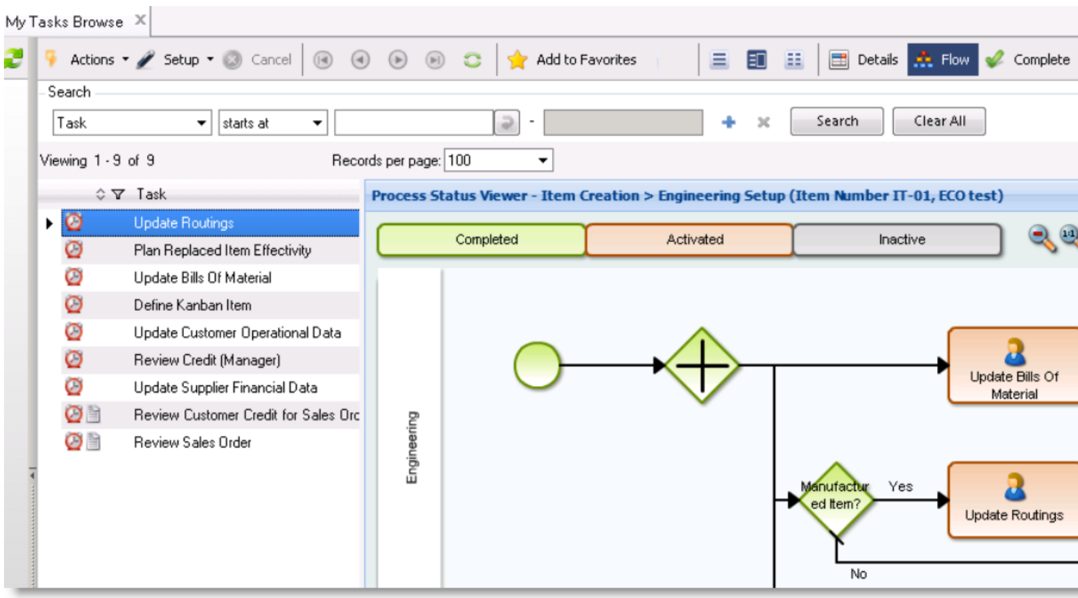
QAD

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.

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

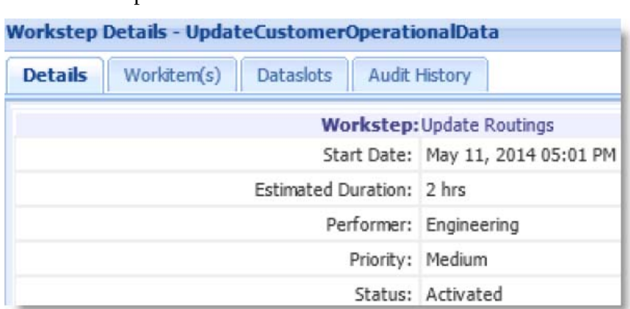
Example Your task is to create the customer ship-to address; it is one work step in the business process of creating a customer. When you click Flow to view the whole process, you can get a better understanding of your task context, such as who performs what tasks in the process.

Fig. 2.19
View Task Context



In the Flow view, you can also double-click each work step of the business process to view their details.

Fig. 2.20
View Workstep Details

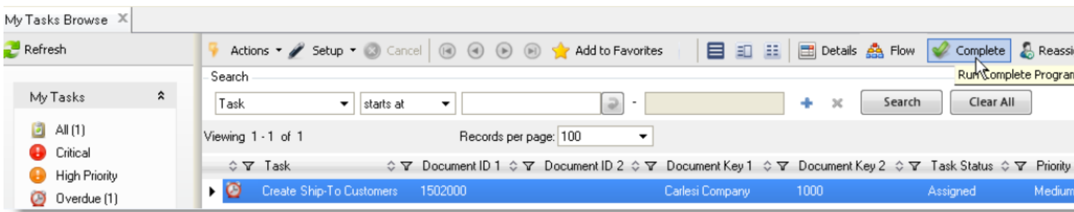


Completing Tasks

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

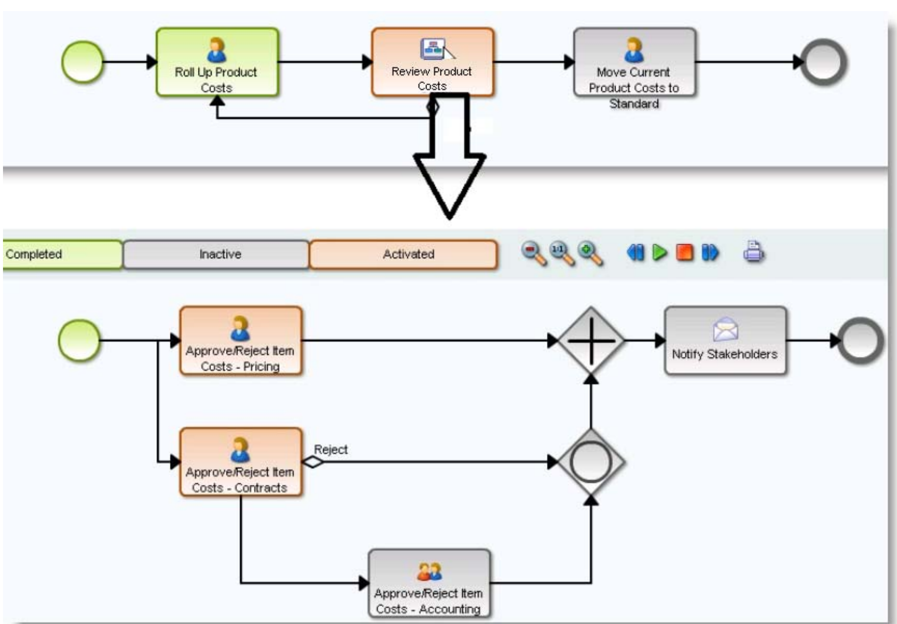


The completed task is removed from your active task list to the History Browse. All your completed tasks are displayed in My Task History Browse.

Completing Tasks in the Approval Subprocess

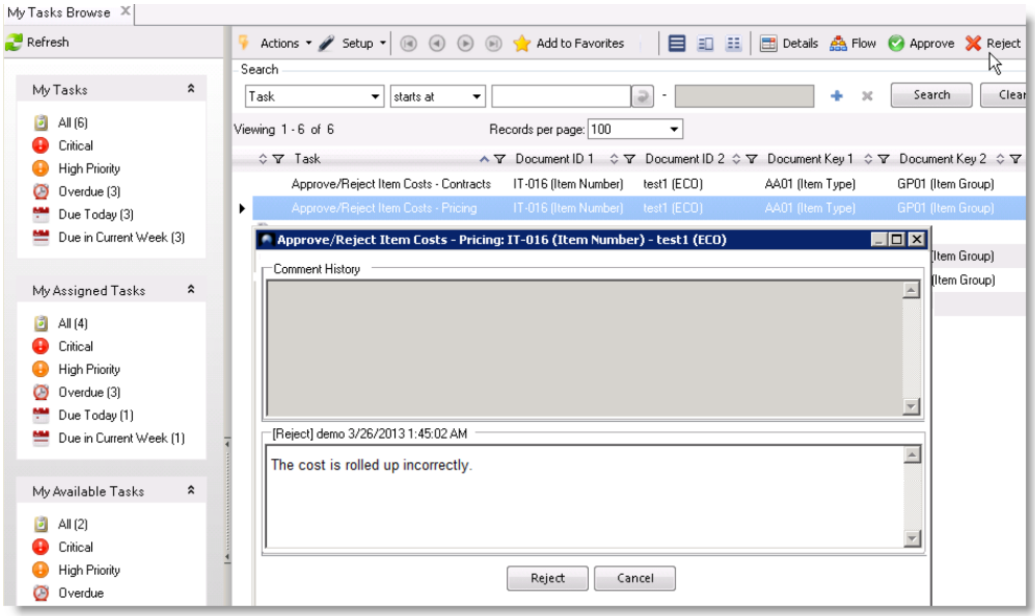
As review and approval of a business document is a common practice in an organization, QAD provides a standard template for the approval process. The approval process can then be used as a subprocess in business processes. Figure 2.22 shows an example of a Cost Approval subprocess being used in the Item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

Fig. 2.22
Approval Subprocess



In the approval subprocess (as shown at the lower part of Figure 2.22), you can see some approval work steps. Different from completing normal tasks by clicking the Complete button in the application toolbar, completing the approval work step is by clicking the Approve or Reject button.

Fig. 2.23
Approve/Reject



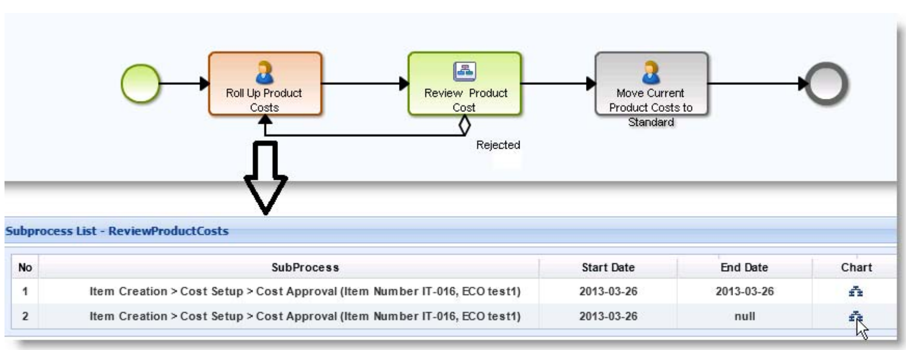
Note If you click the Reject button to reject approval, make sure that you provide reasons for the rejection.

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 e-mail to the stakeholders.

Note Business process developers can define the stakeholder list.

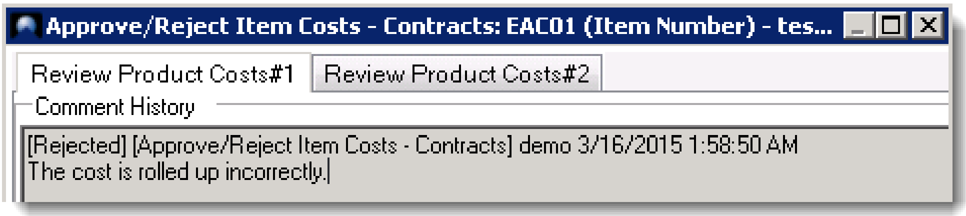
Example In the Item Cost Setup process, when the Cost Approval subprocess is shown as rejected, the previous work step—Roll Up Product Costs—is activated again. After the product costs are rolled up again, the Cost Approval subprocess starts a new cycle of approval.

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.

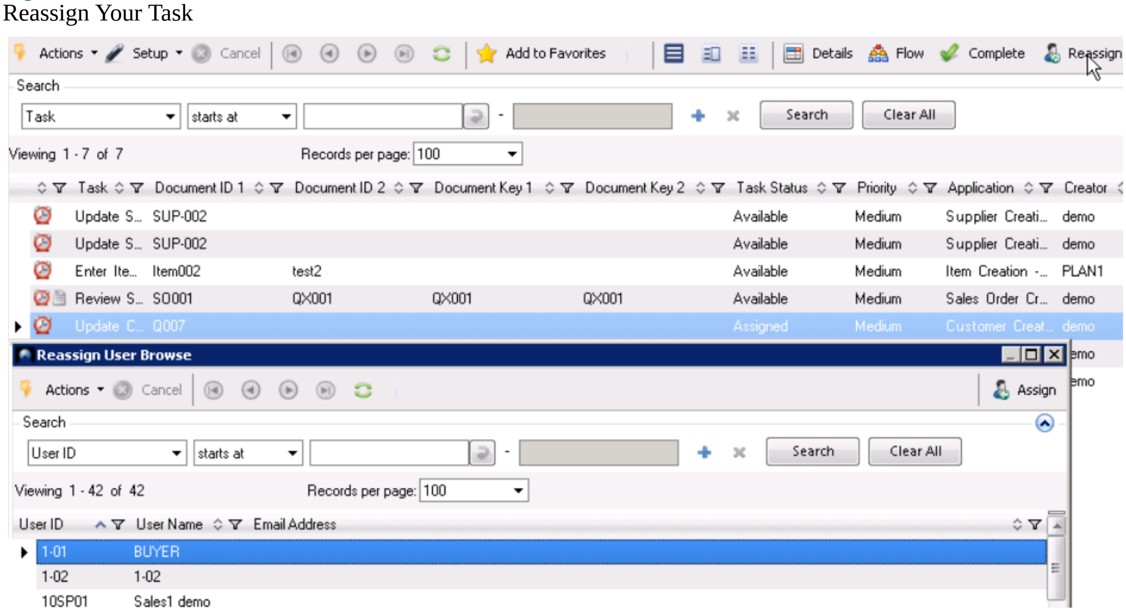
2 Click the Reassign button in the application toolbar.

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



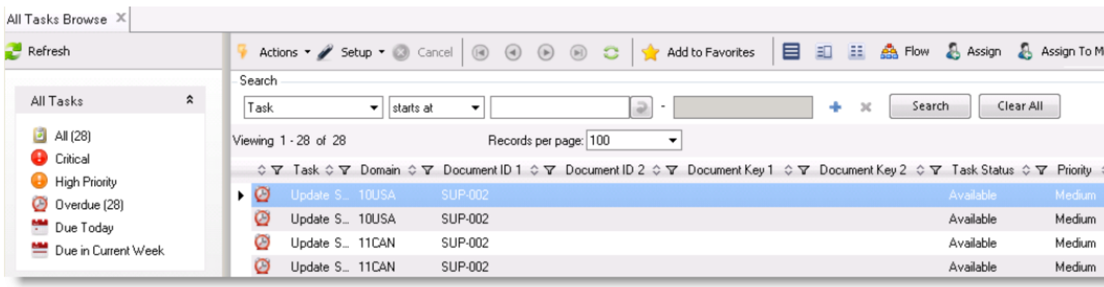
After you reassign the task, the task is removed from your task list and added to the assigned user's task list.

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:

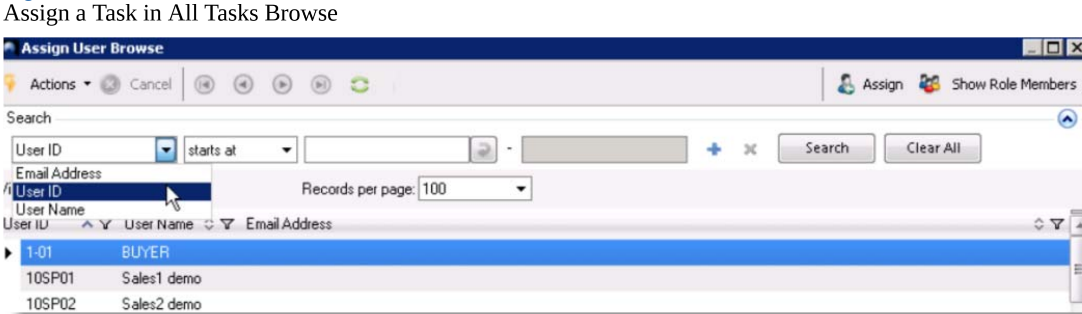
  a Click the Assign icon in the application toolbar.

  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 redelegated, but can be reassigned.

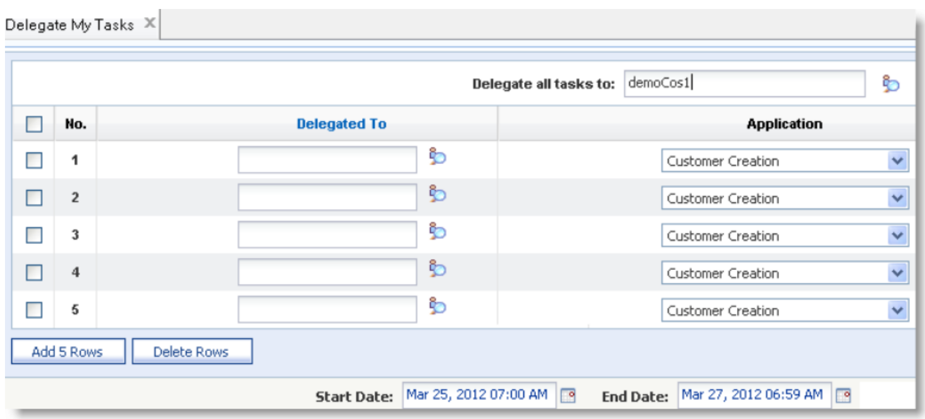
The function Delegate My Tasks provides two delegation options to you. The first option is to delegate all your assigned tasks to a single user. Alternatively, for each application, you can specify a user.

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.

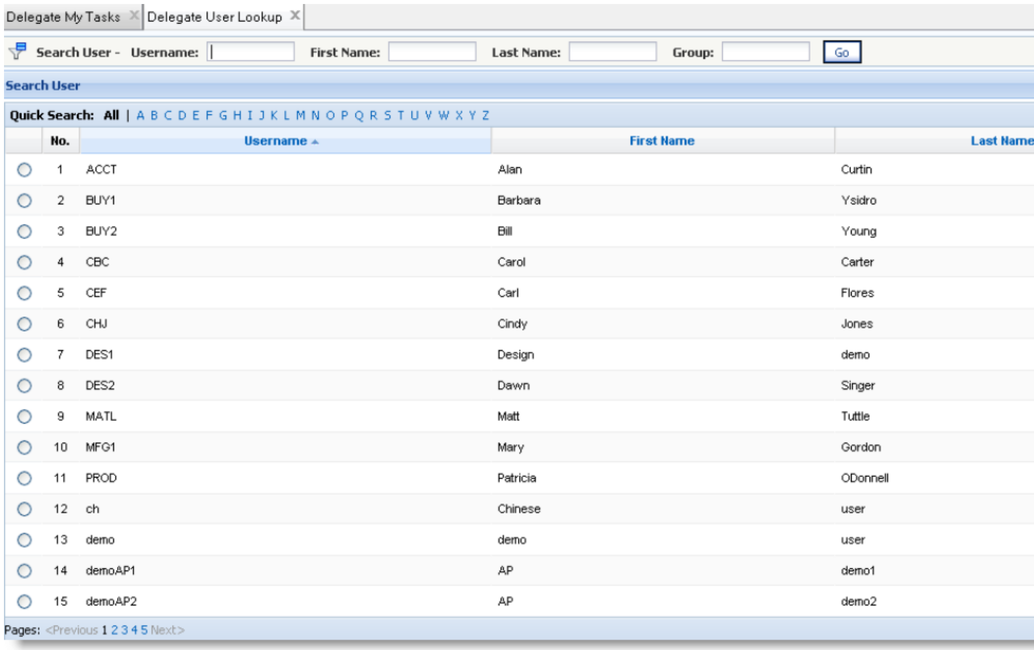
Fig. 2.29
Delegate all Tasks



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.

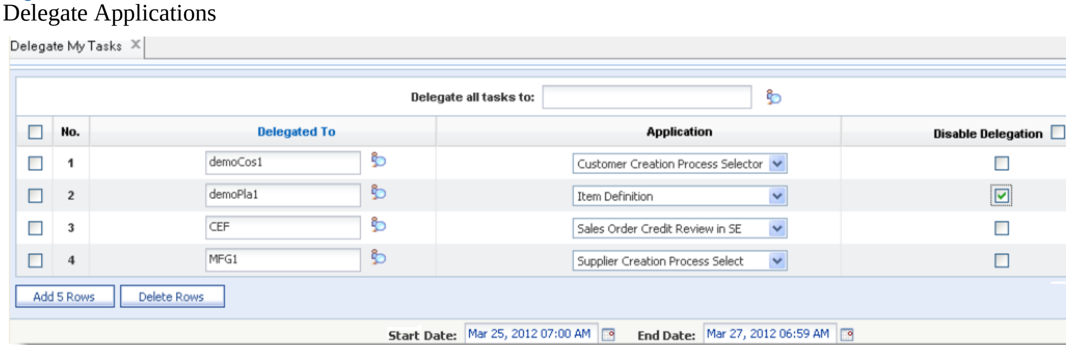
Note You can delegate only at the application level, and not at a specific task level. The system delegates all tasks in an application to the specified user.

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.

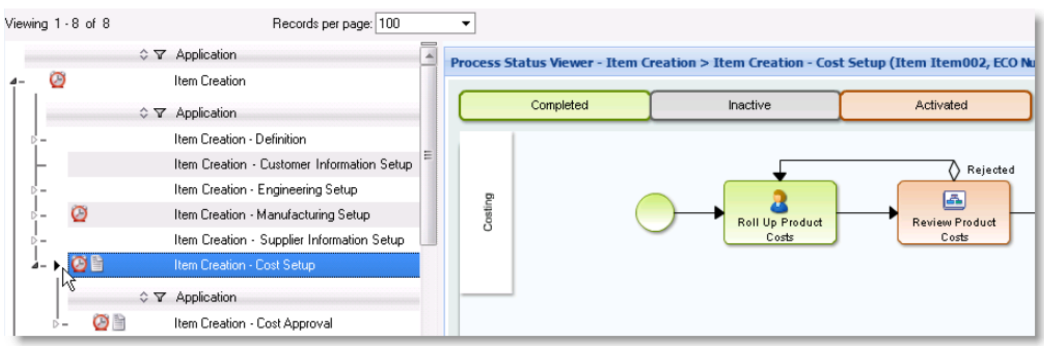
You can see values of document IDs and document keys, in brackets, in the process name display; the display of these values makes the process name display more meaningful.

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.

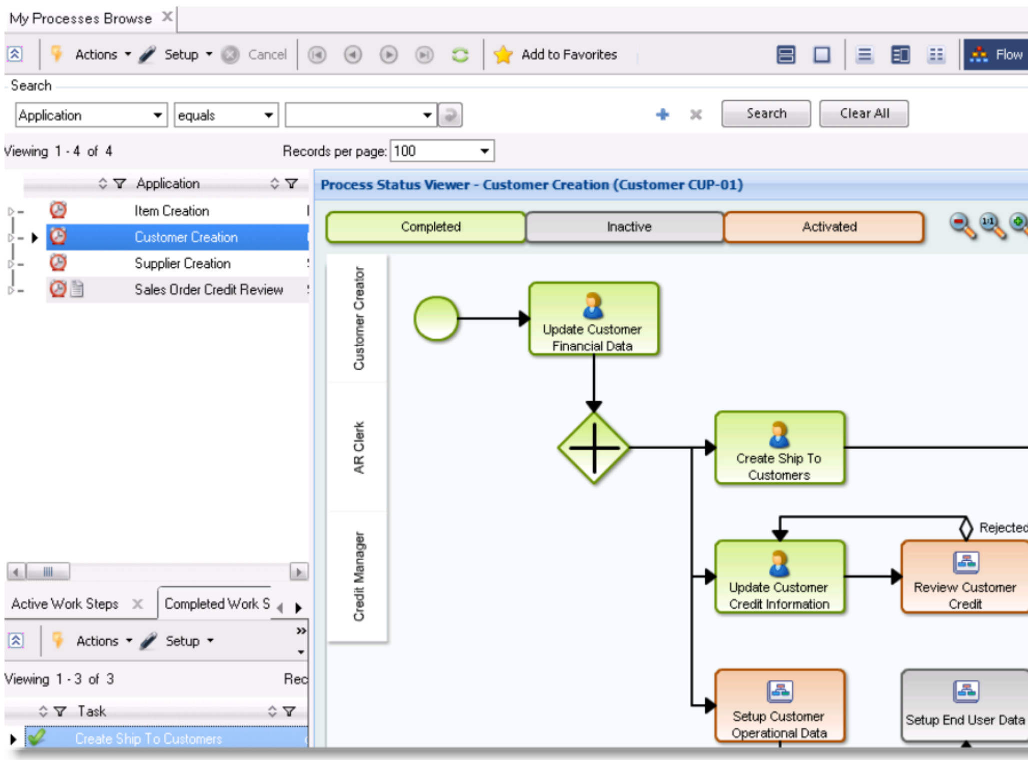
Flow View

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.

Note After you click the Flow button to view the process instance in a flowchart, you can click the button again to get back to the original browse view.

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 in the application toolbar, then you can see each work step displayed in a tabular format.

Note After you click the Tabular button to view the process instance in a tabular format, you can click the button again to get back to the original browse view.

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

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		

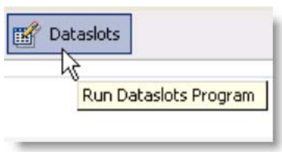
Different work step colors have different meanings:

- 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

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

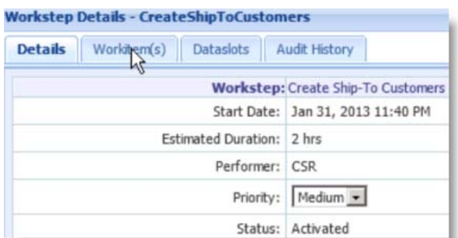
To update a work step in the Flow view:

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.

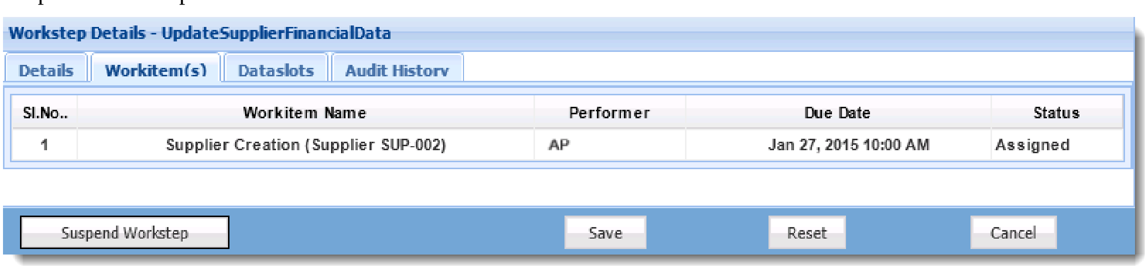
Fig. 2.38
Update Work Step in Flow View



- You can also suspend or resume a work step.

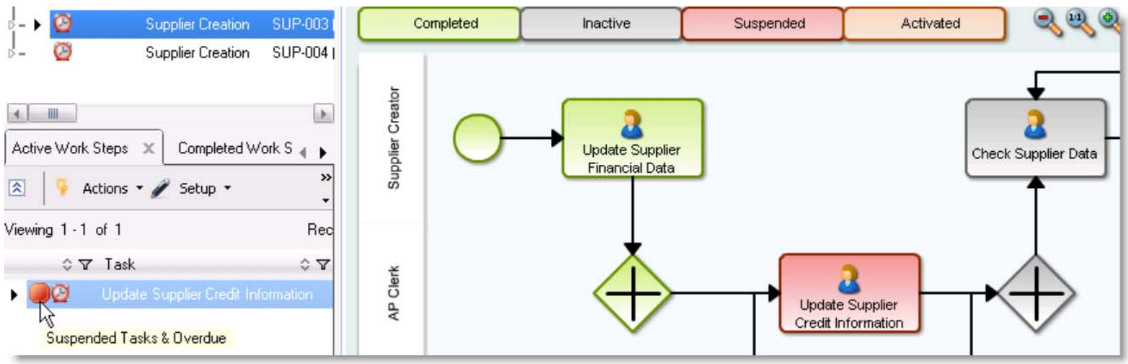
Example If you want to suspend a work step, you click Suspend Workstep. This action changes the work step color to red. The system temporarily stops the process at the suspended work step.

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.

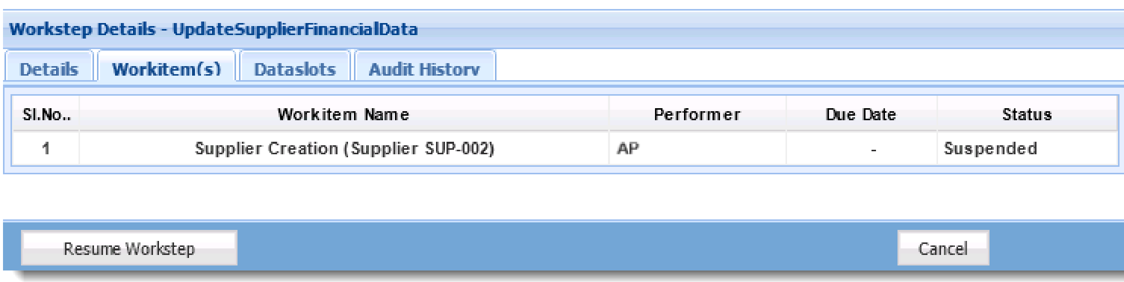
Fig. 2.40
Suspended Task



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



Sl.No..	Workitem Name	Performer	Due Date	Status
1	Supplier Creation (Supplier SUP-002)	AP	-	Suspended

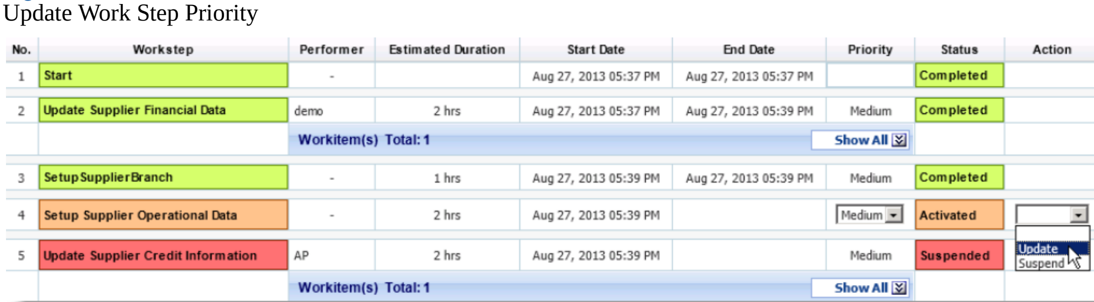
To view how a work step has been updated, click Audit History.

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



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	SetupSupplierBranch	-	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

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	SetupSupplierBranch	-	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		

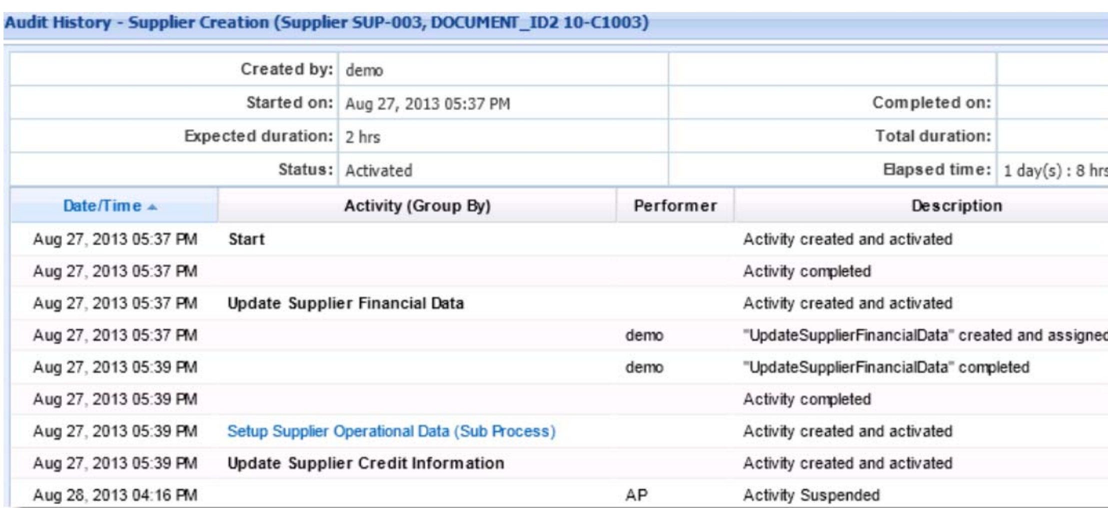
Viewing Audit Trail

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.

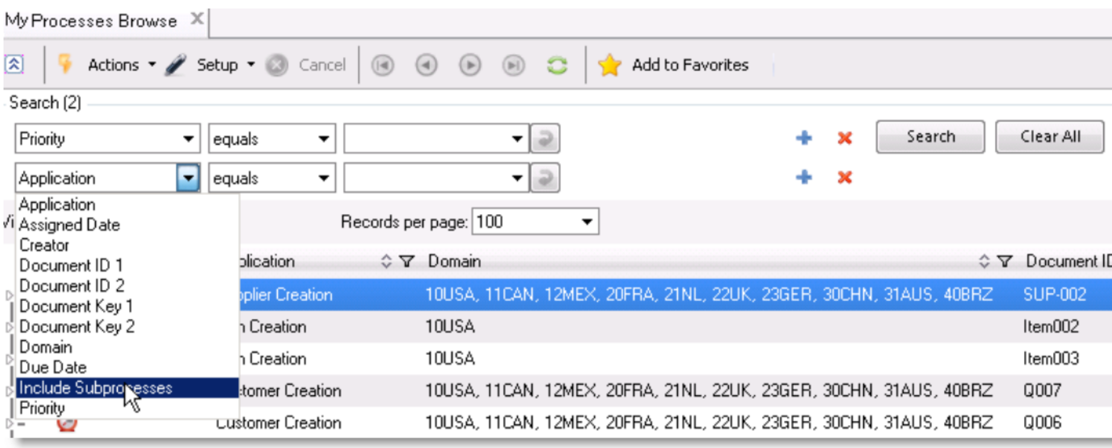
Searching Process Instances

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



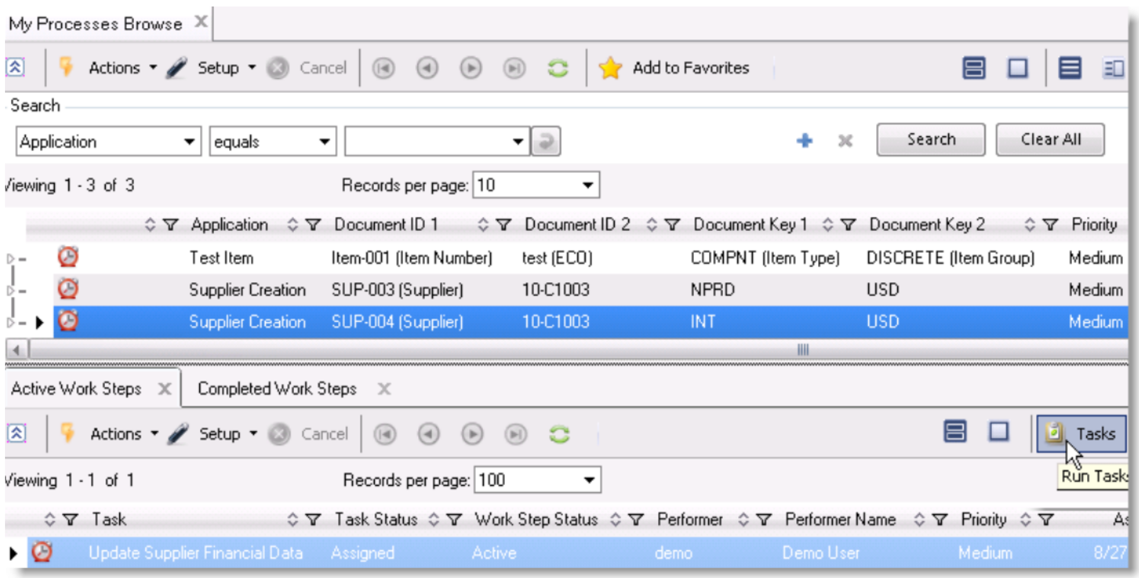
Bringing up Tasks Browse from Processes Browse

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.

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.

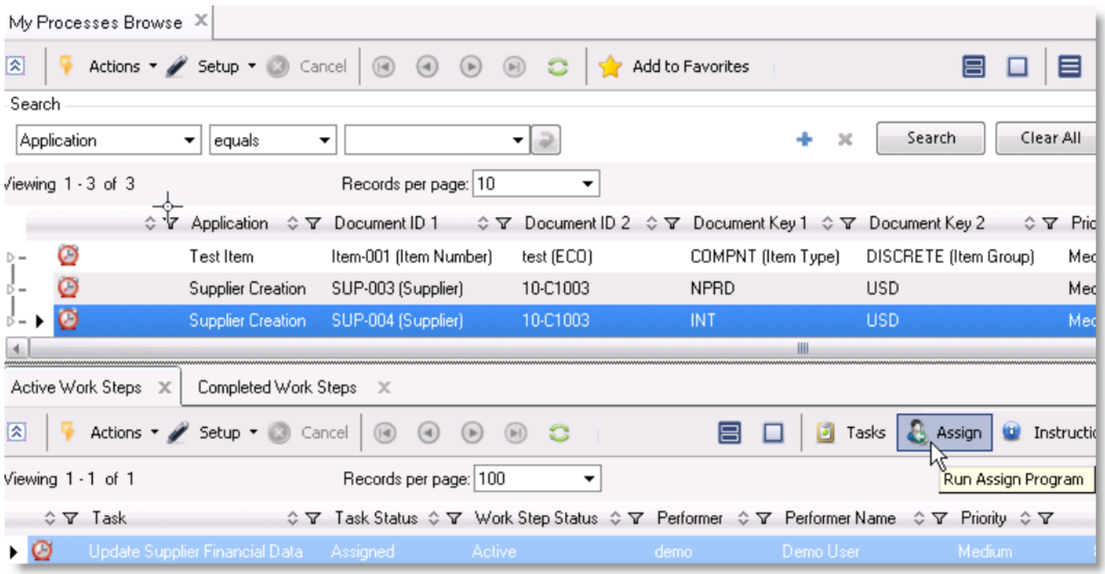
Fig. 2.46
Bring up Tasks Browse from Processes Browse



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.

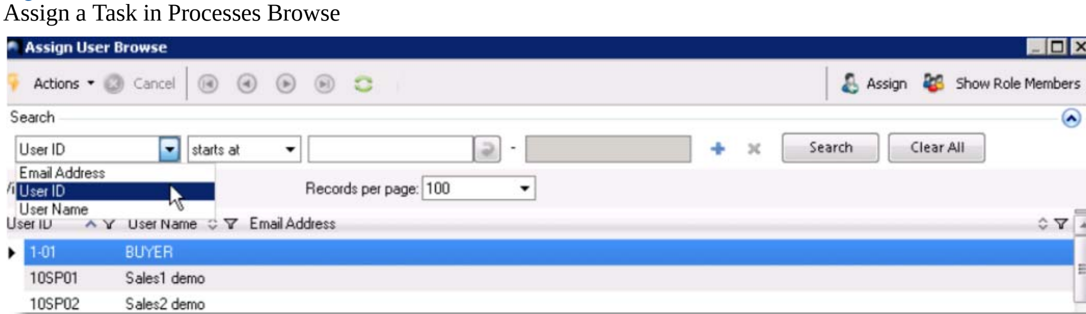
Fig. 2.47
Assign Tasks from Processes Browse



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 23 and “Viewing Audit Trail” on page 29.

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 29.

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 Browses are for you to view the completed tasks and process instances:

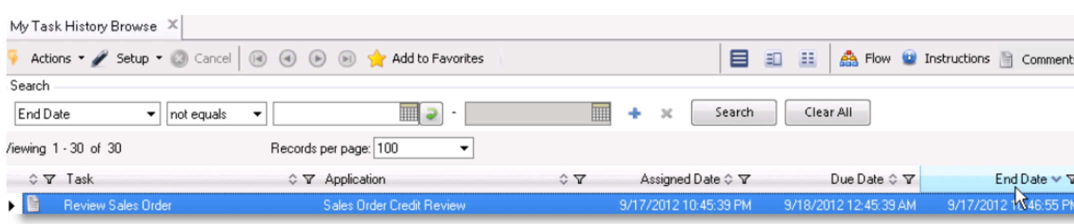
- View all your completed tasks in My Task History Browse.
- View all completed processes that were previously in My Process Browse.

If you are an administrator (the *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



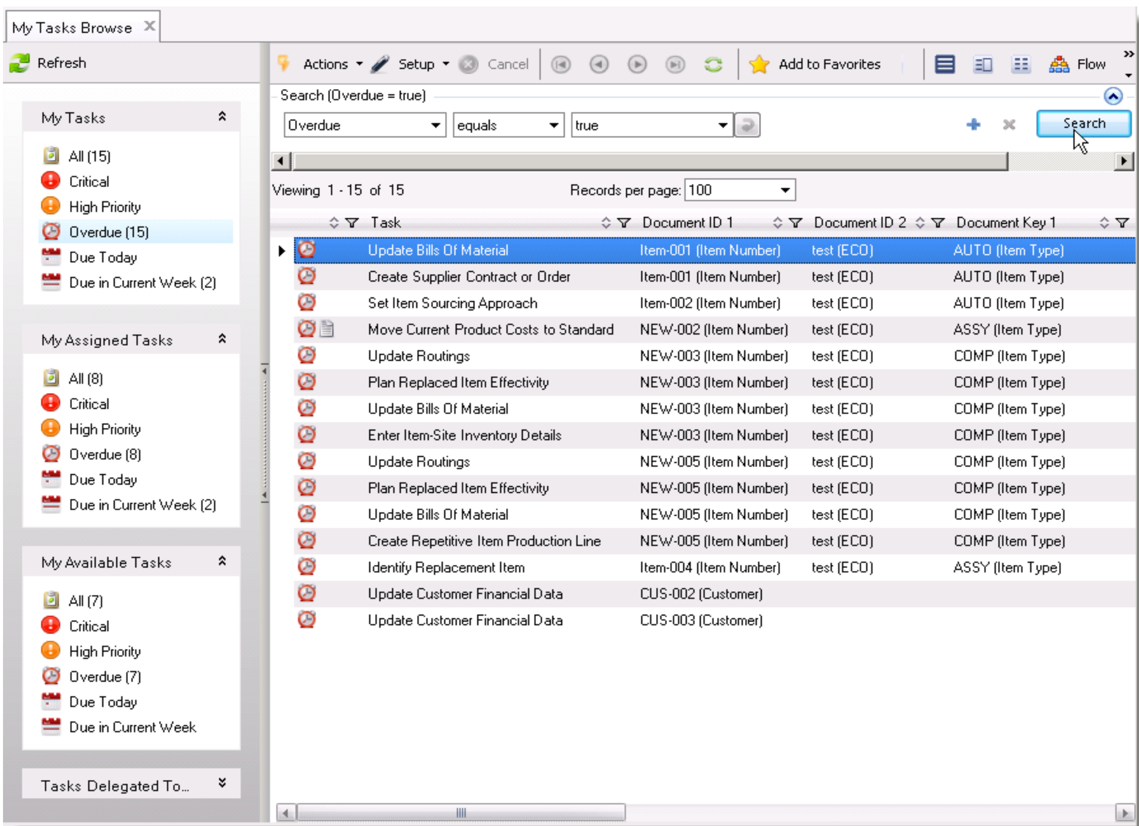
Refreshing Browse Views

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.

In this situation, click the Search button in the Search panel to refresh tasks listed in the browse results.

Note Clicking the Refresh button in the predefined filter panel refreshes the predefined filter panel only.

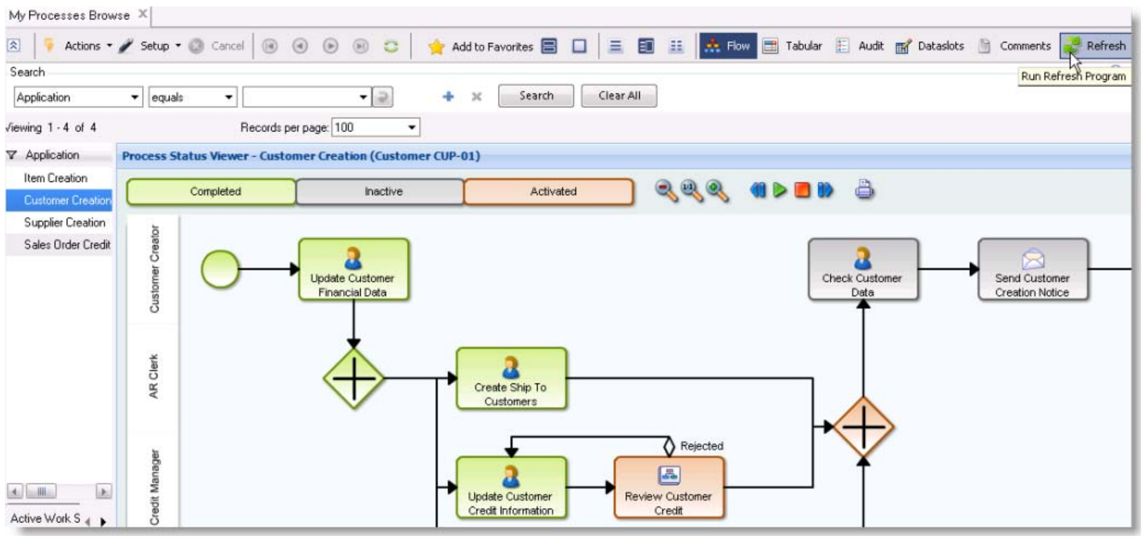
Fig. 2.50
Refresh Tasks Browse



Using the Refresh button in the Processes Browse, however, lets you 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 a role who owns the process, 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:

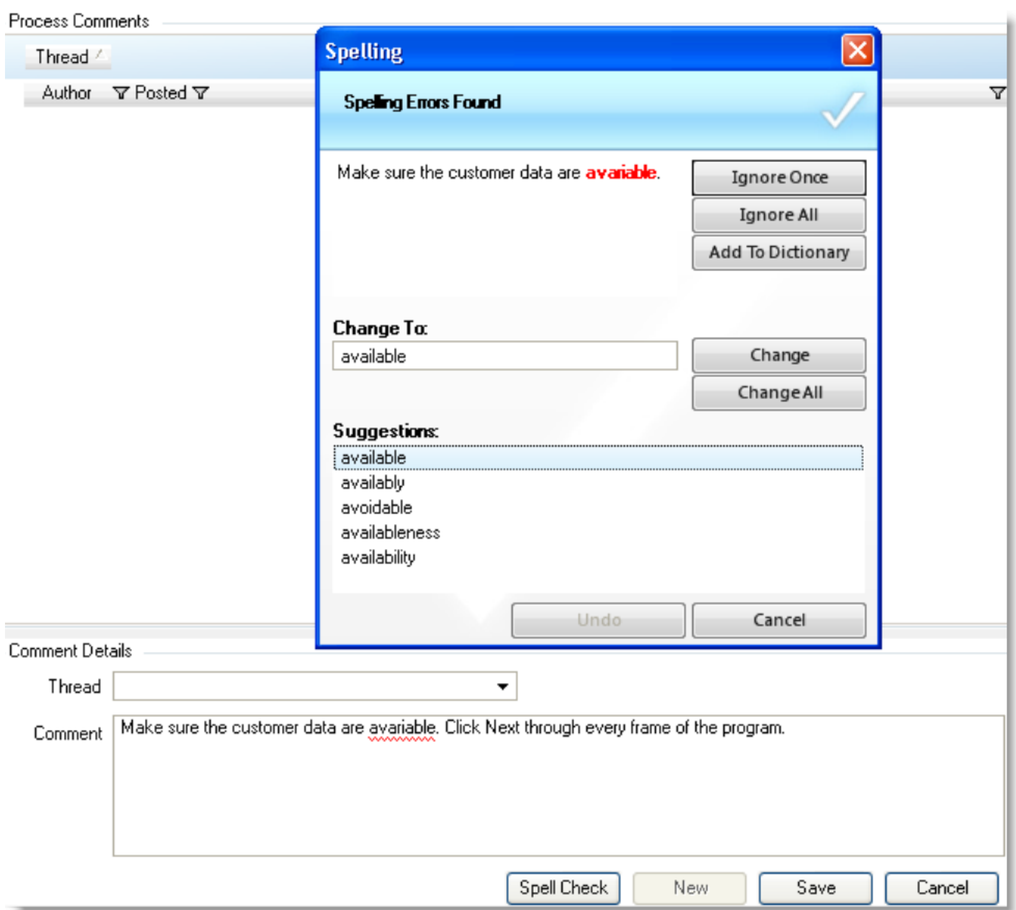
1. Select a task or a process instance.

   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.

Fig. 2.52
Add Comments



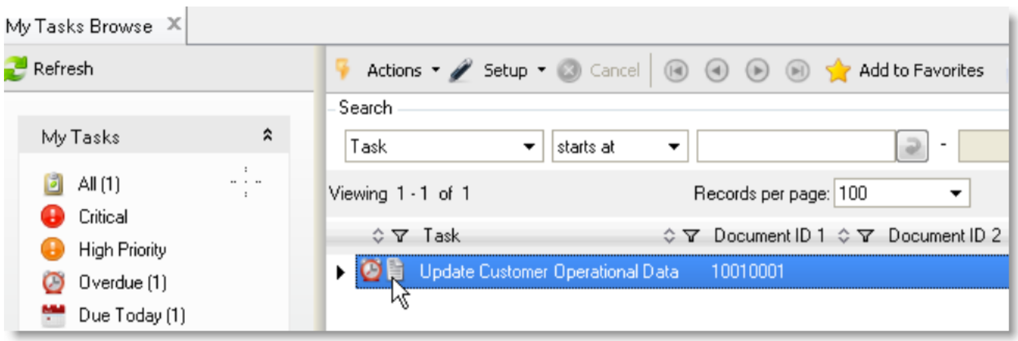
Note In the text box, red wavy lines under words indicate spelling mistakes. You can click the Spell Check button to see correction suggestions.

4 Verify the comment and click Save.

Viewing Comments

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

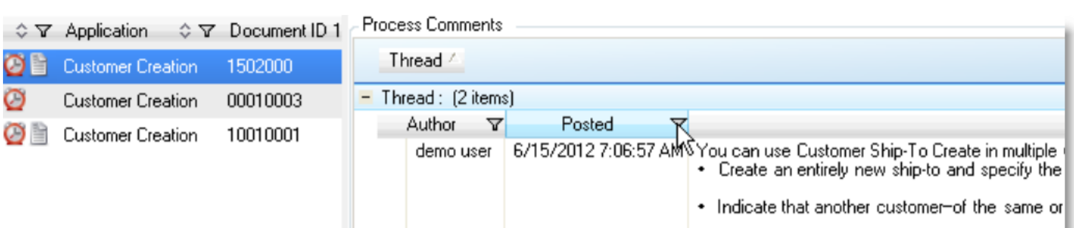
Fig. 2.53
View Comments



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



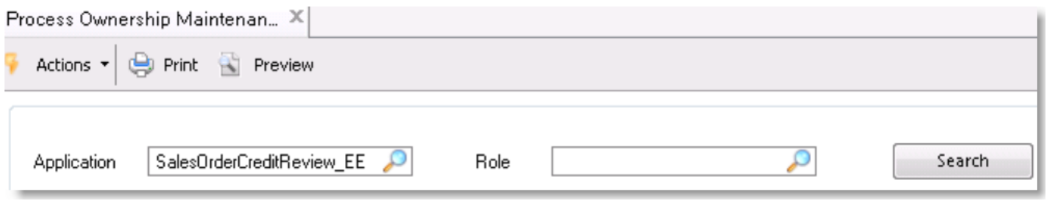
Maintaining Process Ownership (for Administrators)

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.

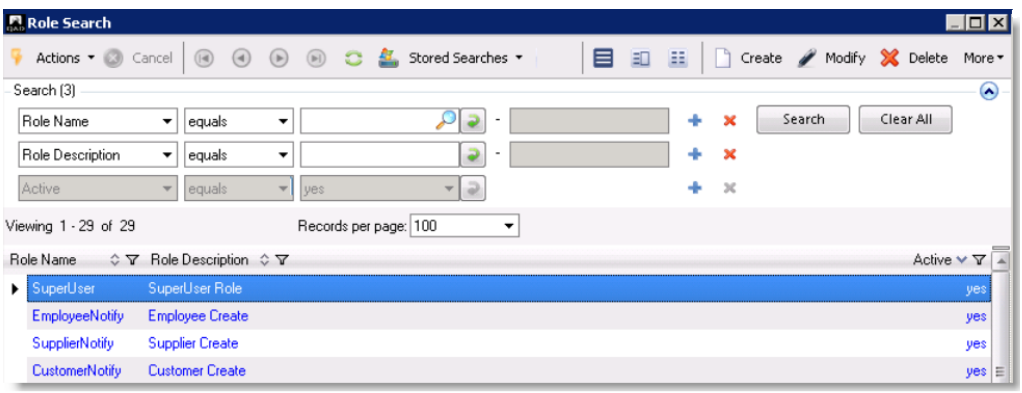
1 In the Application field, search for the Sales Order Credit Review process.

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.

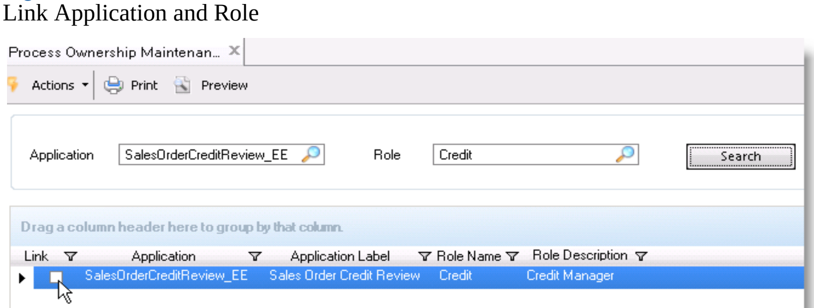
Fig. 2.56
Role Search



3 Click the Search button.

4 Select the Link check box and click Save.

Fig. 2.57
Link Application and Role



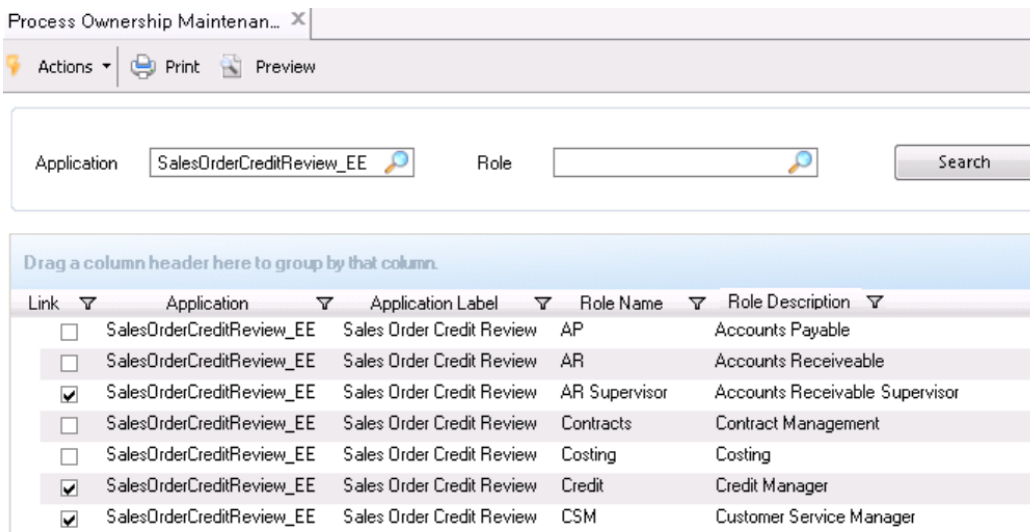
Note The process ownership definition can be exported to an Excel work sheet. Right-click the screen and select Export to Excel.

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

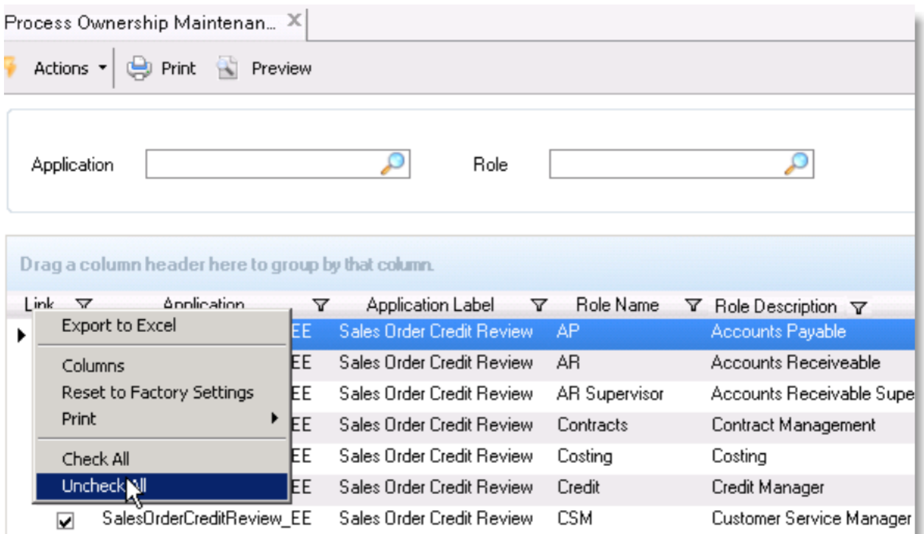


If you leave both the Application field and the Role field blank, the system displays all possible associations for you to select.

Note 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 Ownerships



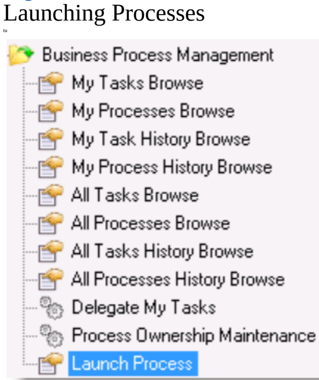
Launching Processes from Custom Forms (for Authorized User)

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.

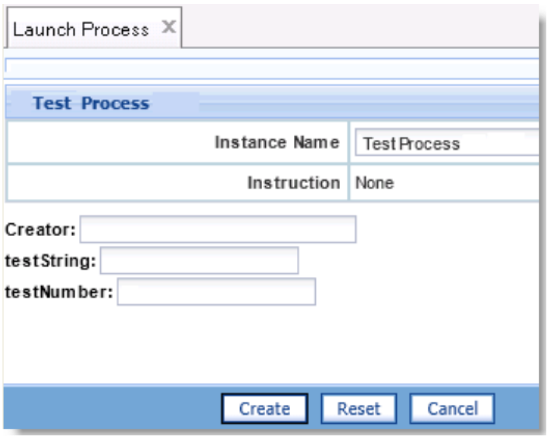
Fig. 2.60
Launching Processes



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

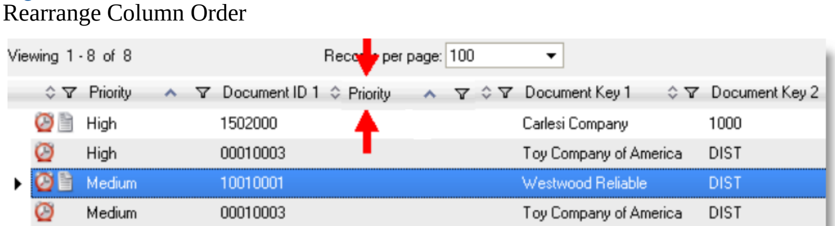
You can customize your user interface to make it more convenient for you.

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.

Fig. 2.62
Rearrange Column Order

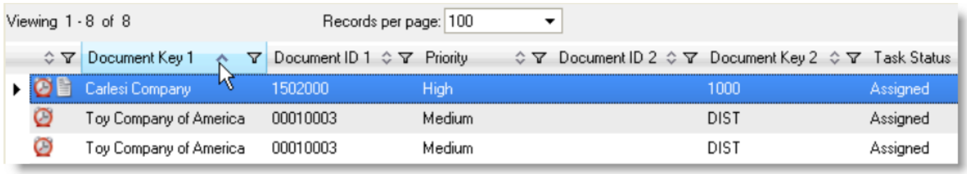


Sorting a Column

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

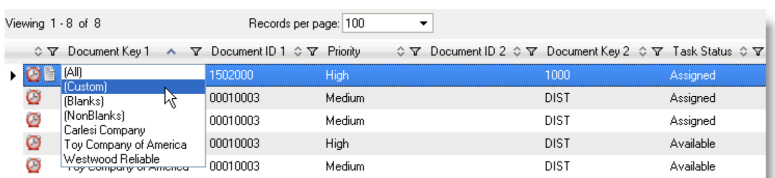


Filtering a Column

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



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).

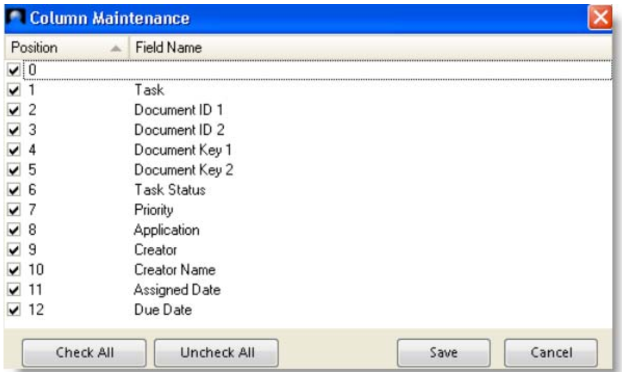
Maintaining Columns

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



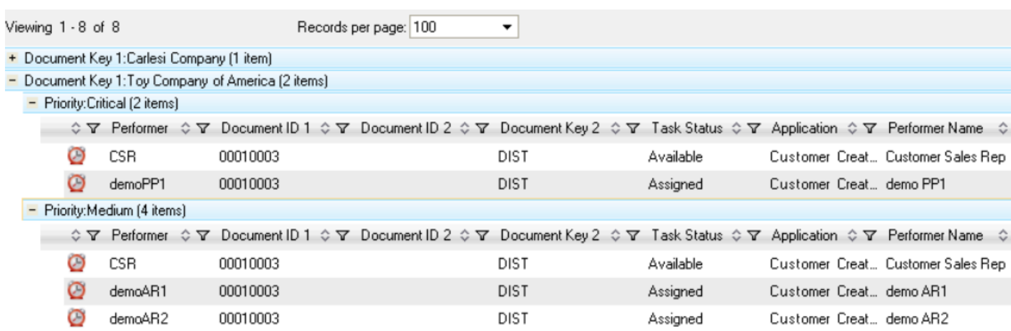
Grouping Records

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



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

Adding Browses 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

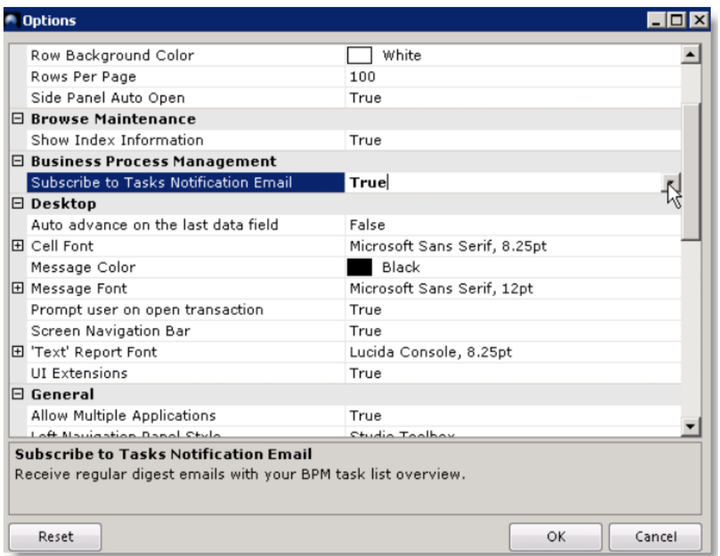
You can get e-mail notifying that you have BPM tasks to do, when all the following setup tasks have been completed:

- 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.

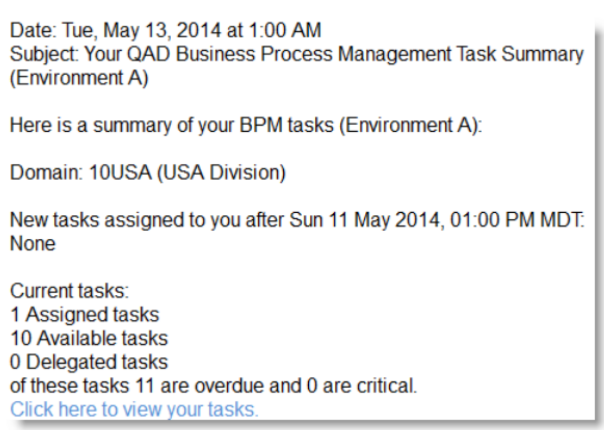
- Your e-mail address has been specified in QAD EA.
- You have subscribed to BPM Tasks Notification. To subscribe BPM Tasks Notification, go to Tools|Options in QAD EA and select True for the Subscribe to Tasks Notification Email option. By default, the option has already been True if your e-mail address is specified in QAD EA.

Fig. 2.67
Subscribe to Tasks Notification



The tasks notification e-mail gives you a summary of your BPM tasks. To view your task details and perform your tasks, you can click the link in the e-mail to go to the Tasks Browse in QAD BPM.

Fig. 2.68
Tasks Notification E-mail


Date: Tue, May 13, 2014 at 1:00 AM
Subject: Your QAD Business Process Management Task Summary (Environment A)

Here is a summary of your BPM tasks (Environment A):

Domain: 10USA (USA Division)

New tasks assigned to you after Sun 11 May 2014, 01:00 PM MDT:
None

Current tasks:
1 Assigned tasks
10 Available tasks
0 Delegated tasks
of these tasks 11 are overdue and 0 are critical.
Click here to view your tasks.

Note The e-mail, in the title and in the body, also displays the name of the environment where the task notification is created. In this way, when you are using multiple environments, you can identify the source environment of the tasks. The environment name is specified during the installation of QAD BPM.

Product Information Resources

QAD offers a number of online resources to help you get more information about using QAD products.

QAD Forums (community.qad.com)
Ask questions and share information with other members of the user community, including QAD experts.

QAD Knowledgebase (knowledgebase.qad.com)*
Search for answers, tips, or solutions related to any QAD product or topic.

QAD Document Library (www.qad.com/documentlibrary)
Get browser-based access to user guides, release notes, training guides, and so on; use powerful search features to find the document you want, then read online, or download and print PDF.

QAD Learning Center (learning.qad.com)*
Visit QAD's one-stop destination for all courses and training materials.

*Log-in required

Index