

Navigation:
Activities, Processes, &
Tasks

TABLE OF CONTENTS

ABOUT THIS GUIDE	5
OVERVIEW: ACTIVITIES, PROCESSES, & TASKS	7
IN THIS DOCUMENT	7
CONCEPTS: PROCESS NAVIGATOR TABLES	8
FIELDS FOR THE PROCESS NAVIGATOR TABLES.....	8
BASIC SKILLS: ACTIVITIES, PROCESSES, & TASKS	9
SKILL 1: VIEWING DOMAINS.....	9
SKILL 2: VIEWING ACTIVITIES	9
SKILL 3: VIEWING TASKS BY PROCESS AND ACTIVITY.....	10
PROCEDURE: MODIFYING THE PROCESS NAVIGATOR	13
STEP 1: VIEWING ACTIVE ACTIVITIES	13
STEP 2: VIEWING TASKS BY PROCESS AND ACTIVITY	13
EXERCISE 8221: ADD A TASK TO THE PROCESS NAVIGATOR	14
STEP 1: CHOOSE VIEW	14
STEP 2: ADD TASK.....	15
EXERCISE 8222: ADD A PROCESS TO THE PROCESS NAVIGATOR	16
STEP 1: ADD PROCESS.....	16
STEP 2: ADD TASKS FOR LABELS AND SPACES.....	17
STEP 3: ADD TASKS FOR VIEWS.....	18
STEP 4: ASSIGN PROCESSES TO USERS	18
REVIEW QUESTIONS: ACTIVITIES, PROCESSES, & TASKS	19
APPENDIX:	21
EXERCISE 8223: ADD DASHBOARD PROCESSES	23
STEP 1: ADD PROCESS.....	23
STEP 2: ADD TASKS FOR VIEWS.....	24
STEP 3: ASSIGN PROCESSES TO USERS	24
EXERCISE 8224: VIEW TASKS BY PROCESS & ACTIVITY WITH SMART CLIENT	25
STEP 1: VIEW TASKS BY PROCESS AND ACTIVITY	25
REVIEW SOLUTIONS: ACTIVITIES, PROCESSES, & TASKS	26

About This Guide

This guide is designed as a training tool for **ARCHIBUS V.19.1**. The guide may or may not be compatible with earlier or later versions of ARCHIBUS.

The following represents the estimated time a user will spend reading the document and completing the included exercises.

Training Topics:	Minutes:
Overview	:30
Exercise 8221: Add a Task to the Process Navigator	:05
Exercise 8222: Add a Process to the Process Navigator	:15
Estimated Time to Complete	<hr/> 0:50

Overview: Activities, Processes, & Tasks

All tasks available to Web Central, Smart Client, Smart Client Extension for AutoCAD, and Smart Client DWG Editor users are grouped into self-contained functional groups known as Activities. Each activity is created to meet requirements of a specific group of users for a specific domain area. The Process Navigator enables users to select tasks by drilling down from the Activity and Process levels. The Dashboard shows multiple views in a single page.

The Process Navigator displays tasks available to the currently logged-on user. The Process Navigator can and should be individually customized to only display tasks that are relevant to each user. Site Administrators can customize the Process Navigator to assign specific activities, processes, and tasks to specific users or user roles.

The Dashboard activities and their processes appear as tabs at the top of the main page and may be made visible by clicking on "Show Dashboard" or by setting the Dashboard as the default Navigator in the User Profile. Any activity can be set up in either or both the Process Navigator or the Process Dashboards, so that you can provide alternative navigation schemas to different types of users.

In This Document

The goal of this document is to give administrators the skills needed to create and modify processes for activities on the Process Navigator and the Dashboard. The administrator should be able to

- Create Processes and tasks on the Process Navigator
- Modify Dashboard Layouts
- Assign Processes and Dashboards to Users and Roles.



Concepts: Process Navigator Tables

In order to maintain an efficient use of the product and not waste time navigating from one screen to another, it is important for the administrator to go through the exercise of determining the users and “roles” expected to use ARCHIBUS before, during, and after implementation. Once roles have been determined, defining the needs and business processes required by each role will help determine how each user should navigate through the system and will determine what each role sees on their menus. This will be the most important step an organization makes in defining their system because it provides the basis for usability and security. Once this step has been completed, the administrator can begin working with the navigation tables.

The Process Navigator definition tables are organized so that an activity can be assigned to multiple products. The first levels of the Process Navigator drill down are:

- **Domains** (AFM_PRODUCTS) - are a bundling of activities.
- **Product Activities** (AFM_ACTPRODS) - assign activities to one or more Domains.

Activities organize tasks by process so that they communicate the business direction to staff in a form appropriate to each staff member’s role. This relation is defined in the following three tables:

- **Activities** (AFM_ACTIVITIES) - are collections of Processes.
- **Processes** (AFM_PROCESSES) - are menus of tasks appropriate for specific staff members.
- **Tasks** (AFM_PTASKS) - are specific views or actions that the staff member should execute.

Once the navigator processes and tasks are designed, administrators assign processes to either user roles or individual users to give users (or roles) access to the navigator menus. The following tables hold the relationship between navigation menus and users:

- **Users** (AFM_USERS) - are the list of staff members that can sign in to the system.
- **User Processes** (AFM_USERPROCS) - assign processes to users.
- **Roles** (AFM_ROLES) - are the list of roles for grouping staff. Each user record has one role.
- **Role Processes** (AFM_ROLEPROCS) - assign processes to roles and all associated users.

Fields for the Process Navigator Tables

Each table of the Process Navigator has some of the following fields. Where a field is present in multiple tables, its use is similar in each table.

- **Active?** Specifies whether the domain, activity, etc. is active and should be shown. If not, the item will not show, even if there is a license for it in the license file.
- **Display Order.** Order in which to show the items on the Process Navigator.
- **Title.** Title of item to display on the Process Navigator.
- **Small Icon.** Name of icon to use on the Process Navigator. Icon should be in the located in the \program files\Afmxx\tools\tomcat\webapps\archibus\schema\ab-system\graphics folder.
- **Summary.** Summary of item to display on the Solution Explorer.
- **Large Icon.** Name of graphic icon to display on the Solution Explorer.
- **Help Link.** Help link for the item.
- **SubFolder (Activities table only).** This value is currently unused. An extension is planned to use this value to optimize the search for files loaded for a particular activity.
- **Data Transfer Status.** Holds the result of the last data transfer operation used to move data into or out of this table. Useful for reviewing changes on processes and tasks that you have moved between projects.

Basic Skills: Activities, Processes, & Tasks

Before creating and modifying the menus on the Process Navigator and Dashboard, it is important to understand the database hierarchy which defines these navigational tools. Both the Process Navigator and Dashboards get their structure from the tables that define domains, activities, processes, and tasks. The below skills help users understand what can be done with each table in the hierarchy.

Skill 1: Viewing Domains

The ARCHIBUS applications are licensed by activity and activities are assigned to domains, so there is little to do with the domains but modify their Title, Active?, Display Order, Icon, Summary, and Help link fields. Using the “View Domains” view allows you to edit this information for each domain.

View Domains				
Domains				
	Domain	Active?	Display Order	Title
Edit	AbRPLM	Yes	1,000	Real Estate Portfolio Management
Edit	AbSMP	Yes	2,000	Strategic Master Planning
Edit	AbCapitalBudgets	Yes	3,000	Capital Planning
Edit	AbProject	Yes	4,000	Capital Project Management
Edit	AbSpace	Yes	5,000	Space Planning & Management
Edit	AbMove	Yes	6,000	Move Management
Edit	AbAsset	Yes	7,000	Asset Management
Edit	AbTelecom	Yes	8,000	Telecom and Cable Management
Edit	AbBldgOps	Yes	9,000	Building Operations
Edit	AbRisk	Yes	10,000	Environmental & Risk Management
Edit	AbWorkplaceServices	Yes	12,000	Workplace Services
Edit	ASCTeams	Yes	16,000	TEAMS
Edit	AbSolutionTemplates	Yes	20,000	Technologies
Edit	AbDashboards	Yes	30,000	Dashboard Navigation
Edit	AbSystem	Yes	32,000	System Administration

Edit Domain Details	
Domain	Save Cancel
Domain:*	AbRPLM
Active?:	Yes
Display Order:	1,000
Title:	Real Estate Portfolio Mana
Small Icon:	ab-icon-rplm32.gif
Large Icon:	ab-act-rplm.gif
Help Link:	
Summary:	Create an electronic inventory of your properties and your leases, complete with detailed data on

Skill 2: Viewing Activities

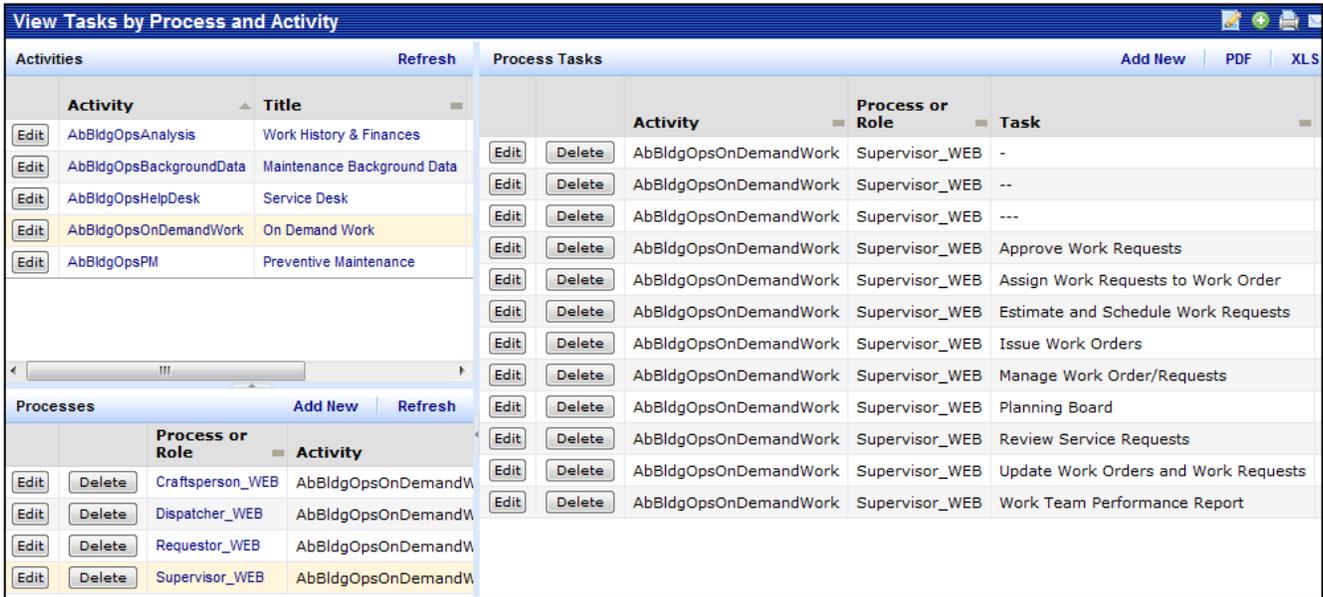
With the “View Activities” task, you modify Title, Active?, and Display Order fields for activities on the Navigator.

View Activities		
Activities		
	Activity	Title
Edit	AbAssetFleetManagement	Fleet Management
Edit	AbAssetManagement	Asset Portal
Edit	AbBldgOpsAnalysis	Work History & Finances
Edit	AbBldgOpsBackgroundData	Maintenance Background Data
Edit	AbBldgOpsHelpDesk	Service Desk
Edit	AbBldgOpsManageWork	Work Approver
Edit	AbBldgOpsOnDemandWork	On Demand Work
Edit	AbBldgOpsPerformWork	Craftsperson or Outsource Provider
Edit	AbBldgOpsPM	Preventive Maintenance
Edit	AbBldgOpsRequestWork	Work Requestor

Edit Activity Details	
Activity	Save Cancel
Activity:*	AbBldgOpsOnDemandWork
Title:	On Demand Work
Active?:	Yes
Display Order:	6,300
Small Icon:	ab-icon-bldgops.gif
Large Icon:	ab-act-bldgops.gif
SubFolder:	\\ab-products\bldgops\ondemandwork
Help Link:	
Summary:	Keep operational activities flowing smoothly. Manage scheduled work, craftspersons, tools, and resources from any location.

Skill 3: Viewing Tasks by Process and Activity

The “View Tasks by Process and Activity” view allows administrators to control the processes and tasks that appear on the Process Navigator menus. This view links menu options on the Navigator to the system files that run jobs and display forms, reports, dashboards, etc. This view can also be used to link reports that were not “published” to the Navigator with the View Definition Wizard or dashboard views that were created with the Dashboard Definition Wizard and need to be assigned to multiple processes. The view’s other important use is its ability to “Add New” and remove or “Delete” options from the Process Navigator.



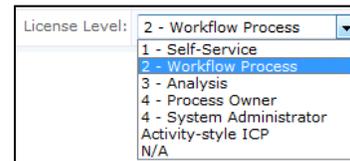
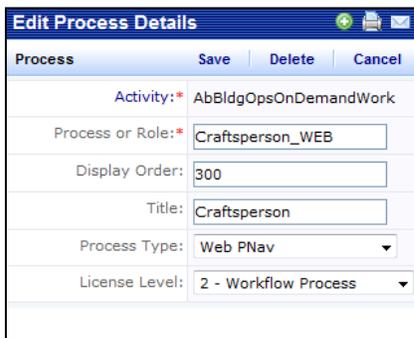
There are 3 primary functions of the “Tasks by Process and Activity” view. Each function allows the administrator to edit or remove options from the Navigator or Dashboard Menus.

Activities

Edit Activity Titles and Display Orders on the Navigator. The functionality is similar to that available with the “View Activities” view. Press the “Edit” button next to each activity to update the activity.

Processes

Edit Process Titles, Display Orders, License Levels, and the application or Process Type to which the Process belongs. Each ARCHIBUS application (Web Central, Windows, Smart Client, or AutoCAD) uses a Process Navigator and each may have different tasks for the same process. When assigning views, it is important to be clear to which Navigator each view should be assigned. Press the “Edit” button next to each process to update the process.



- **License Level** - If you are using level-style licensing, dictates the level the license level that the current user should have to use the views on that process. The Assign Processes to Roles and Assign Processes to Users views use this value to filter out processes that are inappropriate to assign to the selected user.
- **Process Type** - Is Web PNav, Web Dashboard, Smart Client, or Smart Client Extension depending on which Process Navigator the process should appear on. The other values are used only for Windows Client/Server.
- **Dashboard Layout View** - Holds the layout of panels (e.g. a 2x2 layout in dashboard-2-2-0-console.axvw) used in this Web Dashboard. This is used by the Dashboard Definition Wizard if the business process owner uses the wizard to create the dashboard.
- **Dashboard View** - Holds the actual .axvw file created by the Dashboard Definition Wizard that is loaded when the program displays this dashboard. You can also create this view by editing the .axvw file directly.

Tasks

Edit Task Titles, Display Order, Task Type, Task File or Action, Hotlist, Icons, Help Links and Security Groups. It is important to make sure that the Task Type and File fields are assigned logically based on the Process to which the task has been assigned. For example, if a Task is assigned to a Process whose Process Type is “Web PNav” or “Web Dashboard,” then the task should be assigned a Task Type of “Web URL” and the task file should have the extension “.axvw.” Press the “Edit” button next to each task to update the task.

- **Security Group** - Names the security group that the current user needs to be a member of in order for the task to show. NULL if all users assigned this process should see the item.
- **Hotlist User Name** - Name of specific user who added the item to the My Favorites view in ARCHIBUS Web Central. Used if the item is to appear only for the current user.

- **Task File** - As the below table indicates, this field lists the .axvw file, action, program, etc that the task runs. The value entered in this field must correspond to the value entered in the Task Type field.

Task Type	Task File	Task Action
Label	A label that should appear on the Process Navigator but invoke no action. Use one or more dashes (e.g. "-", "--", etc.) to define blank lines on the Proces Navigator.	
Web URL	A Web Central view file (ab-castd-define.axvw) or a valid Web address that includes "http://" or "https://"	(None)
Smart Client Grid	A Web Central format view file (e.g. ab-ap-eq-by-dp-gd.axvw) that has one, two, or three datasources and is used to define a grid that appears in the Smart Client.	
Smart Client CAD Grid	A Smart Client grid intended to be used with the Extension for AutoCAD. It typically holds one datasource with an asset table in it, shows the Drawing Name and Entity handle fields. The Smart Client shows the Drawing List after loading a CAD Grid view.	
Overlay Action	None	The action that should be invoked at the command line the Extension for AutoCAD when the user clicks that PNav item. Use "^C" for the "Esc" character, and semicolons for spaces.
Windows View	.avw	Used only by Windows Client/Server
Drawing View	.avw	Used only by Windows Client/Server
Fixed Format View	.rpt	Used only by Windows Client/Server
Windows Console URL	.htm	Used only by Windows Client/Server
Windows Browser URL	.htm	Used only by Windows Client/Server
Shell execute	.exe	Used only by Windows Client/Server
BasicScript Action	.abs	Used only by Windows Client/Server. Name of .abs function (e.g. "xBIVal").

The Windows program actions are only available from the Windows Client/Server environment. The Overlay actions are only available from the Windows Client/Server Overlay for AutoCAD.

Procedure: Modifying the Process Navigator

During and after implementation, it may become necessary to modify the menus that users see on a daily basis. New views and dashboards may have to be added to menus, some may need to be removed, and some should be available for one group of individuals but unavailable for others. The below steps outline the procedure for modifying the Navigator menus.

Step 1: Viewing Active Activities

The first thing to do when modifying the navigators is to make sure that the activities to which processes will be assigned are either Active or Inactive depending on the needs of the organization. By default, unlicensed activities will be unavailable and activities like the AbDashboard activities are set to “Inactive.” Before making any process-level changes, you may need or want to modify activities, i.e. manually activate dashboard activities or inactivate activities that the organization is not using.

1. In the Web Central application, use the Process Navigator to navigate to the System Administration > Add-In Manager process.
2. Click on the task called “View Activities.”
3. Choose the activity to modify and press “Edit.”
4. Set the “Active?” field to either Yes or No based on need.

Edit Activity Details	
Activity:	AbDashboardMyActivity1
Title:	Analyzing a Portfolio
Active?:	Yes
Display Order:	571
Small Icon:	ab-icon-task-label.gif
Large Icon:	ab-act-workplace.gif
SubFolder:	
Help Link:	

Step 2: Viewing Tasks by Process and Activity

1. In the Web Central application, use the Process Navigator to navigate to the System Administration > Add-In Manager process.
2. Click on the task called “View Tasks by Process and Activity.”
3. Choose the activity, process, or task to modify and press “Edit.”
4. Edit as necessary.
5. Press “Save.”

Edit Process Details	
Activity:	AbDashboardMyActivity1
Process or Role:	Dashboard 1
Display Order:	100
Title:	User Dashboard 1
Process Type:	Web Dashboard
License Level:	1 - Self-Service

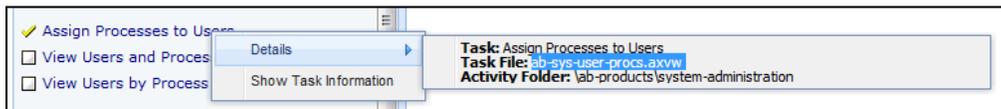
Exercise 8221: Add a Task to the Process Navigator

As an Administrator, you decide you need to add the “Assign Processes to Users” task to the System Integrator process under the System Administration activity and domain. Assuming that you will use an active and licensed activity, create a task for this view.

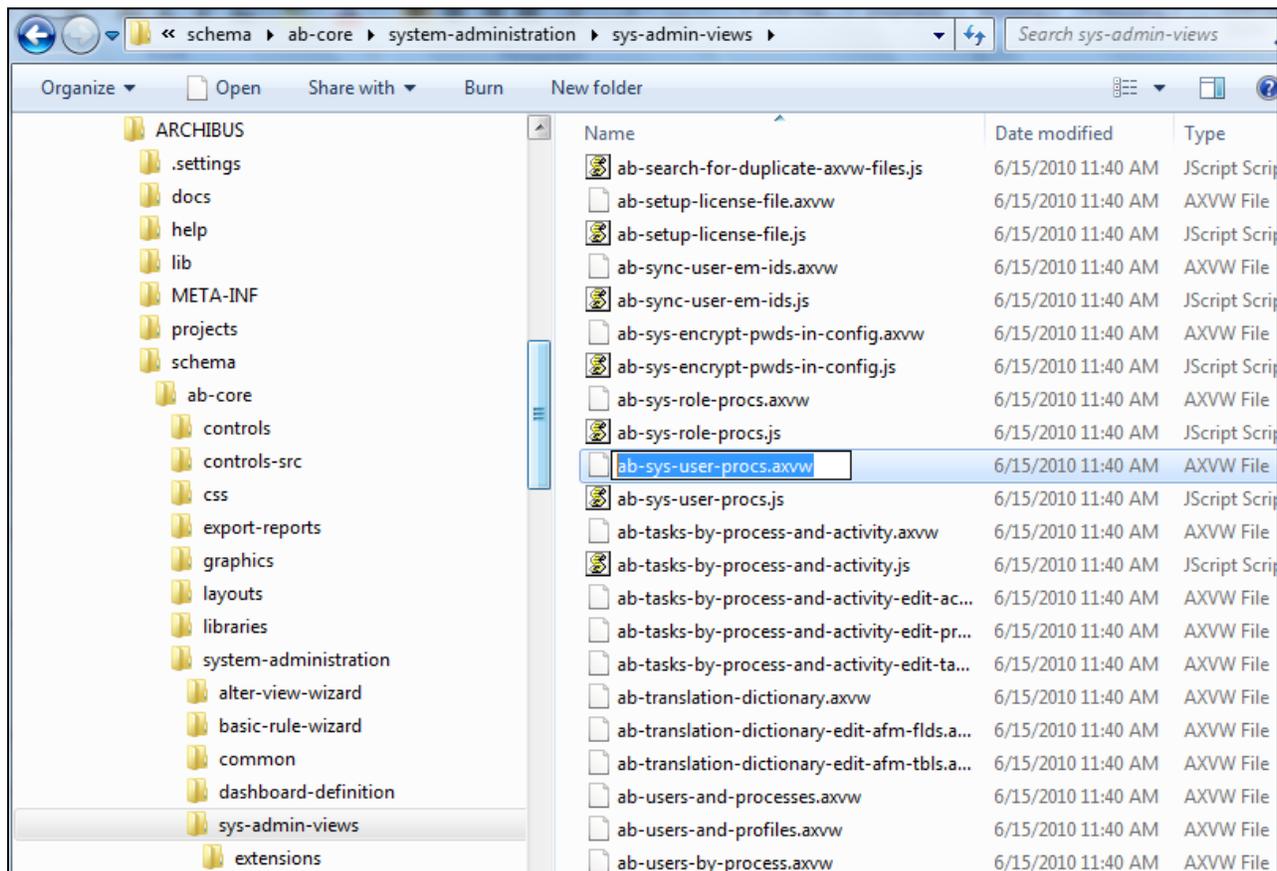
Step 1: Choose View

Before creating a task on the Navigator, it is important to know the name of the view file to which you are going to associate the task. The names of most ARCHIBUS views can be determined from the Navigator itself. Some views like Dashboards created with the Dashboard Definition Wizard may not be available from the Navigator. In these cases, an administrator may have to manually find the view file on the server. Most ARCHIBUS views are stored on the web application server machine in the “\archibus\schema\ab-products” folder. Customized views, especially those created with the View or Dashboard Definition Wizards should be located in the “\archibus\schema\per-site” folder.

1. Find the View on the Process Navigator. In this case, the view is located under System Administration > ARCHIBUS System Administration > ARCHIBUS Administrator.
2. Right-click on the task, choose “Details” and copy the name of the view file associated with the task.



3. Optionally, find the file on the server, right-click on the name, choose to “Rename” the file and copy.

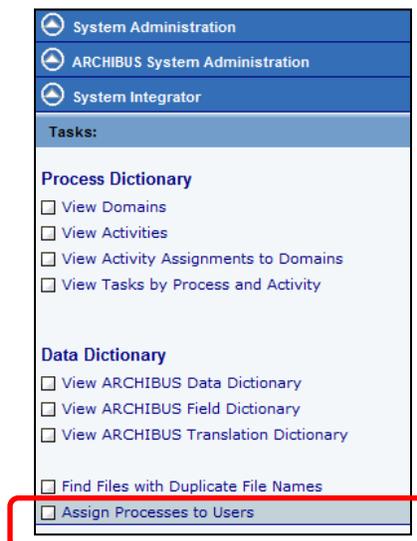


Step 2: Add Task

1. In the Web Central application, use the Process Navigator to navigate to the System Administration > Add-In Manager process.
2. Click on the task called “View Tasks by Process and Activity.”
3. Select the “AbSystemAdministration” activity.
4. Select the “System Integrator” process.
5. Click the “Add New” button on the Process Tasks panel.
6. Enter details for the new task.
7. Click the “Save” button on the Edit Tasks Details panel.

Process Task		Save	Delete	Cancel
Activity:*	AbSystemAdministration	Process or Role:*	System Integrator	
Task:*	Assign Processes to Users	Display Order:	2,000	
Task Type:	Web URL	Task File:	ab-sys-user-procs.axvw	
Task Action:		Is a Hotlist Task?:	No	
Large Icon:		Small Icon:	ab-icon-task.gif	
Hotlist Security Group:		Help Link:		
Internal Use 1:				

8. Refresh the Process Navigator.

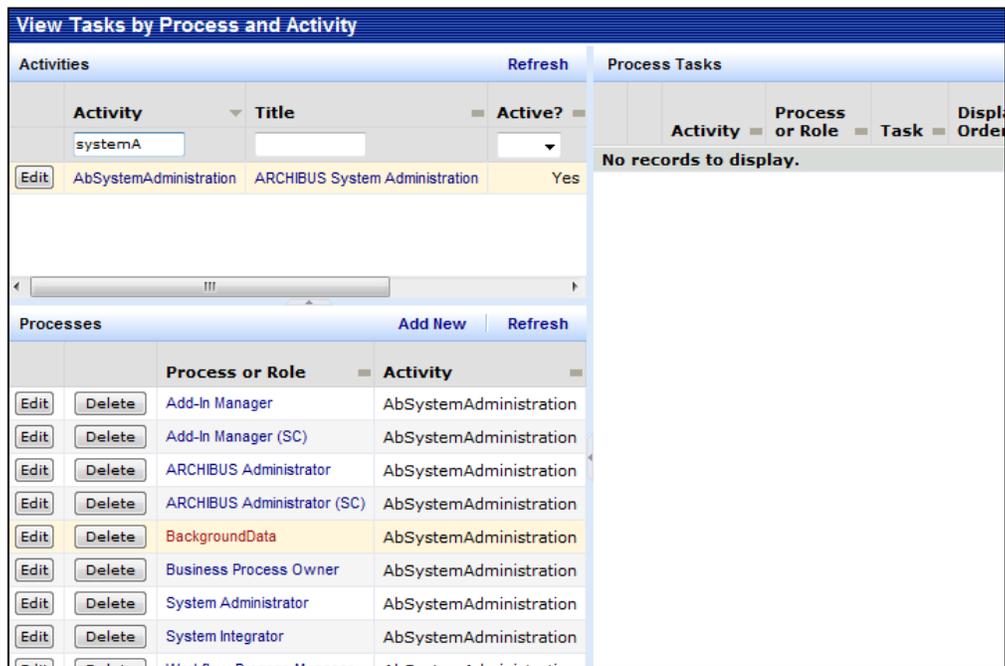


Exercise 8222: Add a Process to the Process Navigator

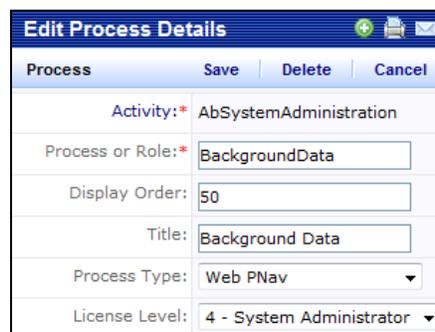
As an Administrator, you decide you need a process where you can enter and modify all background data for all ARCHIBUS domains. Assuming that you will use an active and licensed activity, create a new process by which you will organize the background data tasks.

Step 1: Add Process

1. In the Web Central application, use the Process Navigator to navigate to the System Administration > Add-In Manager process.
2. Click on the task called "View Tasks by Process and Activity."
3. Select the "AbSystemAdministration" activity.



4. Click the "Add New" button on the Processes panel.
5. Enter details for the new Process.
6. Click the "Save" button on the Edit Process Details panel.



Step 2: Add Tasks for Labels and Spaces

1. In the Web Central application, use the Process Navigator to navigate to the System Administration > Add-In Manager process.
2. Click on the task called “View Tasks by Process and Activity.”
3. Select the “AbSystemAdministration” activity.
4. Select the Process created in Step 1.
5. Click the “Add New” button on the Process Tasks panel.
6. Enter details for a Label.
7. Click the “Save” button on the Edit Tasks Details panel.

8. Click the “Add New” button on the Process Tasks panel.
9. Enter details for a space.
10. Click the “Save” button on the Edit Tasks Details panel.

11. Repeat steps 5-10 as often as necessary.

Process Tasks		Add New PDF XLS		
		Activity	Process or Role	Task
Edit	Delete	AbSystemAdministration	BackgroundData	Space Background Data
Edit	Delete	AbSystemAdministration	BackgroundData	-
Edit	Delete	AbSystemAdministration	BackgroundData	Asset Background Data
Edit	Delete	AbSystemAdministration	BackgroundData	--
Edit	Delete	AbSystemAdministration	BackgroundData	Operations Background Data
Edit	Delete	AbSystemAdministration	BackgroundData	---
Edit	Delete	AbSystemAdministration	BackgroundData	Real Estate Background Data

ARCHIBUS System Administration
Background Data
Tasks:
Space Background Data
Asset Background Data
Operations Background Data
Real Estate Background Data

Step 3: Add Tasks for Views

1. In the Web Central application, use the Process Navigator to navigate to the System Administration > Add-In Manager process.
2. Click on the task called “View Tasks by Process and Activity.”
3. Select the “AbSystemAdministration” activity.
4. Select the Process created in Step 1.
5. Click the “Add New” button on the Process Tasks panel.
6. Enter details for the views to be included on the Navigator.
7. Click the “Save” button on the Edit Tasks Details panel for each view.

Step 4: Assign Processes to Users

After creating the process, users must be assigned to the process to view it. Please review the Security document for details on assigning processes to users.

Review Questions: Activities, Processes, & Tasks

- 1.) The Process Navigator and Dashboards are defined by what data tables
 - A. *Domains, Activities, and Users.*
 - B. *Activities, Processes, and Process Tasks.*
 - C. *Domains, Modules, and Processes.*
 - D. *Roles, Users, and Processes.*

- 2.) If a newly created process does not appear on the Process Navigator, what field might be the cause?
 - A. *Display Order.*
 - B. *Help Link.*
 - C. *Data Transfer Status.*
 - D. *Active?*

- 3.) What does the Display Order field in the activities, processes, and process tasks tables do?
 - A. *It determines the order that an item will appear on the Process Navigator.*
 - B. *It differentiates labels from views by using different numeric ranges for each.*
 - C. *It determines whether tasks will be displayed in Web Central or the Smart Client, etc.*
 - D. *It determines whether tasks will be displayed as processes, dashboards, or My Favorites.*

- 4.) Users can define their own help text for their customized views?
 - A. *True.*
 - B. *False.*

- 5.) What field in the Process Task table determines whether a view will be on a My Favorites menu?
 - A. *Task Action.*
 - B. *Task Type.*
 - C. *Is a Hotlist Task?*
 - D. *Internal Use 1.*

- 6.) What is the correct way to specify a space on the Process Navigator?
 - A. *Define Task Type as "Space" and Task as "Space."*
 - B. *Define Task Type as "Space" and Task as "-."*
 - C. *Define Task Type as "Label" and Task as "-."*
 - D. *Define Task Type as "Label" and Task as "Space."*

- 7.) Which of the below task definitions describes a task that will successfully appear on a Process Navigator?
 - A. *Activity is Active, Process Type = Web Dashboard, Task Type = Web URL, Task File suffix = .axvw*
 - B. *Activity is Active, Process Type = Web PNav, Task Type = Web URL, Task File suffix = .axvw*
 - C. *Activity is Active, Process Type = Web PNav, Task Type = Web PNav, Task File suffix = .avw*
 - D. *Activity is Active, Process Type = Web PNav, Task Type = Web URL, Task File suffix = .avw*

- 8.) Which field in the process task table differentiates a Smart Client from a Web Central view?
 - A. *Task File (Smart Client and Web Central views have different file extensions).*
 - B. *Task Type (Each application has its own task type).*
 - C. *Hotlist Security Group (Each application is assigned its own security group).*
 - D. *License Level (Tasks are assigned to applications based on the user License Level).*

Appendix: Navigation: Activities, Processes & Tasks

Contents:

- Appendix Exercises
- Review Solutions

Further Reading:

For a better understanding of Activities, Processes, and Tasks, users should research the following topics using the ARCHIBUS System Management Help text:

- [Personalizing the Process Navigator](#)



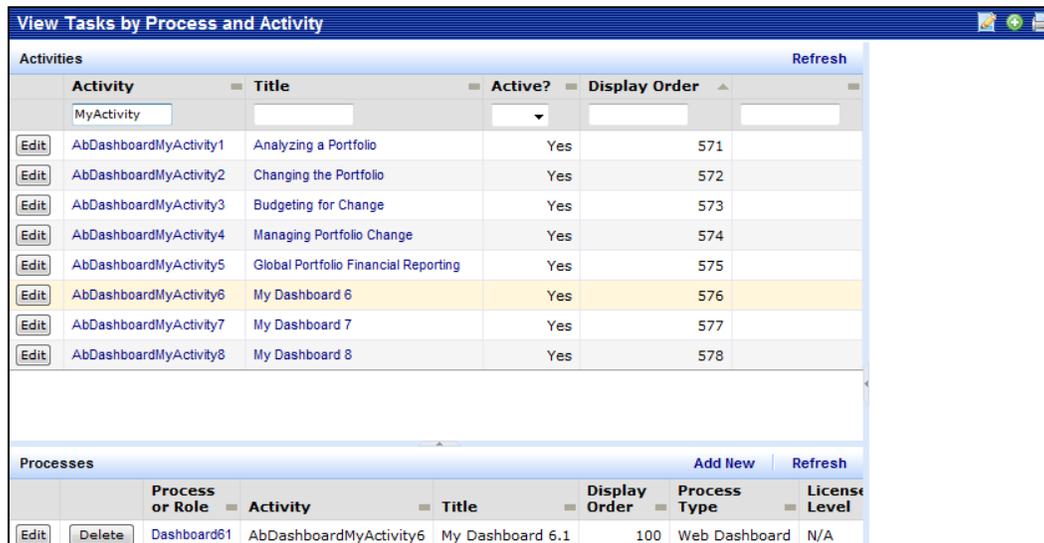
Contents	
Welcome	
Acknowledgements	
What's New in Version 19.1	
Installation	
System Administrator	
ARCHIBUS Administrator	
Overview	
Essential Application Security	
Advanced Application Security	
Personalizing the Process Navigator	
Overview	
The Process Navigator Tables	
Editing the Entireties on the Process Navigator	
Personalizing the Presentation of Data	
Administering Document Management	
Configuring Workflow Rules	
Database Administrator	
Add-In Manager	
System Integrator	
Software Engineer	
Localization Coordinator	

Exercise 8223: Add Dashboard Processes

Managerial, and even executive-level, members of the organizations are beginning to realize that a lot of the data related to infrastructure, the #2 expense on their balance sheet, is available over the web. While these members barely have time normally to even look at an application, you realize you can make getting at their data as easy as clicking on a desktop icon. As an Administrator, you decide to create multiple dashboards for different users in management and in the executive branch. While you can create new dashboard processes automatically with the Dashboard Definition Wizard, you decide to layout the dashboards first. Create dashboard processes to which you can assign dashboards.

Step 1: Add Process

1. In the Web Central application, use the Process Navigator to navigate to the System Administration > Add-In Manager process.
2. Click on the task called “View Tasks by Process and Activity.”
3. Filter the list of activities by “MyActivities” and make all activities set to Active. (The “AbDashboardMyActivity” dashboards were included in the product for non-domain specific dashboards.)
4. Select an Activity to start adding dashboard processes.



The screenshot shows the 'View Tasks by Process and Activity' window. It has two main sections: 'Activities' and 'Processes'.

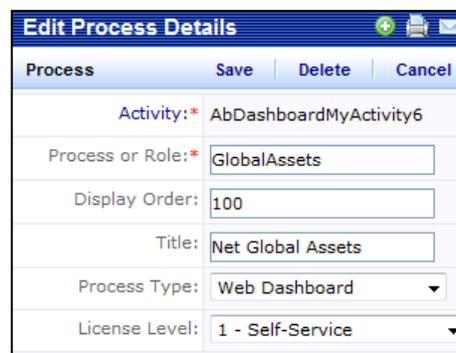
Activities Section:

Activity	Title	Active?	Display Order
MyActivity			
AbDashboardMyActivity1	Analyzing a Portfolio	Yes	571
AbDashboardMyActivity2	Changing the Portfolio	Yes	572
AbDashboardMyActivity3	Budgeting for Change	Yes	573
AbDashboardMyActivity4	Managing Portfolio Change	Yes	574
AbDashboardMyActivity5	Global Portfolio Financial Reporting	Yes	575
AbDashboardMyActivity6	My Dashboard 6	Yes	576
AbDashboardMyActivity7	My Dashboard 7	Yes	577
AbDashboardMyActivity8	My Dashboard 8	Yes	578

Processes Section:

Process or Role	Activity	Title	Display Order	Process Type	License Level
Dashboard01	AbDashboardMyActivity6	My Dashboard 6.1	100	Web Dashboard	N/A

5. Click the “Add New” button on the Processes panel.
6. Enter a Process, Display Order, and Title for the new process. Set the Process Type to “Web Dashboard” and the license level to “1 – Self Service.”
7. Click the “Save” button on the Edit Process Details panel.



The screenshot shows the 'Edit Process Details' window with the following fields:

- Activity: AbDashboardMyActivity6
- Process or Role: GlobalAssets
- Display Order: 100
- Title: Net Global Assets
- Process Type: Web Dashboard
- License Level: 1 - Self-Service

Step 2: Add Tasks for Views

1. In the Web Central application, use the Process Navigator to navigate to the System Administration > Add-In Manager process.
2. Click on the task called “View Tasks by Process and Activity.”
3. Select the “AbSystemAdministration” activity.
4. Select the Process created in Step 1.
5. Click the “Add New” button on the Process Tasks panel.
6. Enter details for the dashboard view to be included on the Navigator.
7. Click the “Save” button on the Edit Tasks Details panel for each view.

Step 3: Assign Processes to Users

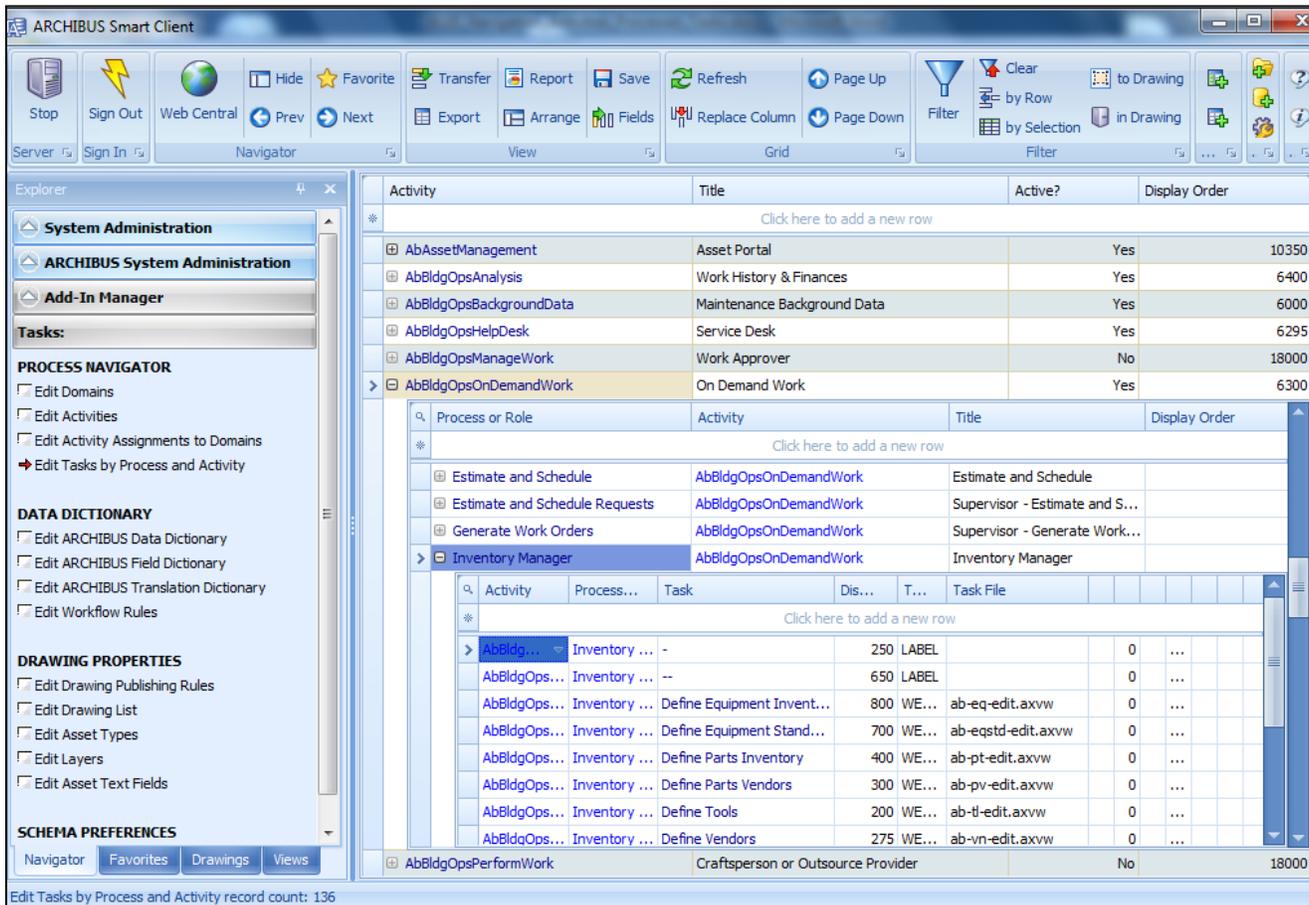
After creating the process, users must be assigned to the process to view it. Please review the Security document for details on assigning processes to users.

Exercise 8224: View Tasks by Process & Activity with Smart Client

If you prefer to use the Smart Client for working with Domains, Processes, and Tasks, you can perform all the same functionality on one screen.

Step 1: View Tasks by Process and Activity

1. In the Smart Client application, use the Process Navigator to navigate to the System Administration > Add-In Manager process.
2. Click on the task called “Edit Tasks by Process and Activity.”
3. Use the task to do all the same things you did with the “View Domains” and “View Tasks by Process and Activity.”



Review Solutions: Activities, Processes, & Tasks

- 1.) The Process Navigator and Dashboards are defined by what data tables
 - A. *Domains, Activities, and Users.*
 - B. *Activities, Processes, and Process Tasks.***
 - C. *Domains, Modules, and Processes.*
 - D. *Roles, Users, and Processes.*

- 2.) If a newly created process does not appear on the Process Navigator, what field might be the cause?
 - A. *Display Order.*
 - B. *Help Link.*
 - C. *Data Transfer Status.*
 - D. *Active?***

- 3.) What does the Display Order field in the activities, processes, and process tasks tables do?
 - A. *It determines the order that an item will appear on the Process Navigator.***
 - B. *It differentiates labels from views by using different numeric ranges for each.*
 - C. *It determines whether tasks will be displayed in Web Central or the Smart Client, etc.*
 - D. *It determines whether tasks will be displayed as processes, dashboards, or My Favorites.*

- 4.) Users can define their own help text for their customized views?
 - A. *True.***
 - B. *False.*

- 5.) What field in the Process Task table determines whether a view will be on a My Favorites menu?
 - A. *Task Action.*
 - B. *Task Type.*
 - C. *Is a Hotlist Task?***
 - D. *Internal Use 1.*

- 6.) What is the correct way to specify a space on the Process Navigator?
 - A. *Define Task Type as "Space" and Task as "Space."*
 - B. *Define Task Type as "Space" and Task as "-."*
 - C. *Define Task Type as "Label" and Task as "-."***
 - D. *Define Task Type as "Label" and Task as "Space."*

- 7.) Which of the below task definitions describes a task that will successfully appear on a Process Navigator?
 - A. *Activity is Active, Process Type = Web Dashboard, Task Type = Web URL, Task File suffix = .axvw*
 - B. *Activity is Active, Process Type = Web PNav, Task Type = Web URL, Task File suffix = .axvw***
 - C. *Activity is Active, Process Type = Web PNav, Task Type = Web PNav, Task File suffix = .avw*
 - D. *Activity is Active, Process Type = Web PNav, Task Type = Web URL, Task File suffix = .avw*

- 8.) Which field in the process task table differentiates a Smart Client from a Web Central view?
 - A. *Task File (Smart Client and Web Central views have different file extensions).*
 - B. *Task Type (Each application has its own task type).***
 - C. *Hotlist Security Group (Each application is assigned its own security group).*
 - D. *License Level (Tasks are assigned to applications based on the user License Level).*