

Adeptia Suite 5.0 Business User Guide

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Document Conventions

Convention	Description
Text Matter in font Verdana and font size 9 point.	Explains the installation guide.
<u>Text matter</u>	Click on link to reach target.
0	Note:

Abbreviations Used

Abbreviation	Description
WebDAV	Web-based Distributed Authoring and Versioning



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For latest updates and information, please visit us at www.adeptia.com .



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1 ABOUT THIS GUIDE

This document covers a detailed description of all features of Adeptia Suite that are available to a business user. It acts as a guideline to use these features seamlessly and perform them in a business environment using Adeptia Suite.



These features are available to all users of Adeptia Suite.

Additionally, a business user also has access to the Process Modeling and Simulation feature of Adeptia Suite. For details, refer to the Process Modeling and Simulation Guide.

This document is divided into the following sections:

- My Tasks
 - Task Manager
 - Task History
- My Documents
 - Document Manager
- My Solutions
 - Using My Solutions
- My Monitor
 - Monitoring Solutions
 - Monitoring User Performance
 - Viewing Usage Report
 - Viewing Process Flow Report
- History
 - Viewing Adeptia Server Logs
 - Viewing Audit Trail Log
 - Viewing Event Log
 - Viewing System Log
 - Viewing Process Flow Log



2 TARGET AUDIENCE

Even though all these features are available to all users, they are primarily performed by a business user. Thus, this document is intended for business users. They can use these details to seamlessly perform all functions of Adeptia Suite.



MY TASKS



3 TASK MANAGER

You can view and manage all tasks assigned to you. If you are a manager then you can view and manage all tasks assigned to your staff (all users for whom you are the manager).

In the Adeptia Suite this feature is available in:

BPM Suite	Workflow Suite	Integration Suite	ETL Suite
\checkmark	\checkmark	\checkmark	V

This chapter describes the following tasks:

- Opening Task Manager
- Opening a Task
- Attaching Files to a Task
- Viewing Files Attached to a Task
- Entering Comments for a Task

OPENING TASK MANAGER

By default, the Adeptia Homepage workspace area is displayed as a tabbed layout. It has three tabs:

- Task Manager
- Staffs Task Manager (appears only when you are a Manager)
- Task History

It is displayed with the *Task Manager* tab as selected.

Steps to open Task Manager

- By default, the Adeptia Homepage displays the Task Manager screen. Alternately, in the Adeptia Suite homepage menu, click [+] My Tasks to expand the tree. All the items in the My Tasks category are displayed.
- 2. Click Task Manager. The Task Manager screen is displayed (see Figure 3.1).





Figure 3.1: Task Manager

3. This screen displays tasks as organized based on the date when they are due. The information includes the task name, task subject, action, priority, expiry date and comments.

The tasks are organized as:

- Over Due: contains a list of tasks for which due dates have already passed.
- **Due Today:** contains a list of tasks which are due for today.
- **Due This Week:** contains a list of tasks, which are due for the next six days. Tasks that are listed in the *Due Today* list are not listed in this list.
- Due Later: contains a list of tasks for which due dates are more than seven days.

The tasks are organized in the Task Manager screen as displayed (see Figure 3.2).

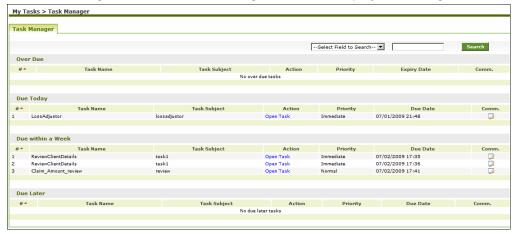


Figure 3.2: Task Manager (with Tasks)

Staffs Task Manager

This tab displays tasks as organized based on the date when they are due. The information includes the task name, task subject, assign to, priority, expiry date, due date, action and comments (see Figure 3.3).



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The tasks are organized as:

- Over Due: contains a list of tasks for which due dates have already passed.
- **Due Today:** contains a list of tasks, which are due for today.
- **Due This Week:** contains a list of tasks, which are due for the next six days. Tasks that are listed in the *Due Today* list are not listed in this list.
- **Due Later:** contains a list of tasks for which due dates are more than seven days.
- Staff Profile: Manager can view the calendar of the staffs for its availability. To view the dates at which user will not be available, click View link in the user's profile.

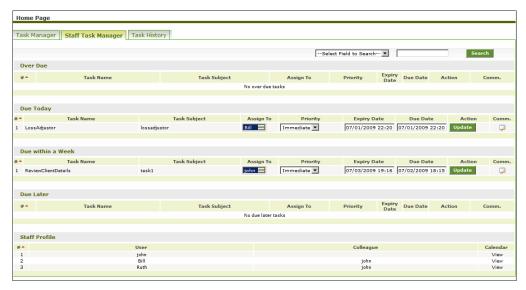


Figure 3.3: Staffs Task Manager

The Manager can change the *Assign To, Priority, Due Date, Expiry Date* and *comments* of the tasks assigned to its staff. Manager can re-assign the task to any other user or users from the staff. After changing tasks properties, click **Update** button to save the changes. Manager can enter/update comments by clicking the **Comments** icon.

When a manager reassigns the task from one user to another, an email is sent to existing user that the task has been removed from his/her task manager. Similarly an email is send to the new user that a task is added to his/her task manager.



For details on Task History tab, refer to the <u>Task History</u> section.



OPENING A TASK

Steps to open a Task

1. Click **Open Task** against the task that you want to open. The Task screen is displayed (see Figure 3.4).

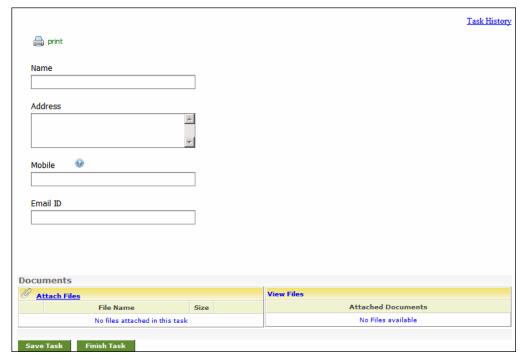


Figure 3.4: Task

2. This screen displays the activities associated with the selected task. Enter the details as required.

You can attach files to the task, view the files attached, save the changes to the task and view Task History from this screen.



Once you open a task, and another user opens the same task, it is displayed with a message that is the task is already opened by another user.

Attaching Files to a Task

Steps to attach files to a Task

1. Click **Attach Files** link in the Documents section in the Task screen. This displays the File Upload screen (see Figure 3.5).

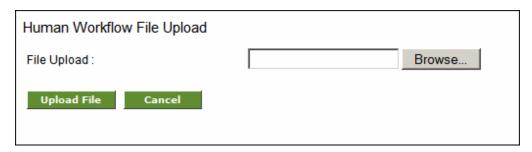


Figure 3.5: File Upload

- 2. Click **Browse** to select the file to be uploaded.
- 3. Click **Upload File**. This uploads the file and displays it in the Attach Files section in the Task screen (see Figure 3.6).

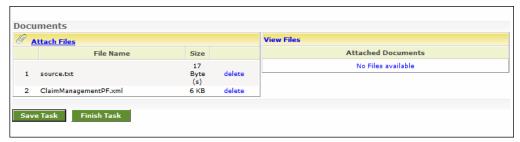


Figure 3.6: File Uploaded

4. Click **Save Task** to save the task. When you save a task, you can open it anytime. Click **Finish Task** to complete the task.



You can remove an attached file by clicking the **Delete** link.

Viewing Files Attached to a Task

Steps to view files attached to a Task

1. Once you attach files to a task and save the task, then on opening the task again, displays the attached files in the View Files section in the Task screen (see Figure 3.7).





Figure 3.7: View Attached Files

2. Click **View/Download** to open or save the file.



You can view the history of the task by clicking **Task History** link. For details on task history, refer to the **Task History** section.

ENTERING COMMENTS FOR A TASK

Steps to enter comments for a Task

1. Click the **Comments** icon () against the task for which you want to enter comments, on the Task Manager (with Tasks)/Staffs Task Manager screen. This displays the Comments screen (see Figure 3.8).

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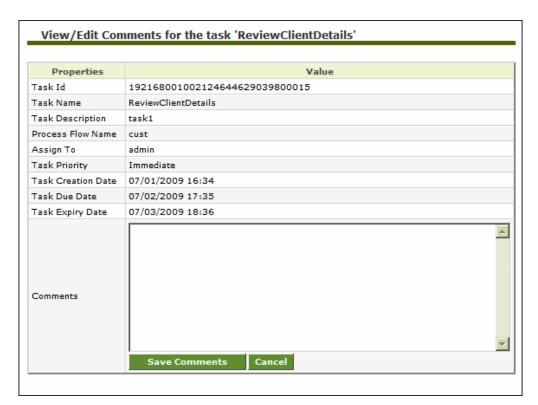


Figure 3.8: Comments screen

- 2. This screen displays all details associated with the selected task. Enter the comments for the task in the *Comments* field.
- Click Save Comments. This saves the entered comments and closes the screen.

TASK HISTORY

The Task History tab displays history of tasks of a process flow instance or task instance based on the entered search criteria. It displays the detailed information of each action taken on the task either by user or by the Adeptia Suite application.

In the Adeptia Suite this feature is available in:

BPM Suite	Workflow Suite	Integration Suite	ETL Suite
V	1	\checkmark	V



Steps to view Task history

- Click [+] My Tasks to expand the tree. All the items in the My Tasks category are displayed.
- Click Task History. The Task History screen is displayed (see Figure 3.9). Alternately, you can click the Task History tab on the Adeptia Homepage to view the Task History screen.



Figure 3.9: Select Search Criteria

- Enter the start date and start time in the Start Date and Start Time fields respectively.
- 4. Enter the end date and end time in the End Date and End Time fields respectively.



Click **Calendar** icon to select the *Start Date* and *End Date* from calendar.

This date range implies that the system will search the **Task History** for tasks that have been modified (including a task being saved or reassigned) within the entered date and time range.

- 5. You can search for tasks based on a process instance or task instance; by selecting the appropriate radio button in the Based On field. If Process Instance is selected, then it displays the latest task for all process instances that match the entered search criteria. If Task Instance is selected, then it displays all tasks within the entered search criteria. By default, Process Instance is selected.
- 6. If Process Instance option is selected, you can search for the latest task of a process instance based on a specific date range, by entering the start and end dates and time in their respective fields. You can further filter the search by selecting the process status as Executed, Running or Aborted from the Status drop-down list. Additionally, you can search for the task of a particular process instance by selecting Instance Name from the Search drop-down list and then entering the instance name in the adjoining text box. Once you have entered all criteria, click Search button. This displays the latest task of all process instances that match the entered criteria (see Figure 3.10).

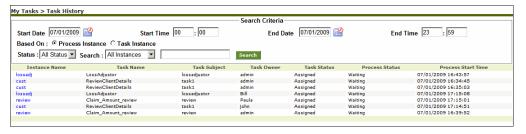


Figure 3.10: Process Instance Search Results



- 7. This screen displays the following information:
- Instance Name: This is the process flow description. If this description is dynamically overridden, the latest description is displayed.
- Task Name: This is the name of the Workflow task.
- *Task Subject*: This is the task description that has been dynamically set or else defined. The latest description is displayed.
- Task Owner: This is the name of the user to whom the task is assigned.
- Task Status: This is the status of task as Assigned, Overdue, Expired or Completed. The latest task status within the specified time range is displayed.
- Process Status: This is the status of the process as Running, Executed, waiting or Aborted. The latest process status within the specified time range is displayed.
- *Process Start Time*: This is the start time of the process instance. It is retrieved from the Process Flow Log.
- 8. Alternately, if you select the *Task Instance* radio button, then you can search for all tasks which are completed or are still running within a specific date range by entering the start and end dates and time in their respective fields. You can further filter the search by selecting the task status as New, Completed, Overdue or Expired from the *Status* drop-down list. Additionally, you can search for a particular task by selecting Task Name, Task Subject, or Owner from the *Search* drop-down list and then entering the value in the adjoining text box. Once you have entered all criteria, click **Search** button. This displays all tasks that are completed or still running, within the entered criteria (see Figure 3.11).

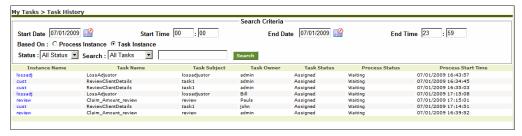


Figure 3.11: Task Search Results

- 9. This screen displays the following information:
- *Instance Name*: This is the process flow description. If this description is dynamically overridden, the latest description is displayed.
- Task Name: This is the name of Workflow task.
- *Task Subject*: This is the task description that has been dynamically set or else defined. The latest description is displayed.
- Task Owner: This is the name of the user to whom the task is assigned.
- Task Status: This is the status of task as Assigned, Overdue, Expired or Completed. The latest task status within the specified time range is displayed.
- Process Status: This is the status of the process as Running, Executed, waiting or Aborted. The latest process status within the specified time range is displayed.
- Process Start Time: This is the start time of the process instance. It is retrieved from the Process Flow Log.



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You can use wildcards in the value to search.

 Click the *Instance name* whose details you want to view, on Process Instance Search Results or Task Search Results screen. The Process Instance Details screen is displayed (see Figure 3.12).

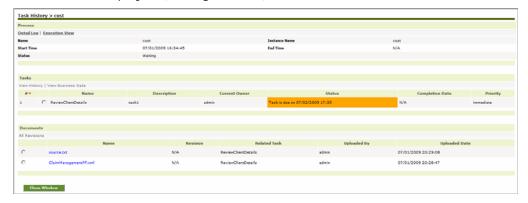


Figure 3.12: Process Instance Details

11. This screen is divided into three parts. The first part displays information related to a process instance. You can view the process flow log by clicking the **Detail Log** link. The Process Flow Log screen is displayed (see Figure 3.13).

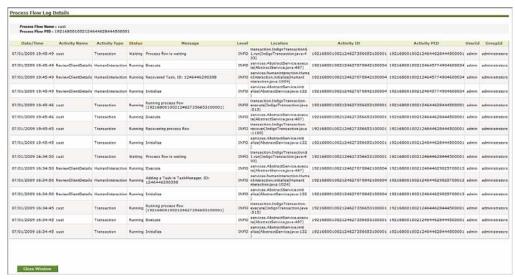


Figure 3.13: Process Flow Log screen

 Click Close Window to close this screen and return to the Process Instance Details screen. You can view the graphical representation of the process flow by clicking Execution View link (see Figure 3.14).



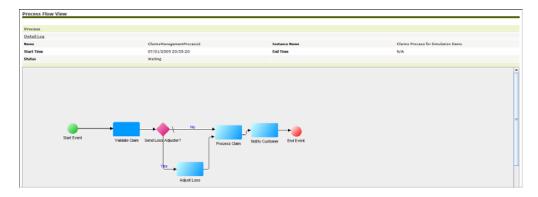


Figure 3.14: View Process Flow

13. The second part of the Process Instance Details screen displays information related to the tasks of the process flow. You can view the history of the task by selecting a task and clicking the **View History** link. The Task History screen is displayed (see Figure 3.15).



Figure 3.15: Task History

14. This screen displays the task history in descending order. If business data is added or modified for the task, then the **Business Data** link appears at that stage. Click the **Business Data** link to view the details of the Business Data at that point for the task (see Figure 3.16).

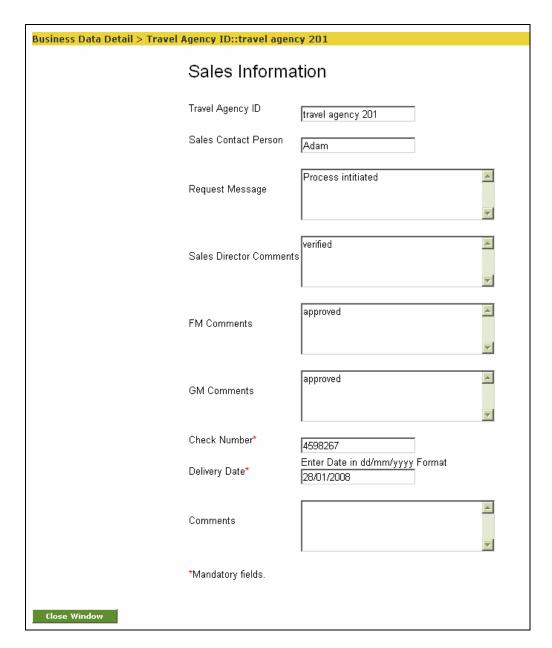


Figure 3.16: Business Data Detail

- 15. Alternately, you can view the details of the business data from the Process Instance Details screen by selecting the task and clicking the View Business Data link. It displays the latest details of the business data.
- 16. The third part of the Process Instance Details screen displays information related to the documents that have been uploaded in the process instance. You can view the revisions of a document by selecting the document and clicking the **All Revisions** link. Click **Close Window** to return to the Task History screen. Alternately, you can view the documents from the Task History screen, by clicking the document in the *Uploaded File* field.



Usage Scenario

A process flow *Incentive Process* is run twice thus generating two process instances namely *Incentive Process 01-23-08 10-03-14* and *Incentive Process 01-23-08 10-12-37*. Process instance *Incentive Process 01-23-08 10-03-14* has six tasks namely *HWF_SalesDataEntry*, *HWF_SalesDirectorReview*, *HWF_SalesDirectorReview*, *HWF_FMReview*, *HWF_GMReview* and *HWF_Payment*.

HWF_SalesDataEntry is started at 10:00AM and is completed at 11:30AM. However, it is modified and saved at 11:00AM. Once the task is completed, its status changes from *Assigned* to *Completed*. Next *HWF_SalesSupportDataEntry* is executed starting at 11:30AM and completing at 12:30PM. *HWF_SalesDirectorReview* is started at 12:30PM and completed at 2:00PM.

Case:

Search Based on Process Instance

If you search the task log for tasks of the *Incentive Process 01-23-08 10-03-14* process instance, between 10:00AM and 12:15PM, based on *Process Instance*, then it will display *HWF_SalesSupportDataEntry*, as that is the latest task of the process instance within the specified time range (see Figure 3.17).



Figure 3.17: Tasks search based on Process Instance

Search Based on Task Instance

If you search the task log for tasks of the *Incentive Process 01-23-08 10-03-14* process instance, between 10:00AM and 12:15PM, based on *Task Instance*, then it will display *HWF_SalesDataEntry* and *HWF_SalesSupportDataEntry*, as these are the tasks of the process instance, which are modified within the specified time range (see Figure 3.18).



Figure 3.18: Tasks search based on Task Instance



MY DOCUMENTS



4 DOCUMENT MANAGER

You can view and download documents associated with a process flow or tasks associated with a process flow or WebDAV folders using the *Document Manager* feature. A Document Manager is an applet, which allows you to manage documents in a Process Flow or WebDAV repository.

Web-based Distributed Authoring and Versioning (WebDAV) is a set of extensions to the HTTP protocol that enables users to collaboratively edit and manage documents (files) on remote web servers.

In the Adeptia Suite this feature is available in:

BPM Suite	Workflow Suite	Integration Suite	ETL Suite
\checkmark	1	\checkmark	V

This chapter describes the following tasks:

- Opening Document Manager
- Viewing a Document
- Downloading a Document
- Searching a Folder or Document

OPENING DOCUMENT MANAGER

Steps to open Document Manager

- Click [+] My Documents to expand the tree. All the items in the My Documents category are displayed.
- 2. Click **Document Manager**. The Document Manager applet is displayed (see Figure 4.1).

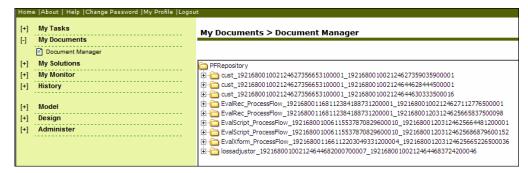


Figure 4.1: Document Repository



- 3. By default, this screen displays the Process Flow Repository of the group of the logged-in user. If the Administrator is logged in, then this screen will display the *Process Flow Repository* of the *Administrators* group.
- 4. The process flow repository includes folders that are created each time an instance of the process flow is executed. It is created in the format:

Process Flow Name_Process Flow Object ID_Process Flow Instance ID

For example,

EvalXform_ProcessFlow_192168001166112203049331200004_192168001203 124625665226500036

5. The folder comprises of all intermediate files associated with that process flow (see Figure 4.2).

Figure 4.2: Intermediate Process Flow Files



If no process flow is executed for 14 days, then clicking the applet will display the message "No Repository" in the process flow repository screen.

You can also view the WebDAV Repository in the Document Manager screen, by changing the *abpm.hi.repository.type* property under *Services -> Human Workflow* properties. The value of this property is set to default, which displays the Process Flow Repository. You can change this value to *WebDAV* to view the WebDAV Repository.

VIEWING A DOCUMENT

You can view a document in the Document Manager.

Steps to view a document

1. Click the Process Flow folder whose associated document you want to view. Navigate to the document (see Figure 4.3).



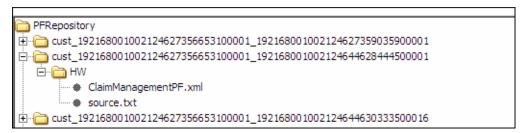


Figure 4.3: Select Document

2. Right-click the document and select **View** from the Right drop-down menu (see Figure 4.4).

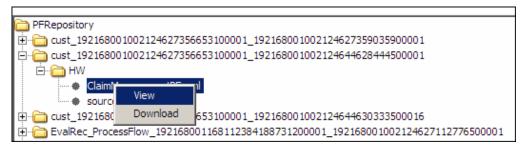


Figure 4.4: Select View

3. This displays the selected document in a new screen (see Figure 4.5).

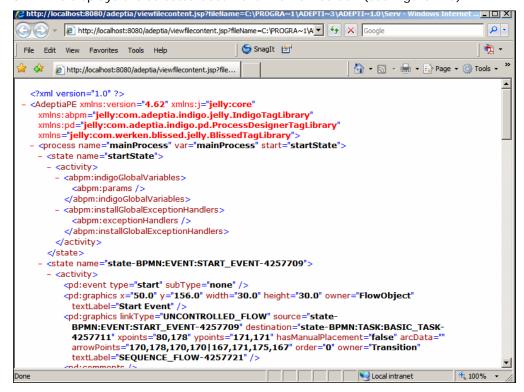


Figure 4.5: View Document



DOWNLOADING A DOCUMENT

Steps to download a document

- 1. Click the Process Flow folder whose associated document you want to download. Navigate to the document (refer to Figure 4.3).
- 2. Right-click the document and select **Download** from the Right drop-down menu (see Figure 4.6).

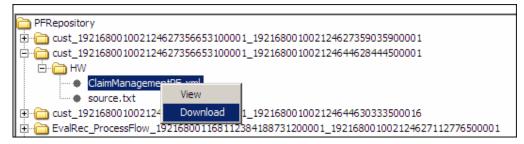


Figure 4.6: Select Download

3. This displays the Download File screen (see Figure 4.7).



Figure 4.7: Download File

4. Click **Save**. This displays the Save As screen (see Figure 4.8).

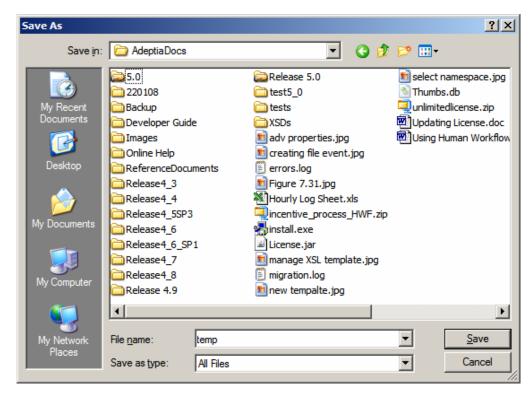


Figure 4.8: Save As

5. Click **Save**. This saves the file in the specified location.

SEARCHING A FOLDER OR DOCUMENT

If the repository is too long, then you can search for a particular folder or even a document.

Steps to search for a folder or document

1. Right-click the Repository and select **Search** from the Right drop-down menu (see Figure 4.9).

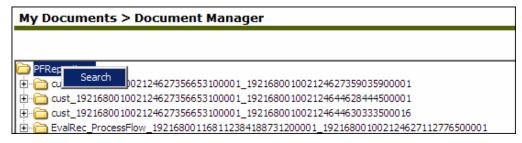


Figure 4.9: Select Search

2. This displays the Input screen (see Figure 4.10).

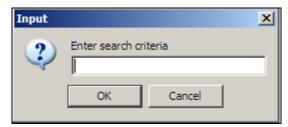
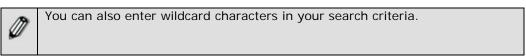


Figure 4.10: Input

3. Enter the name of the folder or document that you want to search for in the *Enter search criteria* field.



4. If you enter *Cust** in the *search criteria* field, then all process flow folders and documents starting with *Cust* are selected (see Figure 4.11). If you enter *Eval** in the search criteria field, then all process flow folders and documents starting with Eval are selected (see Figure 4.12).

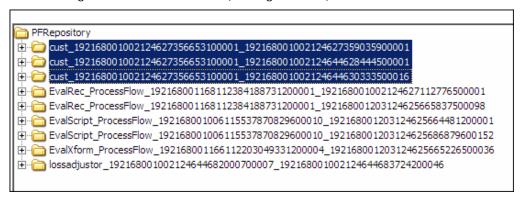


Figure 4.11: Selected Folders



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Figure 4.12: Selected Folders and Documents



MY SOLUTIONS



5 Using My Solutions

My Solutions are form-based applications created using web forms. These forms are created by a developer and are available under 'My Solutions' link in the Workspace Menu.

In the Adeptia Suite this feature is available in:

BPM Suite	Workflow Suite	Integration Suite	ETL Suite
V	V	\checkmark	V

EXECUTING A SOLUTION

All forms that are created with links and are activated by a developer will get listed in the *My Solutions* menu.

Steps to execute a solution

- 1. Click [+] My Solutions to expand the tree. All the items (Category Names) in the My Solutions are displayed.
- Click [+] <Category Name> to expand the tree. The Solution(s) is displayed (see Figure 5.1).

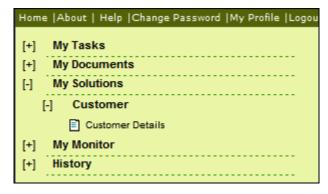


Figure 5.1: Major and Minor Level Category Names in My Solutions Menu

3. Click the Solution to display the application (see Figure 5.2).

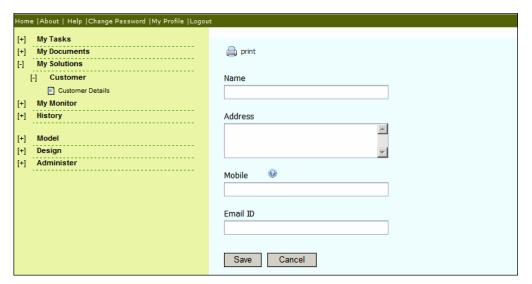


Figure 5.2: Web Form

- 1. Enter details as required.
- 2. If any data that is entered does not conform to the validation defined for the field, a message is displayed. (see Figure 5.3).

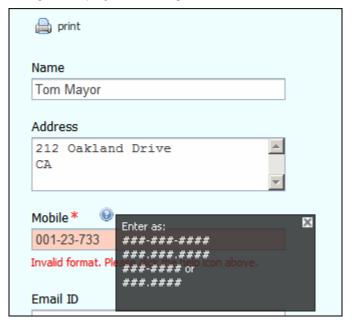


Figure 5.3: Validation Message

3. Once you have entered all details, click appropriate button to submit the application. It performs the action specified while creating the application (either triggering a process flow or starting another application).





MY MONITOR



6 Monitoring Solutions

In this section of Adeptia Suite, all process flows (which are not started from another process flow) are referred to as Solutions.

Adeptia Suite allows you to view, execute and monitor instances of all process flows. It provides details of all instances of process flows within a specified date range. Additionally, it also displays details of all tasks associated with a selected process flow.



The child process flows are not displayed separately. However, the information related to their tasks is included in their parent process flows.

In the Adeptia Suite this feature is available in:

BPM Suite	Workflow Suite	Integration Suite	ETL Suite
√	V		

Steps to monitor solutions

Click [+] My Monitor to expand the tree and then click Solutions. This
displays the Solution Monitor screen (see Figure 6.1).



Figure 6.1: Solution Monitor

- 2. This screen displays execution information of various solutions and their details as on the current date.
- 3. You can also view solutions within a specific date and time range. Click () icon in the upper right corner of the screen. This displays the date and time range fields (see Figure 6.2).

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Figure 6.2: Date and Time Range

4. Click **Calendar** icon () to enter the date range and enter the time in the respective fields. Once done, click **Apply** button. This displays the process flows and their details conforming to the specified time range.

The Solutions screen is divided into three panes:

- Solutions
- Solution Details
- Solution Instances

SOLUTIONS

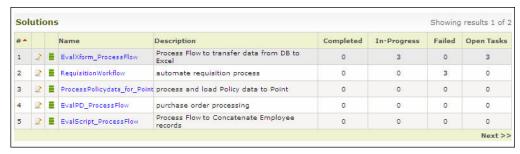


Figure 6.3: Solutions

This pane displays information of all active process flows conforming to the specified date and time range (if specified). However, it does not display information of any child or sub process flows of a parent process flow. You can execute a process flow by clicking **Start Solution** () icon.



The **Start Solution** icon appears only for those process flows for which you have the *execute* permission.



All details of the process flow are displayed. In addition to the name and description of the process flow, it also displays the count of instances of the process flow. It displays the count for the following solutions:

- Completed and executed successfully
- Currently running, or are in progress
- In waiting or queued state, and
- Failed or were aborted

Additionally, if the process flow comprises of a human workflow task which has been initiated, but is yet to be completed, it is displayed in the *Open Tasks* column. If the task is due today, then it displays the count of the currently running tasks of all instances of the process flow. It will be displayed until the current task that is running is completed. However, if the task is not due on the current date (and a check is being made for a date that has already passed), then NA is displayed. These tasks could be in queued or overdue state.

The count of tasks includes the tasks of the parent process flow and all its child subprocess flows too. Thus, for example if a process flow displays 9 open tasks, of which 4 tasks are displayed as in-progress, then it could indicate that the remaining tasks belong to the child processes of the parent process flow.



By default, process flows are displayed as sorted on the current date and the first process flow is displayed as selected. If you select any process

flow and click **Refresh** () icon in the upper right-corner of the screen, all the sections will be refreshed with latest information.

A total of 5 solutions are displayed at a time. However, if there are more than 5 solutions, then you can click the <Next> or <Pre>revious> links to navigate the solutions list. At the top right corner of the Solutions section, the total number of pages of the solutions list is displayed.

Solution Dashboard

You can track process variables defined for a process flow using the *Process Variable Tracker* feature defined in the Solution Dashboard. This enables you to search for a particular process variable at any time. However, these variables will appear in the Solution Dashboard and can be tracked only when the developer selects the *Track Variables* and *Retain Variable XML* options in the Process Designer, while designing the process flow. For details, refer to the *Creating Process Flow* section in the *Developer Guide*.



When you execute a process flow, the Process Variable Tracker checks process flow variables defined for the process flow and inserts their values in the Process Tracker tables. You can view this data in the Solution Dashboard.

Viewing Solution Dashboard

Steps to view Solution Dashboard

 Click Solution Dashboard (■) icon against the process flow whose dashboard you want to view, in the Solutions screen. This displays the Solution Dashboard screen. (see Figure 6.4)

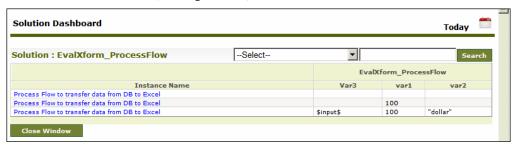


Figure 6.4: Solution Dashboard

- 2. This screen displays all process variables defined (for all parent and child process flows) for all instances of the selected process flow. It displays the instance name of the parent flow (or overridden description, if it is overridden by the developer at design time). This screen is divided into two parts:
 - Search Criteria
 - Process Variable Data
- 3. You can search for process flows and their variables, based on the date and
 - time range by clicking () icon in the upper right corner of the screen. This displays the date and time range fields (refer to Figure 6.2). Enter the date range and enter the time in the respective fields. Once done, click **Apply** button. This displays the process flows and their process variable details conforming to the specified time range.
- 4. Alternately, you can search for process flows and their variables, based on the Process Variable search criteria. Select the process variable name that you want to search, from the *Select* drop-down menu. Then, enter some search criteria (such as name of variable) in the text field, and click **Search** button. This displays the process flow(s) with the specified process variable (see Figure 6.5).





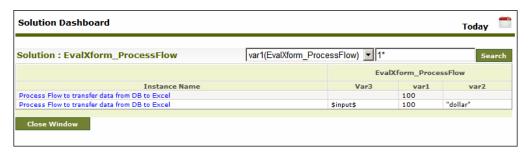


Figure 6.5: Searched Solutions based on Process Variable Search



5. You can click the *Instance Name* link to view the instance details in the of Process Flow History screen (refer to Figure 6.10)

SOLUTIONS DETAILS



Figure 6.6: Graphical Display of Selected Solution



This section displays the graphical display of all instances and tasks associated with the selected process flow. It displays four types of graphs:

- Solution Start Trend
- Task Completion Trend
- Current Tasks Status
- Current User Workload

Solution Start Trend

This graph displays a start trend of the instances of the selected process flow, which were initiated in the last 10 days (including today). This information helps in assessing the anticipated workload, which in turn helps in efficient planning.

Task Completion Trend

This graph displays a representation of tasks associated the selected process flow, which were completed in the last 5 days and those which are due in the next 5 days related to the date of the selected process flow. The completed tasks are depicted in blue and the due tasks are depicted in orange (which includes tasks due for today). This information helps in analyzing the recent trend of tasks.

Current Tasks Status

This graph displays a representation of status of the running tasks of the selected process flow, as on the current day. Tasks that are running but are not due for completion today are referred to have an *On Track* status and are depicted in green color. Tasks that are running and are due for completion today are referred to have an *At Risk* status and are depicted in orange color. Tasks that are running and are already overdue are referred to have an *Over Due* status and are depicted in red color. This information helps analyze the performance rate and compare the number of tasks that are on track and try to reduce the number of tasks that are overdue.

Current User Workload

This graph displays a representation of the current tasks assigned to each user associated with selected process flow. You can assign tasks to either user group, referred to as business roles, or simply to an individual user. If you assign tasks of a process flow to a business role, then this graph will display the business role bar for the selected process flow. Else, if you assign tasks of a process flow to individual users, then this graph will display the different bars representing each user. However, if you assign tasks to both business roles and users then this graph will display bars for both, the business roles and the users.



SOLUTION INSTANCES



Figure 6.7: Solution Instances of Selected Solution

This section displays information of all instances of the selected process flow conforming to the specified date and time range (if specified). It displays a dynamic description of the instance, clicking on which will display a history of all tasks associated with this instance. For details, refer to <u>Task History of Process Flow</u> section. Additionally, this section also displays the current status of the selected process flow instance, the name of the person who executed this instance, the start time of the instance and its total execution time.



The instances which are queued but not yet executed are not displayed in this section. However, they are included in the count of *In-Progress* column, in the *Existing Solutions* section.

At any time, you can terminate a process flow by clicking $(^{\boxtimes})$ icon. When you click this icon, a confirm terminate screen is displayed (see Figure 6.8).

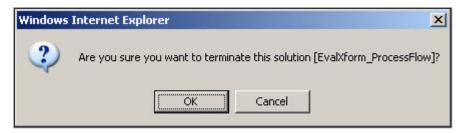


Figure 6.8: Confirm Terminate

If you click \mathbf{OK} , then it will display a message in the selected instance, till the time the process flow is aborted. (see Figure 6.9).





Figure 6.9: Terminate Solution

Click Refresh to refresh the screen and proceed.



If you try to execute this process flow from another window, then a screen with the message, "Your request cannot be submitted" is displayed.

Only users with *execute* permission or admin rights can terminate a process flow.

Task History of Process Flow

You can view all tasks that are associated with a process flow. When you click on the description of the process flow instance, then the Task History screen is displayed (see Figure 6.10).

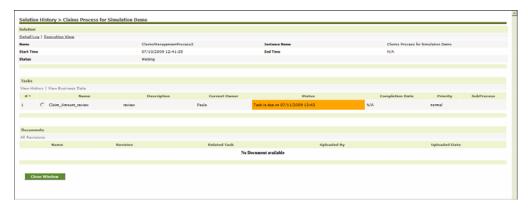


Figure 6.10: Task History

This screen displays details of all tasks related to the selected process flow. It also includes details of tasks for all child processes of the process flow. This information is included in the *sub Process* column and is provided as a link. Clicking this link will display all details of the tasks associated with the child process.



7 MONITORING USER PERFORMANCE

Adeptia Suite allows you to view and monitor the performance of users. It provides details of all instances of tasks assigned to a user or business role. Additionally, it also displays the task history of process flows associated with the tasks, within a specified date range.



Task details are displayed for only those users who are members of the group of the logged-in user.

In the Adeptia Suite this feature is available in:

BPM Suite	Workflow Suite	Integration Suite	ETL Suite
\checkmark	V		

Steps to monitor user performance

1. Click [+] My Monitor to expand the tree and then click User Performance. This displays the User Performance screen (see Figure 7.1 Error! Reference source not found.).

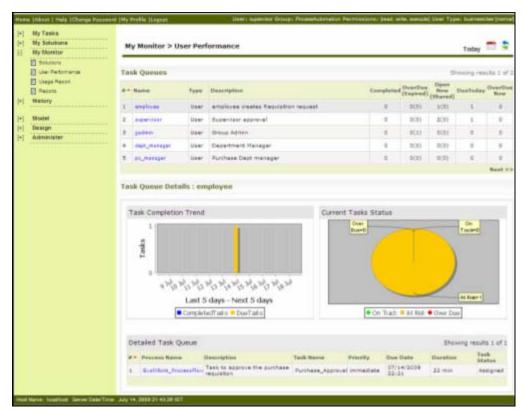


Figure 7.1: User Performance Monitor

- 2. This screen displays execution information of various tasks assigned to users and their details as on the current date.
- 3. You can also view users' performance within a specific date and time range.
 - Click () icon in the upper right corner of the screen. This displays the date and time range fields (refer to Figure 6.2).
- 4. Click **Calendar** icon () to enter the date range and enter the time in the respective fields. Once done, click **Apply** button. This displays the users and their task details conforming to the specified time range.

The User Performance screen is divided into three panes:

- Task Queues
- Task Queue Details
- Detailed Task Queue



TASK QUEUES



Figure 7.2: Task Queues

This pane displays information of all tasks assigned to active users belonging to the group of the logged-in user and conforming to the specified date and time range (if specified).

All details of the tasks assigned to users are displayed. In addition to the name and type of users and their description, it also displays the count and status of tasks assigned to the users. It displays the count for the following tasks:

- Completed and executed successfully
- Overdue or expired
- Open currently and shared
- Due Today
- Overdue Now

If a task that is assigned to a user which was overdue and has expired, it is displayed in *Overdue (Expired)* format. For example, if 2 tasks were overdue, of which one has now expired then it is displayed as 2 (1).

A task that is assigned to more than one user is referred to as a shared task. If a task is open and is a shared task, it is displayed in Open (Shared) format. For example, if 2 tasks are open for a user, of which one is individually assigned and the other is a shared task, then it is displayed as 2(1).



By default, tasks are displayed as sorted on the current date and the first user is displayed as selected. You can sort the tasks in ascending or descending order. Additionally, if you select any user and click **Refresh**

() icon in the upper right-corner of the screen, all the sections will be refreshed with latest information.

A total of 5 users are displayed at a time. However, if there are more than 5 users, then you can click the **<Next>** or **<Previous>** links to navigate the users list. At the top right corner of the Task Queues section, the total number of pages of the users list is displayed.



TASK QUEUE DETAILS

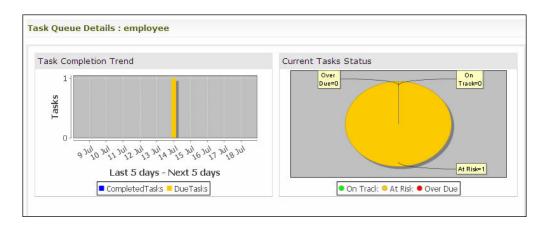


Figure 7.3: Graphical Display of Selected User

This section displays the graphical display of all tasks assigned to the selected user. It displays two types of graphs:

- Task Completion Trend
- Current Tasks Status

Task Completion Trend

This graph displays a representation of tasks assigned to the selected user, which were completed in the last 5 days and those which are due in the next 5 days related to the current date or specified date range. The completed tasks are depicted in blue and the due tasks are depicted in orange (which includes tasks due for today).

This information helps in analyzing the recent trend of tasks.

Current Tasks Status

This graph displays a representation of status of the running tasks of the selected user, as on the current day. Tasks that are running but are not due for completion today are referred to have an *On Track* status and are depicted in green color. Tasks that are running and are due for completion today are referred to have an *At Risk* status and are depicted in orange color. Tasks that are running and are already overdue are referred to have an *Over Due* status and are depicted in red color. This information helps analyze the performance rate of the selected user and compare the number of tasks that are on track and try to reduce the number of tasks that are overdue.

DETAILED TASK QUEUE





Figure 7.4: Detailed Task Queue of Selected User

This section displays information of all tasks assigned to the selected user, conforming to the specified date and time range (if specified). It displays a dynamic description of the process flow instance associated with tasks of the selected user. Clicking the process flow will display a history of all tasks associated with this instance. For details, refer to <u>Task History of Process Flow</u> section. Additionally, this section also displays the description of the process flow, name of task associated with the process flow, priority of the task, due date and time for the task, duration of task and task status.



8 VIEWING USAGE REPORT

Adeptia Suite allows you to view the performance report of a user group. It provides details of performance for current repository, process execution and data integration execution for the current month or within a specified date range. .



Performance report is displayed for the whole group of which the logged-in user is a member.

In the Adeptia Suite this feature is available in:

BPM Suite	Workflow Suite	Integration Suite	ETL Suite
$\sqrt{}$	V	\checkmark	V

Steps to monitor usage report

Click [+] My Monitor to expand the tree and then click Usage Report. This
displays the Usage Report screen (see Figure 8.1).

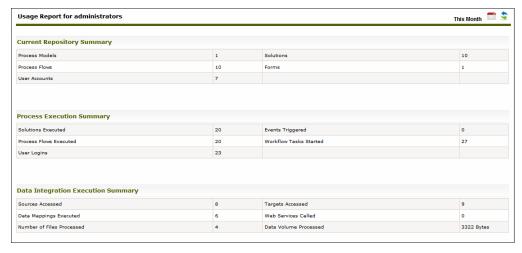


Figure 8.1: Usage Report

- 2. This screen displays a performance summary of the selected group till the current date in the current month.
- 3. You can also view the report within a specific date and time range. Click () icon in the upper right corner of the screen. This displays the date and time range fields (refer to Figure 6.2).



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4. Click **Calendar** icon () to enter the date range and enter the time in the respective fields. Once done, click **Apply** button. This displays the usage report conforming to the specified time range.

The Usage Report screen is divided into three panes:

- Current Repository Summary
- Process Execution Summary
- Data Integration Execution Summary

CURRENT REPOSITORY SUMMARY



Figure 8.2: Current Repository Summary

This pane displays total counts of performance of admin and the group user in various areas of repository. It displays the total number of Process Models created by the selected group. Additionally, it also displays the total number of Solutions (Parent Process Flows), and number of Process Flows (which includes Parent and Child Process Flows) created by the group. Further, it displays the total number of forms (which includes the custom application activities) and total count of users created by the group.

PROCESS EXECUTION SUMMARY



Figure 8.3: Process Execution Summary

This pane displays total counts of execution performance details of admin and the group user. It displays the total number of solution instances that have been executed (Executed, Aborted and Failed) for the selected group. It also displays the total number of process flow instances (Parent and Child Process Flows) that have been executed for the group. Additionally, it also displays the total count of events that have been triggered in the group. Further, it displays the total number of workflow tasks started in the selected group and the number of times users of this group have logged into Adeptia Suite.



All activities that are used in process flow execution are counted, irrespective of the activity being successful or unsuccessful.



DATA INTEGRATION EXECUTION SUMMARY



Figure 8.4: Data Integration Execution Summary

This pane displays total counts of execution performance details for admin and the group user in different areas of data integration. It displays the total number of Source activities created and target activities accessed by the selected group. Additionally, it also displays the total number of data mapping activities and web service activities used by the group. Further, it displays the total number of source file (File, Mail, FTP and LAN File) activities created for the selected group. It also displays the total amount of data (in Bytes) that is processed by all sources and web service activities that is used for the selected group.



All activities that are used in process flow execution are counted, irrespective of the activity being successful or unsuccessful.



You can refresh all the sections will be refreshed with latest information by clicking **Refresh** () icon in the upper right-corner of the screen.

9 VIEWING PROCESS FLOW REPORT

Adeptia Suite allows you to view a customized process flow report.

In the Adeptia Suite this feature is available in:

BPM Suite	Workflow Suite	Integration Suite	ETL Suite
\checkmark	1		

Steps to view process flow report

1. Click [+] My Monitor to expand the tree and then click Reports. This displays the Reports screen (see Figure 9.1).



Figure 9.1: Reports

2. Click the radio button against the report that you want to generate and then click **Execute**. This displays the Standard Process Flow Report screen (see Figure 9.2).

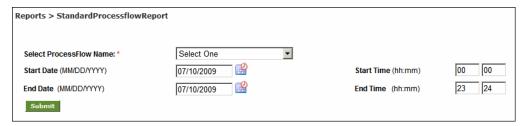


Figure 9.2: Standard Process Flow Report

- 3. Select the process flow name from the drop-down list.
- 4. Enter the Start Date, End Date, Start time and End time in their respective fields. Click **Calendar** icon () to enter the date range and enter the time in the respective fields.
- 5. Click **Submit**. This displays the Process Flow report in the Jasper Viewer (see Figure 9.3).

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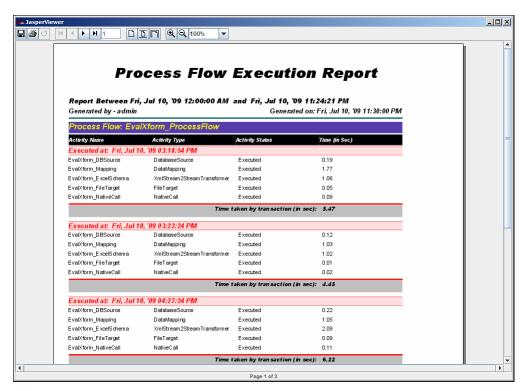


Figure 9.3: Process Flow Report in Jasper Viewer



HISTORY



10 VIEWING ADEPTIA SERVER LOGS

The information of the Adeptia Suite, process flows and activities are stored in the Adeptia Server Logs. There are three levels of logging:

- ERROR: This is the minimal setting. The following message types are logged:
 - **SEVERE** errors are the ones that cause premature termination.
 - **ERROR** and **FATAL** type messages deal with other runtime errors or unexpected conditions.
- **INFO:** This is the typical setting. It is the default setting in both the properties file and at the Process flow creation. The following message types are logged:
 - All messages as defined in the ERROR category.
 - Warning (WARN) messages such as runtime situations that are undesirable or unexpected, but not necessarily "wrong" will be logged.
 - All Process flow Start and End messages.
 - Detailed information about each Process flow and activity details (INFO) will be logged such as start and end time for each activity/module/node, number of records processed etc.
- **DEBUG:** This is the most detailed setting. It is expected that the user will want this level of detail to help with tracing errors, and troubleshooting. The following message types are logged:
 - All messages as defined in the ERROR category.
 - All messages as defined in the INFO category.
 - Detailed messages for each module, activity or node as it is executed including trace messages and flow information.
 - Display of Process flow global variables after end of every activity.
 - Any other information that may be helpful in debugging.

The Adeptia Suite logs are classified into four categories:

- Audit Trail Log
- Event Log
- System Log
- Process Flow Log



Access Control to Logs

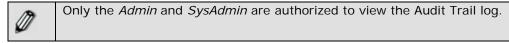
Log information that is displayed in the Adeptia Server logs is not filtered as per the user's permissions. Every user with the minimal read permissions can view the logs. Only the logs specific to the Users group are displayed to them. A user cannot view log information for other Groups.



11 VIEWING AUDIT TRAIL LOG

Audit Trail log maintains a log of all changes made to the Adeptia Suite activities. These changes include creating, editing, deleting and saving of activities. Additionally, it also includes comments, change of password and login/logout details.

You can view the Audit Trail log for a specific period by entering search criteria.



In the Adeptia Suite this feature is available in:

BPM Suite	Workflow Suite	Integration Suite	ETL Suite
$\sqrt{}$	V	\checkmark	\checkmark

Steps to view Audit Trail Logs

1. Click [+] History to expand the tree and then click Audit Trail. The Audit Trail Log screen is displayed (see Figure 11.1).



Figure 11.1: Audit Trail Log (Search Criteria)

- 2. Enter the start date and start time in the *Start Date* and *Start Time* fields respectively.
- 3. Enter the end date and end time in the *End Date* and *End Time* fields respectively.



- Select the user group and the user whose audit trail you want to view, from the Group Name and User Name drop-down lists respectively.
- 5. Select the audit type that you want to view, from the *Audit* drop-down list. You can view the audit trail log for either objects or Login/Logout details or both audit types. The Objects audit type displays all changes made to the



- Adeptia Suite activities, whereas the Login/Logout audit type displays only login/logout details. By default, both audit type details are displayed.
- 6. To view the audit log for the entered criteria, click **Submit** button. The audit log information for the selected criteria is displayed (see Figure 11.2).

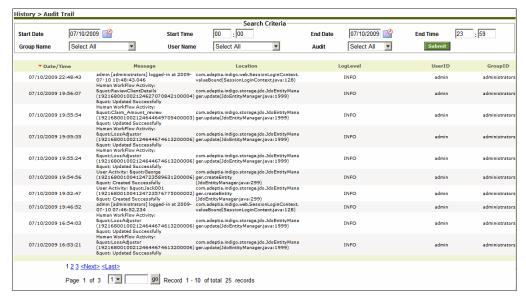


Figure 11.2: View Audit Trail Log

In case Log Level is ERROR, you can click ERROR link to view the details of the error.



By default, 10 logs are displayed at a time. If there are more than 10 logs, then you can navigate between pages by clicking the <First>, <Previous>, <Next>, <Last> or <Page Number> links. You can also enter the page number directly in the field below and click Go. It will display the specified page number.



12 VIEWING EVENT LOG

Event log displays only those messages, which related to the Triggers and Events of the Adeptia Suite.

In the Adeptia Suite this feature is available in:

BPM Suite	Workflow Suite	Integration Suite	ETL Suite
\checkmark	\checkmark	\checkmark	$\sqrt{}$

Steps to view Event Logs

1. Click [+] History to expand the tree and then click **Event Log**. The Event Log screen is displayed (see Figure 12.1).



Figure 12.1: Event Log (Search Criteria)

- 2. Enter the start date and start time in the *Start Date* and *Start Time* fields respectively.
- 3. Enter the end date and end time in the *End Date* and *End Time* fields respectively.



- 4. Select the logging level from the Select Level options.
- 5. To view the logs for the time interval defined above, click **Submit** button. The log information for the selected time interval is displayed (see Figure 12.2).





Figure 12.2: View Event Log



13 VIEWING SYSTEM LOG

System log displays messages related to the Adeptia Suite system. It also includes change of password and login/logout details.

In the Adeptia Suite this feature is available in:

BPM Suite	Workflow Suite	Integration Suite	ETL Suite
V	V	\checkmark	V

Steps to view System Logs

1. Click [+] **History** to expand the tree and then click **System Log**. The System Log screen is displayed (see Figure 13.1).



Figure 13.1: System Log (Search Criteria)

- 2. Enter the start date and start time in the *Start Date* and *Start Time* fields respectively.
- 3. Enter the end date and end time in the *End Date* and *End Time* fields respectively.



- 4. Select the logging level from the Select Level options.
- 5. To view the logs for the time interval defined above, click **Submit** button. The log information for the selected time interval is displayed (see Figure 13.2).



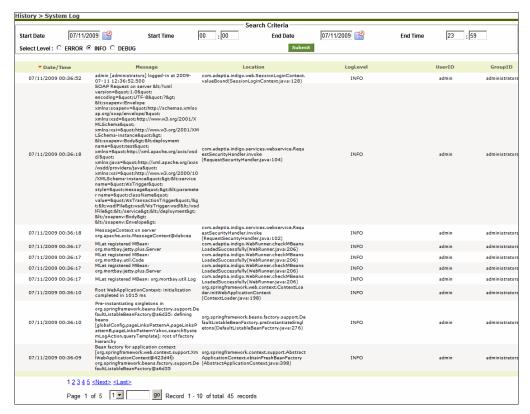


Figure 13.2: View System Log

6. In case Log Level is ERROR, you can click **ERROR** link to view the details of the error.



By default, 10 logs are displayed at a time. If there are more than 10 logs, then you can navigate between pages by clicking the <First>, <Previous>, <Next>, <Last> or <Page Number> links. You can also enter the page number directly in the field below and click Go. It will display the specified page number.



14 VIEWING PROCESS FLOW LOG

The Process Flow log displays all details about the process flow execution and its associated activities. It also displays the status of the associated (Parent or Child) Process Flow.

In the Adeptia Suite this feature is available in:

BPM Suite	Workflow Suite	Integration Suite	ETL Suite
V	V	\checkmark	V

Steps to view Process Flow log

 Click [+] History to expand the tree and then click Process Flow Log. The Process Flow Log screen is displayed (see Figure 14.1).



Figure 14.1: Process Flow Log (Search Criteria)

- 2. Enter the start date and start time in the *Start Date* and *Start Time* fields respectively.
- 3. Enter the end date and end time in the *End Date* and *End Time* fields respectively.



4. Select the Process flow from the *Process Flow Name* drop-down list.



5. Select the process flow status whether Executed, Aborted, Successful, Queued, Running or Waiting from the Status drop-down list.



- 6. To view the logs for the time interval defined above, click **Details** button. The log information for the selected time interval is displayed with the following information:
 - Parent/Child (whether the Process Flow is a Parent, Child, both or none)
 - Process Flow Name
 - Description
 - Status
 - User ID
 - Start Time
 - End Time
 - Action



In Process Flow log, maximum 500 records are shown.

 If the process flow is still running, then clicking **Details** button displays the Process Flow Logs with a **Context Info** link (see Figure 14.2).



Figure 14.2: View Process Flow Log (Running)

8. Clicking **Context Info** displays the Process Flow Context Information screen (see Figure 14.3).

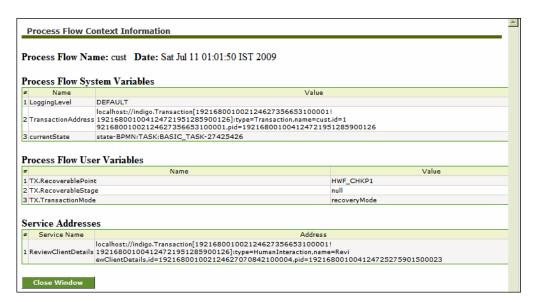


Figure 14.3: Process Flow Context Information

- 9. Click **Close Window** button to close this screen and return to the Process Flow Log screen.
- 10. To view execution details of each activity of the process flow, click **Details** link in the View Process Flow Log (Running) screen. The Process Flow Log Detail screen is displayed (see Figure 14.4). This screen is divided into two parts: *Process Flow Log Details* and *Parent/Child Process Flow Log Details*. The first part shows the details of the selected process flow. The second part shows the list of Parent or Child Process flow of the selected process flow. Following details are shown in Process Flow Log Details screen:
 - Process Flow Name
 - Process Flow PID
 - Process Flow Log Details
 - Date/Time
 - Activity Name
 - Activity Type
 - Status
 - Message
 - Level
 - Location
 - Activity ID
 - Activity PID
 - User ID
 - Group ID

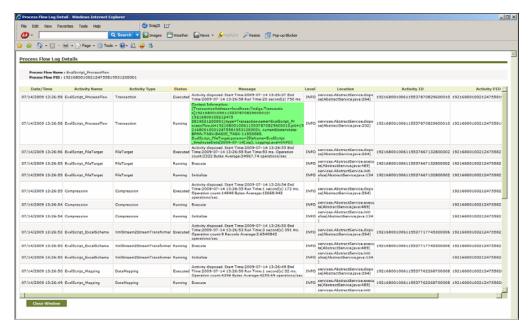


Figure 14.4: View Process Flow Detail Log



If a context variable is defined for the process flow, then its details are displayed under the heading Context Information, in the *Message* column.

If an Advance Database Target activity is executed in the process flow, then its record count details are displayed in the *Message* column. To view the log information of the Parent/Child Process Flow, click the required link from the *Action* column of the Parent/Child Process Flow Log Details section.

11. To view intermediate repository files of the process flow, click **Repository** link in the View Process Flow Log (Running) screen. A screen is displayed with list of repository files, created during execution of the Process Flow (see Figure 14.5).



Figure 14.5: Repository screen

- 12. To open any file from the list, click on the name of the file.
- 13. Clicking **Summary** link in the *Action* column displays the Process Flow Status screen (see Figure 14.6).



Figure 14.6: Process Flow Status

- 14. Click Close Window button to close this screen.
- 15. To view the information about the context variable used in the process flow, click the **Context Info** link in the View Process Flow Log (Running) screen.
- 16. If you want to view summary of the process flow execution for the selected time interval, click **Show Summary** button on the Process Flow Log (Search Criteria) screen. This displays the summary for all statuses of the process flow, based on the selected criteria (see Figure 14.7).

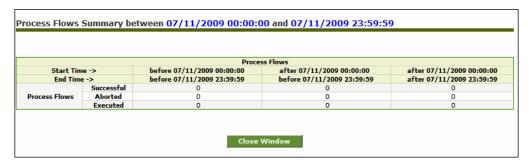


Figure 14.7: Summary for all Process Flows



The process flow summary displays the process flows based on three categories:

- Process flows that started before the specified start time and ended before the specified end time
- Process flows that started after the specified start time and ended before the specified end time
- Process flows that started after the specified start time and ended after the specified end time

You can view the process flow summary based on all criteria except the process flow status. The system always displays the summary for all process flows status.



15 ABOUT ADEPTIA INC.

Adeptia, an enterprise software company headquartered in Chicago, Illinois, provides a business process integration technology to easily and quickly automate business processes using industry-specific standards. Adeptia's unique product combines business process management with business-to-business integration. Adeptia's reusable and highly scalable technology has been deployed by Fortune 1000 companies. For more information, visit http://www.adeptia.com.

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