OnBase®

Foundation EP5

StatusView

Reference Guide

Includes:

Installation Guide

Administration Guide

User Guide

Foundation EP5

Copyright

Document Name .... StatusView

Department/Group .... Documentation

Revision Number .... Foundation EP5

OVERVIEW

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Overview

StatusView allows you, as an administrator or user, to configure a screen to display all of the information in OnBase that you typically need to see regularly. Using StatusView to display information that is needed throughout a work day can drastically reduce the time it takes to access certain OnBase features and the time to retrieve documents.

StatusView provides flexibility. It allows you to create a view, or layout, for every job function you perform. This can be created on an individual basis or by department. Using StatusView, administrators and users alike can create custom web interfaces for viewing OnBase content.

StatusView also is efficient. Users do not have to perform searches within the standard interface. StatusView allows for results to be automatically displayed upon log in.

Licensing

Beginning in OnBase Foundation EP5, new customers must use simplified licensing to access StatusView functionality. Existing customers upgrading from a version of OnBase prior to OnBase Foundation EP5 can continue to use legacy licensing to access this functionality.

If you are a new customer as of OnBase Foundation EP5 or greater, see Simplified Licensing on page 1.

If you are upgrading from a version of OnBase prior to OnBase Foundation EP5, see Legacy Licensing on page 1.

Simplified Licensing

The Essential User, Standard User, or Premier User license is required.

Some portlets are based on modules which require additional licensing. To use a portlet for a specific module, your system must be licensed for the module. For the licensing requirements of an additional module, see the documentation for that module.

Legacy Licensing

StatusView requires the following licenses:

- Web Server
- StatusView
- Client

Some portlets are based on modules which require additional licensing. To use a portlet for a specific module, your system must be licensed for the module. For the licensing requirements of an additional module, see the documentation for that module.

Check your current licensing status by selecting **Utils** | **Product Licenses** from the Configuration module.

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Requirements

The following sections outline requirement information specific to StatusView in OnBase Foundation EP5.

General Requirements

For general requirement information that applies to StatusView and other modules, see the sections on the following topics in the **Installation Requirements** manual:

- Miscellaneous requirements

Web Server Requirements

StatusView is part of the Web Client; therefore, it requires Core Services and a functioning Web Server.

The Web Server must be able to request and access StatusView web pages. Ensure that you can retrieve StatusView web pages from the Web Server that is hosting OnBase.

See the **Web Server** module reference guide for Web Server requirements.

Licensing

See Licensing on page 1 for licensing requirements.

Installation

First, install the Web Server as described in the **Web Server** module reference guide. Once the Web Server is installed, continue to the following procedures:

- Translations on page 4
- User Group Configuration on page 5
- StatusView Web.config Settings on page 5

Translations

The first time StatusView is accessed, the Application Server creates a set of default portlet types. The names of these portlet types are translated according to the locale set on the client workstation that first accesses StatusView.

As a best practice, an administrator should access StatusView first to ensure the default portlet type names are translated in the correct primary language. For multi-language environments, create copies of the portlet types and rename them in the required secondary languages.

The names of individual portlets, Document Types, Workflow queues, and other OnBase objects are user-configured. StatusView does not translate these objects for different locales.

User Group Configuration

To administer StatusView privileges, at least one user must be granted the **StatusView User Management** Product Right.

1. Log on to OnBase Configuration.
2. Select **Users | User Groups/Rights**.
3. Select the User Group whose members will administer StatusView privileges to other users.
4. Click **Product Rights**. The **Assigning Product Rights** dialog box is displayed.
5. Under **Administrative Privileges**, select the **StatusView User Management**. The **StatusView User Management** Product Right designates users as StatusView Rights Administrators.

Note: User Groups granted the **StatusView User Management** Product Right are able to configure which User Groups may configure Personal Layout Configurations, Group Layout Configurations, and Portlet Registrations for every User Group.

6. Assign sufficient StatusView privileges to users who will administer or access StatusView. For information about assigning privileges, see Privilege Configuration on page 10.

StatusView Web.config Settings

Once the Web Server is installed, its Web.config file requires no modification for StatusView; the StatusView context and modes are enabled by default. To check whether StatusView is enabled, see the following topic.

Ensuring StatusView is Enabled

The following steps outline the Web Server Web.config settings you can check to ensure StatusView is enabled:

1. Ensure the following setting is set to true to make the StatusView context available from the OnBase Web Client:

```
<ContextInfo>
<name><![CDATA[StatusView]]></name>
<displayName><![CDATA[StatusView]]></displayName>
<displayOrder>5</displayOrder>
```

```
<icon><![CDATA[NavPanel/StatusView_16x16.png]]></icon>
<enabled>True</enabled>
</ContextInfo>
```

2. Ensure the following setting is set to true to enable the **My Layouts** option:

```
<ControlBar>
<name><![CDATA[MyLayouts]]></name>
<displayName><![CDATA[MyLayouts]]></displayName>
<path><![CDATA[./StatusView/MyLayouts.aspx]]></path>
<icon><![CDATA[NavPanel/My_Views_16x16.png]]></icon>
<enabled>True</enabled>
</ControlBar>
```

Accommodating Very Large Folder & Workflow Solutions

When you save the configuration for folder or Workflow portlets, you may encounter one of the following errors:

- Operation is not valid due to the current status of the object.
- Message: Error during serialization or deserialization using the JSON JavaScriptSerializer. The length of the string exceeds the value set on the maxJsonLength property. Parameter name: input.

These errors typically occur if the folder or Workflow portlet configuration dialog box contains a very large number of folders or queues.

As a best practice, if your system has a very large number of folders and queues, perform portlet configuration using an account with privileges to fewer folders or queues. Doing so should prevent the errors and also make it easier to find the folders or queues you want to display in the portlet.

If using a different user account is not an option, then increase the **aspnet:MaxJsonDeserializerMembers** setting in the Web Server's Web.config file.

- If you are configuring a folder portlet, ensure the setting's value exceeds the total number of folders in your system.
- If you are configuring a Workflow portlet, ensure the setting's value exceeds the total number of Workflow life cycles and queues in your system.

If you expect your folder or Workflow solution to continue to grow, then you may need to increase the value further to accommodate the expected growth.

Troubleshooting

For troubleshooting information, see the following topics:

- Error during serialization or deserialization on page 7
- Request format is unrecognized for URL on page 7
- Unable to find script library on page 7

Error during serialization or deserialization

When you attempt to save a folder or Workflow portlet configuration on a system with a large number of folders or Workflow queues, you may encounter one of the following errors:

- Operation is not valid due to the current status of the object.
- Message: Error during serialization or deserialization using the JSON JavaScriptSerializer. The length of the string exceeds the value set on the maxJsonLength property. Parameter name: input.

When you close the error dialog box, the configuration dialog box may become unresponsive.

To address this issue, see Accommodating Very Large Folder & Workflow Solutions on page 6.

Request format is unrecognized for URL

If you cannot add a portlet to a layout, the following message may be logged to the **Errors** tab of the Diagnostics Console:

- Request format is unrecognized for URL unexpectedly ending in '/js'.

To resolve this issue, perform the following steps on both the Web Server and Application Server:

1. Open a Command Prompt.
2. Type the following and press **ENTER**:
   cd %windir%\Microsoft.NET\Framework\v4.0.30319
3. Type the following and press **ENTER**:
   aspnet_regiis -c
4. Type the following and press **ENTER**:
   aspnet_regiis -ir

Unable to find script library

When you attempt to create a layout, the message “Unable to find script library” may be displayed. To resolve this issue, install the client-side scripts for ASP.NET to the aspnet_client subdirectory of each IIS site directory.

1. Open a command prompt.
2. From %windir%\Microsoft.NET\Framework\v4.0.30319, run the following command: aspnet_regiis -c

Contacting Support

When contacting your solution provider, please provide the following information:

- The OnBase module where the issue was encountered.
- The OnBase version and build.

- The type and version of the connected database, such as Microsoft SQL Server 2014 or Oracle 12c, and any Service Pack that has been installed.
- The operating system that the workstation is running on, such as Windows 10 or Windows Server 2012 R2, and any Service Pack that has been installed. Check the supported operating systems for this module to ensure that the operating system is supported.
- The name and version of any application related to the issue.
- The version of Internet Explorer and any Service Pack that has been installed, if applicable.
- A complete description of the problem, including actions leading up to the issue.
- Screenshots of any error messages.

Supplied with the above information, your solution provider can better assist you in correcting the issue.

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Configuration

Overview

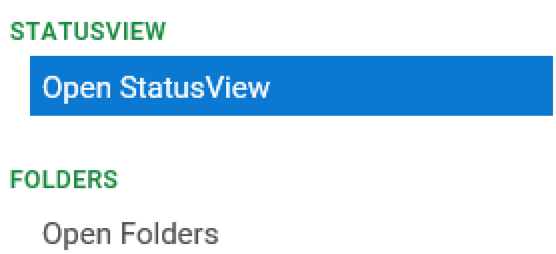
StatusView configuration includes the following procedures:

- Privilege Configuration on page 10
- Portlet Type Administration on page 21
- Layout Configuration on page 24
- Portlet Contents Configuration on page 49

Accessing StatusView

To access StatusView:

1. Log on to the OnBase Web Client.
2. Select **Open StatusView** from the **Main Menu** list in the OnBase Web Client.



3. The StatusView interface is displayed.

Privilege Configuration

The following topics describe how to assign users privileges to configure and access portlets and layouts.

- Assigning Configuration Privileges on page 11
- Assigning Portlet Privileges on page 12
- Assigning Layout Access on page 17

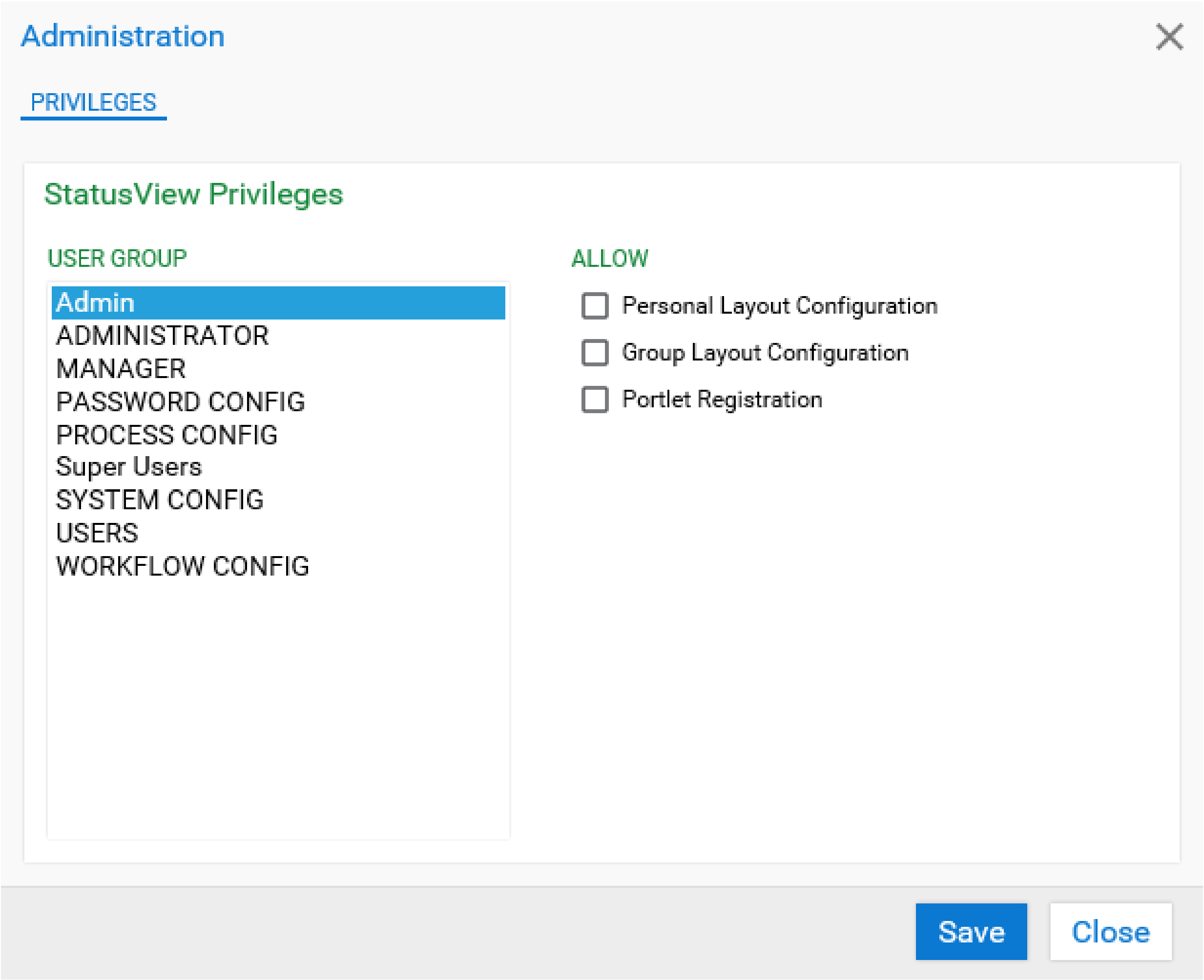
Assigning Configuration Privileges

Assigning StatusView privileges can be done in StatusView or in the Configuration module. In StatusView, privileges are assigned in the **Administration** dialog. For more information about assigning StatusView privileges in the Configuration module, see the **System Administration** module reference guide.

To access the **Administration** dialog and assign privileges:

Note: To have access to the **Privileges** tab, you must be granted the **StatusView User Management** Product Right in OnBase Configuration.

1. In StatusView, click **Administration.** The **Administration** dialog is displayed.



2. Select a user group to assign privileges to.
   If the user group's name exceeds the width of the select list, rest your pointer over the name to display the entire text.

3. Select the appropriate privileges, which are described in the following table:

Privilege	Description
Personal Layout Configuration	Allows users to configure a personal layout.
Group Layout Configuration	Allows users to configure layouts and layout privileges for user groups. As a best practice, limit the number of users who have this privilege. Users with the **Group Layout Configuration** privilege can reconfigure portlets in any group layout that they have access to, even if those layouts have been configured by other users.
Portlet Registration	Allows users to assign portlet privileges. When assigned with one of the above layout configuration privileges, the **Portlet Registration** privilege allows users to copy, rename, and delete portlet types. **Note:** Only copies of portlet types can be deleted. The default portlet types cannot be deleted.

4. Click **Save**. A confirmation message is displayed.
5. Click **OK**.
6. Click **Close** to close the dialog.

Assigning Portlet Privileges

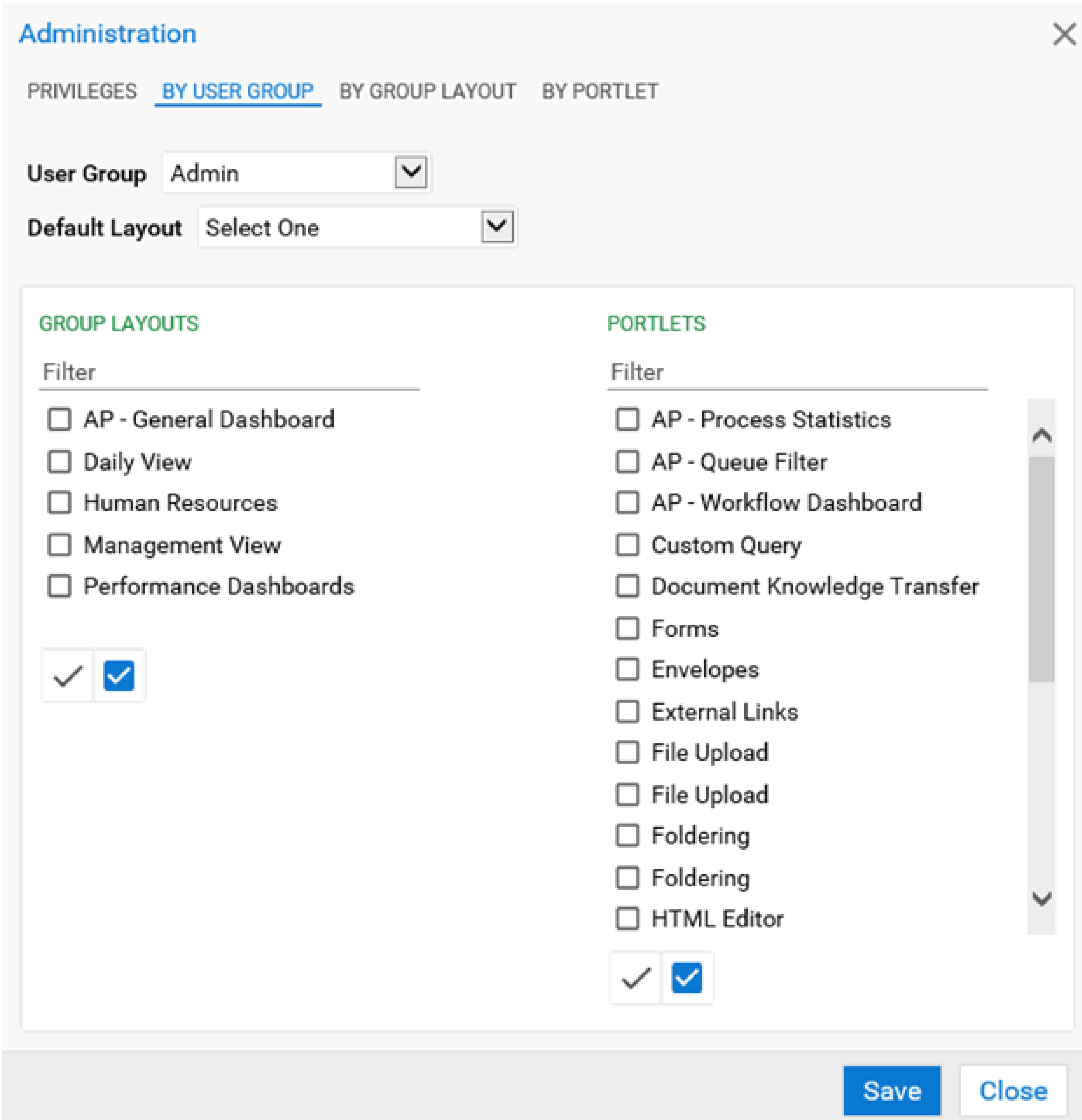
To be able to add portlets to a layout, a user group must be assigned privileges to the portlet types. Portlet privileges are not required for viewing portlets within a layout.

Note: On systems concurrently running multiple versions of OnBase, some OnBase versions may include portlets that are not available in earlier versions. A portlet is available only within the OnBase versions where the portlet is supported. Within the earlier versions, you can assign privileges to the portlet using the Administration pane, but the portlet will not be available for layout configuration, and the portlet will not be displayed in existing layouts where it has been added using a newer OnBase version.

By User Group

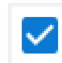
To assign portlet privileges by user group:

1. In StatusView, click **Administration**. The **Administration** dialog is displayed.

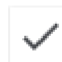


2. If necessary, click **By User Group** to assign privileges by user group.
3. Select a user group from the **User Group** drop-down.
4. You can select a layout to be the Default Layout for that user group in the **Default Layout** drop-down.

5. Select the appropriate portlet(s) from the **Portlets** list by selecting the check box next to each portlet.
6. To add all portlets, click the **Select All** button.



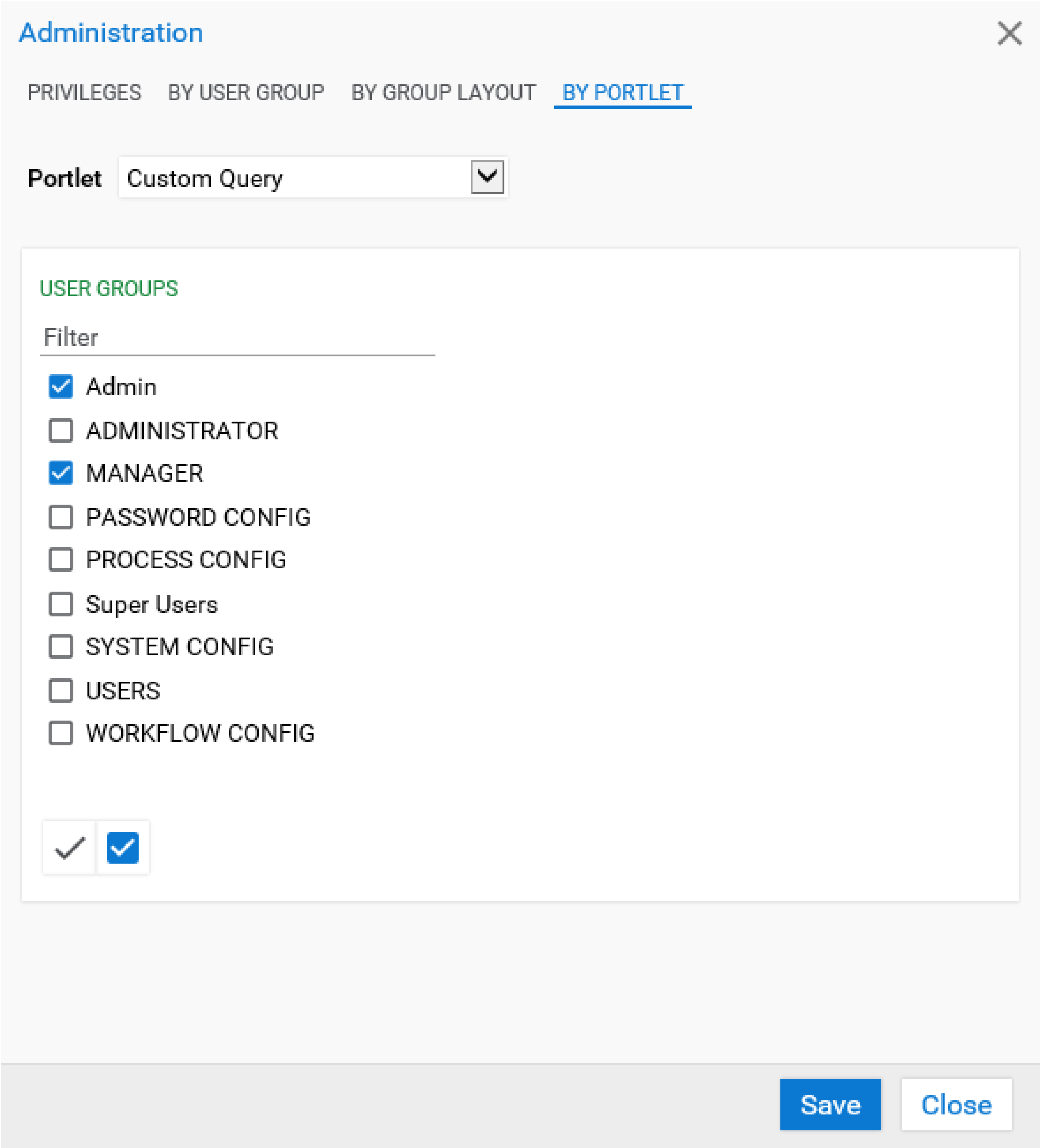
7. After all of the appropriate portlets are added, click the **Save** button.
8. To remove portlets, deselect the check box next to a portlet or remove all the portlets by clicking the **Clear Selected** button.



By Portlet

Follow these steps to assign portlet privileges by portlet type.

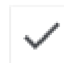
1. Select **Administration** from the mode drop-down list.
2. Click **By Portlet**.



3. Select a portlet type from the **Portlet** drop-down.
4. Select the user group(s) who should have privileges to the selected portlet type by selecting the check box next to each user group.

5. If you want to give privileges for the selected portlet to all user groups, click the **Select All** button.

6. If you to remove privileges for the selected portlet from all user groups, click the **Clear Selected** button.



7. When finished, click **Save**.

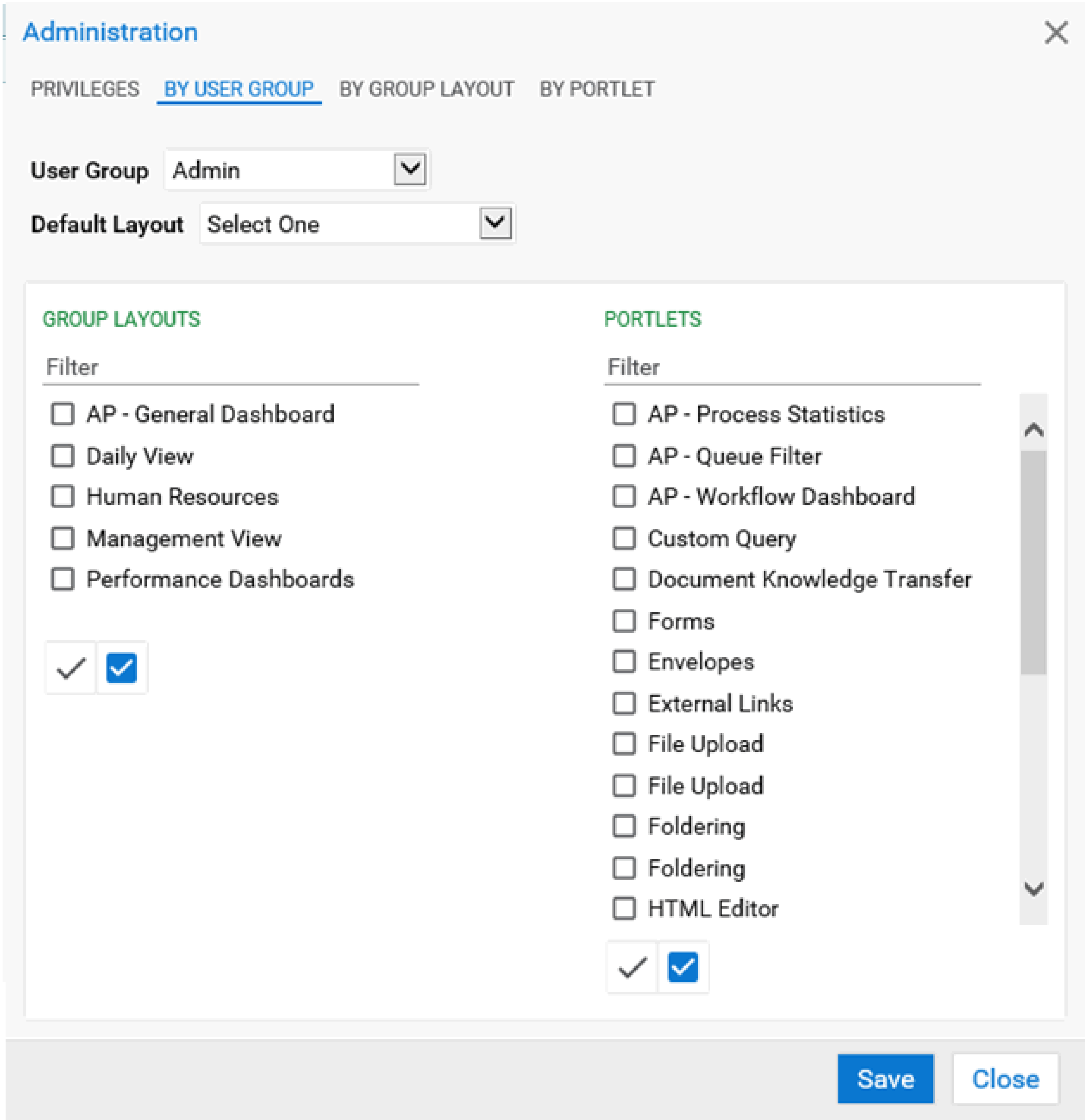
Assigning Layout Access

Once created, group layouts must be assigned the appropriate user groups. To create a layout, see Creating Layouts on page 25.

By User Group

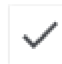
To assign group layouts by user group:

1. In StatusView, click **Administration**. The **Administration** dialog is displayed.



2. Click **By User Group**, if necessary.
3. Select a user group from the **User Group** drop-down.
4. Select the appropriate layout(s) from the **Group Layouts** list by selecting the check box next to each layout.
5. If you want to add all layouts, click the **Select All** button.

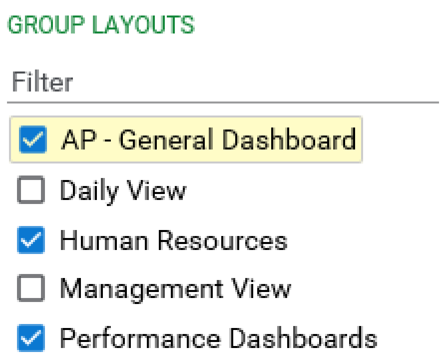
6. If you want to remove all layouts, click the **Clear Selected** button.



7. After the appropriate layouts are added, click **Save**.

Setting a Default Layout

The default layout is the layout that a user group sees upon accessing StatusView. To specify a layout as the default, select it from the **Default Layout** drop-down list. The default layout is highlighted in the **Group Layouts** list.



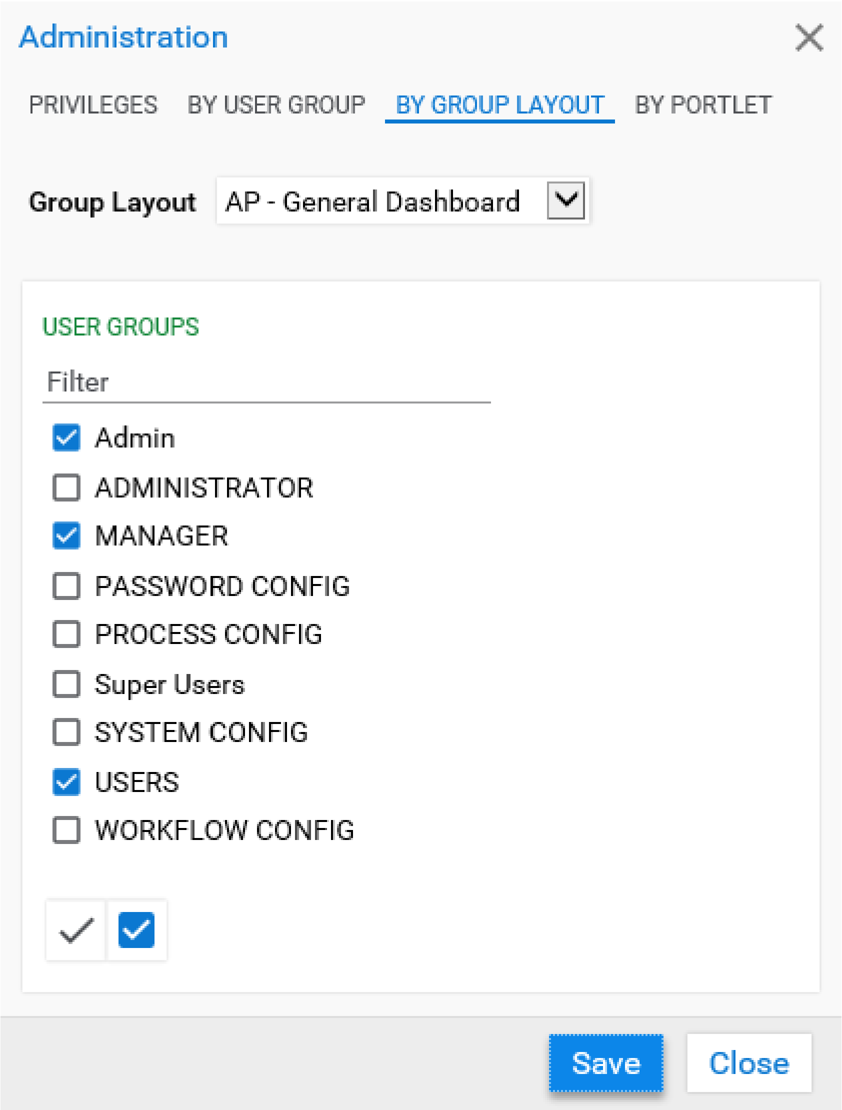
Note: If a user belongs to multiple user groups that have different default layouts, the default layout of the first user group listed that the user belongs to is used as the default layout for that user.

Note: If defined, a user's default personal layout takes precedence over the user's default group layout.

By Group Layout

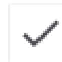
Follow these steps to assign group layout privileges by layout.

1. In StatusView, click **Administration**. The **Administration** dialog is displayed.
2. Click **By Group Layout** to assign privileges by layout, if necessary.



3. Select a layout from the **Group Layout** drop-down.
4. Select the user group(s) who should have rights to the selected layout by selecting the check box next to each user group.
5. If you want to add all layouts, click the **Select All** button.

6. If you want to remove all layouts, click the **Clear Selected** button.

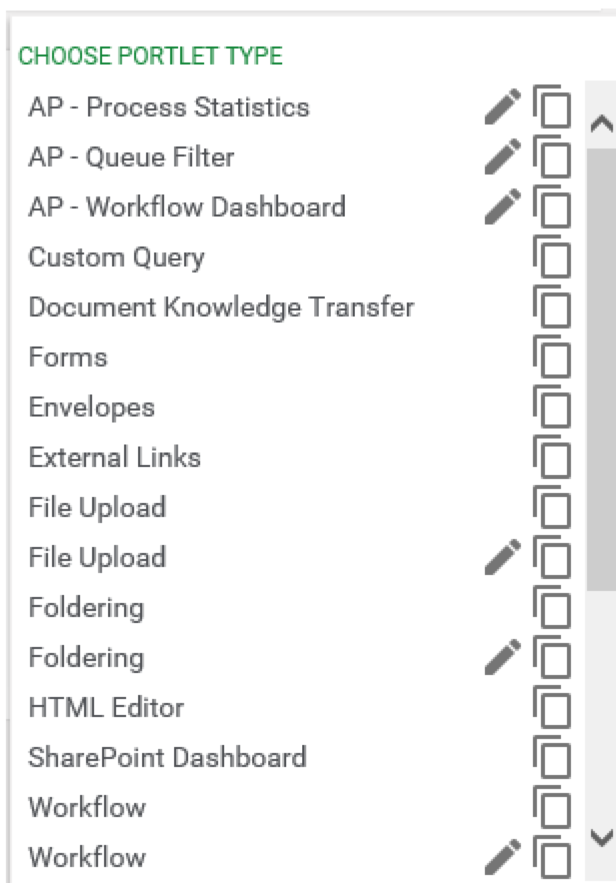


7. After the appropriate layouts are added, click **Save**.

Portlet Type Administration

If you have sufficient privileges, StatusView allows you to copy, rename, and remove portlet types as needed. To perform portlet type administration, click the **Add Portlet** button.

The **Choose Portlet Type** dialog is displayed.



Proceed to the following topics:

- Copying a Portlet Type on page 22
- Renaming a Portlet Type on page 23
- Deleting a Portlet Type on page 24

Copying a Portlet Type

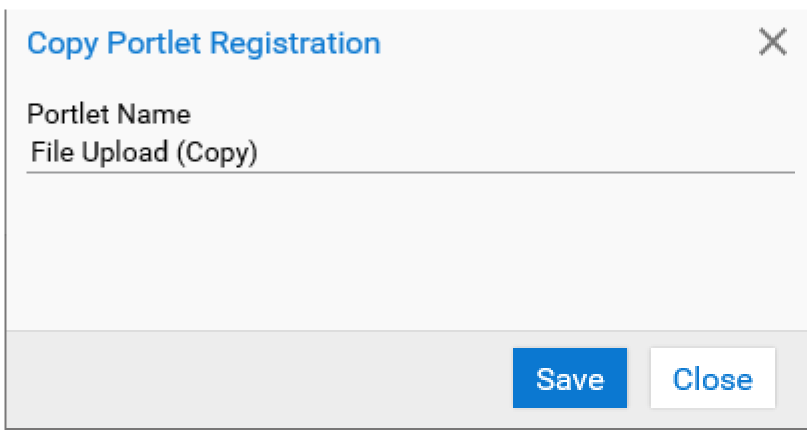
StatusView allows you to create multiple copies of the portlet type as needed. For example, you may want to copy and rename certain portlet types for a specific user group.

Note: You do not need to copy a portlet type in order to place multiple instances of a portlet type on a page. You can add the same portlet type to a page multiple times.

1. In StatusView, click the **Add Portlet** button.

2. Click the **Copy Portlet Registration** button next to the portlet that you want to copy.

3. Click **Copy Portlet Registration** dialog is displayed.



   The new copy's name matches the original portlet type's, except it is followed by **(Copy)**.

4. If you want to change the name, click in the **Portlet Name** field and edit the name.
5. When finished, click **Save** to copy the portlet, or click **Close** to close the dialog without copying the portlet.

Renaming a Portlet Type

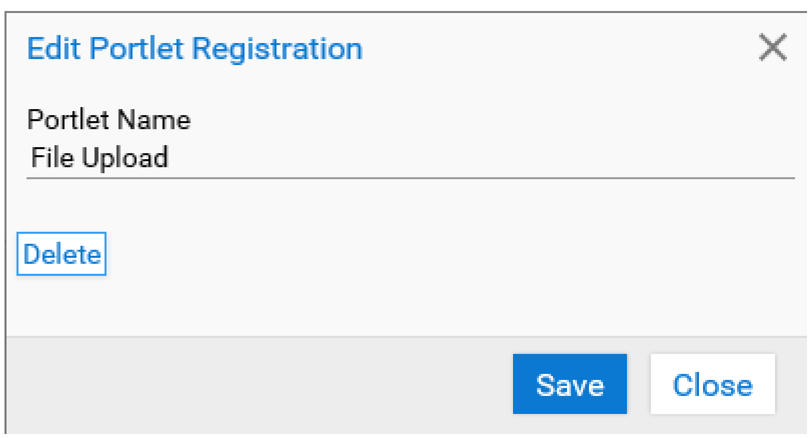
Use the **Edit Portlet Registration** button to change a copied portlet type's name to something more meaningful for users. For example, if two user groups will work with a portlet type, but they use different names for the portlet type's functionality, you may want to copy and rename the portlet type for each group. This change does not affect the names of existing portlets within a layout.

Note: The first time StatusView is accessed, the Application Server creates a set of default portlet types. These portlet types' names are translated according to the locale set on client workstation that first accesses StatusView. The default portlet types cannot be renamed.

1. In StatusView, click the **Add Portlet** button.

2. Click the **Edit Portlet Registration** button next to the portlet that you want to rename.

3. The **Edit Portlet Registration** dialog is displayed.



4. Enter in the new desired name in the **Portlet Name** field.
5. Click **Save**. The portlet type is updated with the new name.

Deleting a Portlet Type

Before deleting a portlet type, first ensure the portlet type is not used in any existing layouts or in the OnBase Web Parts for Microsoft SharePoint integration.

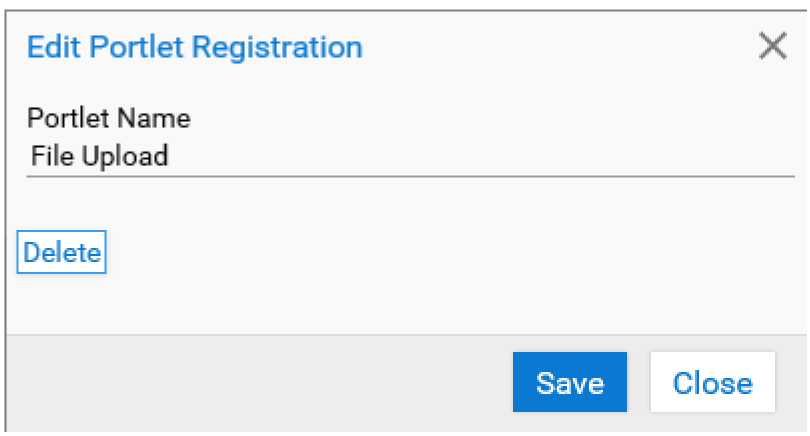
Follow these steps to delete an unnecessary copy of a portlet type.

Note: Only copies of portlet types can be deleted. You cannot delete a default portlet type.

1. In StatusView, click the **Add Portlet** button.

2. Click the **Edit Portlet Registration** button next to the portlet that you want to delete.

3. The **Edit Portlet Registration** dialog is displayed.



4. Click **Delete**. The selected copy is deleted.

Layout Configuration

Layouts are an arrangement of portlets that allow users to monitor and access different parts of OnBase from within a single screen.

Layouts can be created for user groups or as personal layouts.

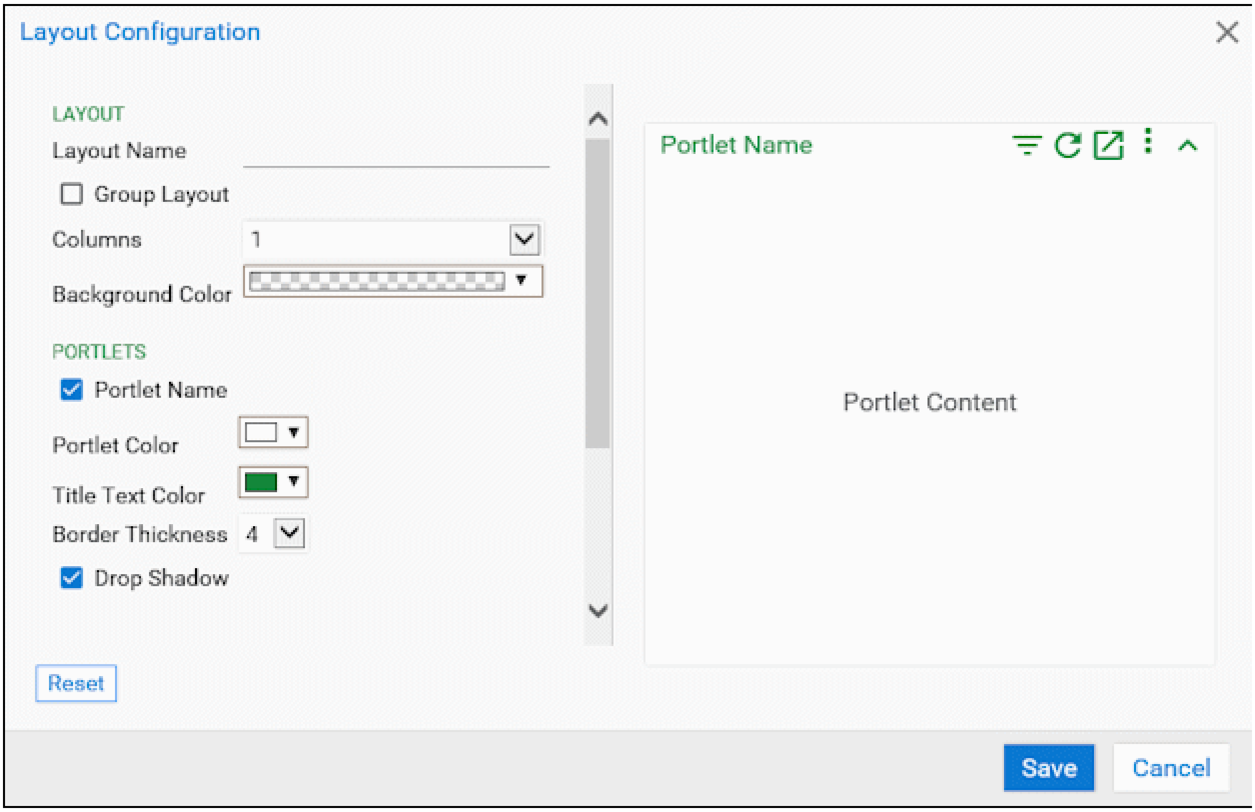
- **Group layouts** can be modified only at the user group level and can be configured only by users with the **Group Layout Configuration** privilege or by the user who originally created the layout.
- **Personal layouts** are configured by a user and are available to that user only. The user must have the **Personal Layout Configuration** privilege.

The following topics describe how to create and configure StatusView layouts.

Creating Layouts

To create a new layout:

1. To create a new layout, in StatusView, click **Create Layout**. The **Layout Configuration** dialog is displayed.



2. Under the **Layout** section, type a name for the layout in the **Layout Name** field.

3. If you want the layout to be a Group Layout that will be shared with one or more User Groups, select the **Group Layout** option.

Note: If the **Group Layout** option is not selected, the layout will be a Personal Layout that is for personal use and is unavailable to any other users.

4. In the **Columns** drop-down, select **1**, **2**, or **3** to specify the number of columns the layout should have.
5. If you want to change the visual appearance of the layout, see Editing Visuals for a Layout on page 27.
6. Click **Save** to save the new layout. The **Layout Configuration** dialog is closed, and the new layout is displayed.

   If you created a new group layout, the layout's title bar is marked with the following icon to indicate that no user groups have privileges to the layout. Until you assign a user group privileges to the layout, the layout is available only to you.

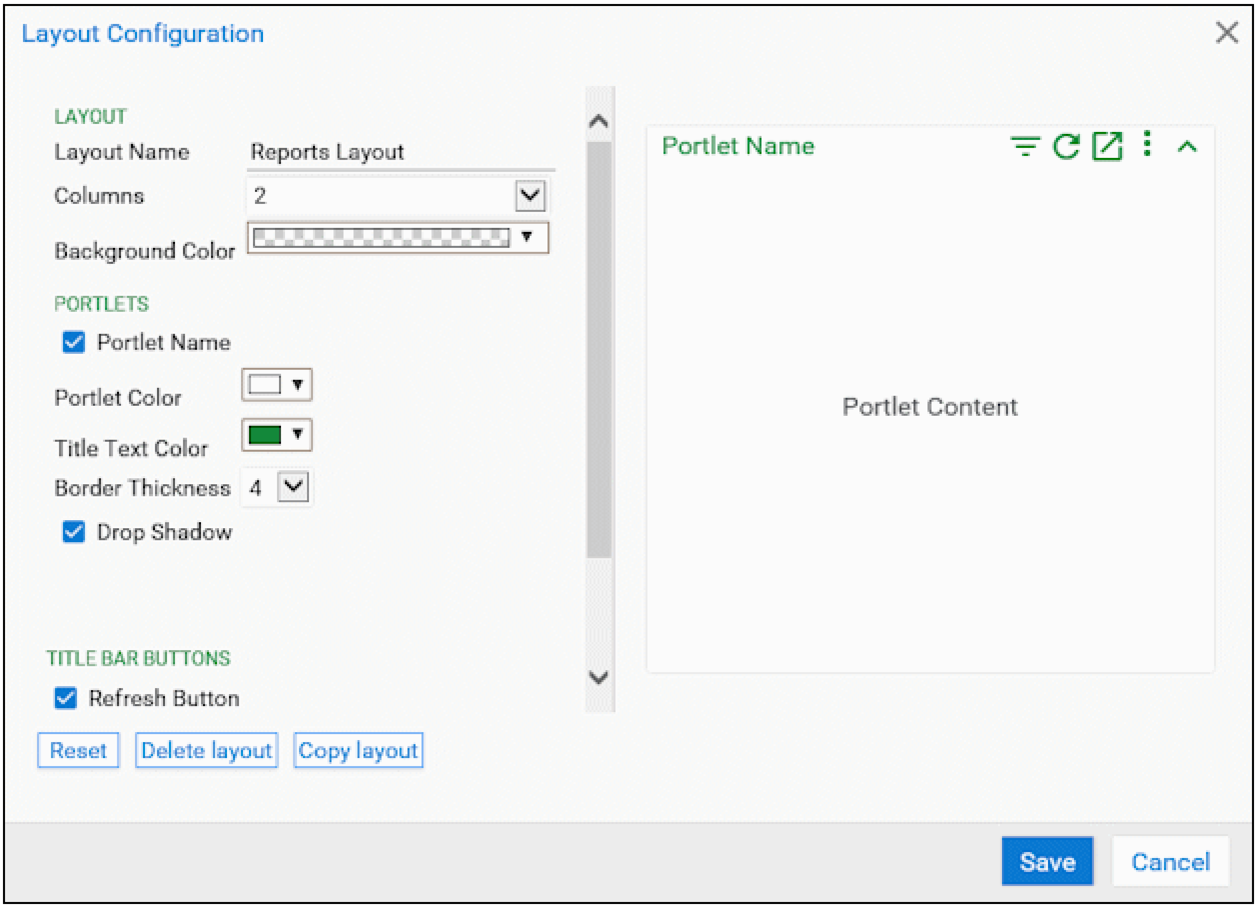
7. See Adding, Removing, and Arranging Portlets in a Layout on page 35 to add portlets to the layout.

Configuring an Existing Layout

If you have sufficient layout configuration privileges, you can reconfigure an existing layout.

1. Open the desired layout by selecting it from the **Personal Layouts** or **Group Layouts** sections of the **Available Layouts** list.
2. Click the **Configure Layout** button in the layout title bar.

3. The **Layout Configuration** dialog is displayed.



4. Update the layout name and the number of columns as needed.

Note: You cannot change the layout type of an existing layout from a Group Layout to a Personal Layout, or a Personal Layout to a Group Layout.

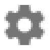
5. If you want to change the visuals of a layout, see Editing Visuals for a Layout on page 27.
6. Click **Save** to save the layout. The layout is refreshed to reflect your changes.

   Click **Close** to close the dialog without making any changes.

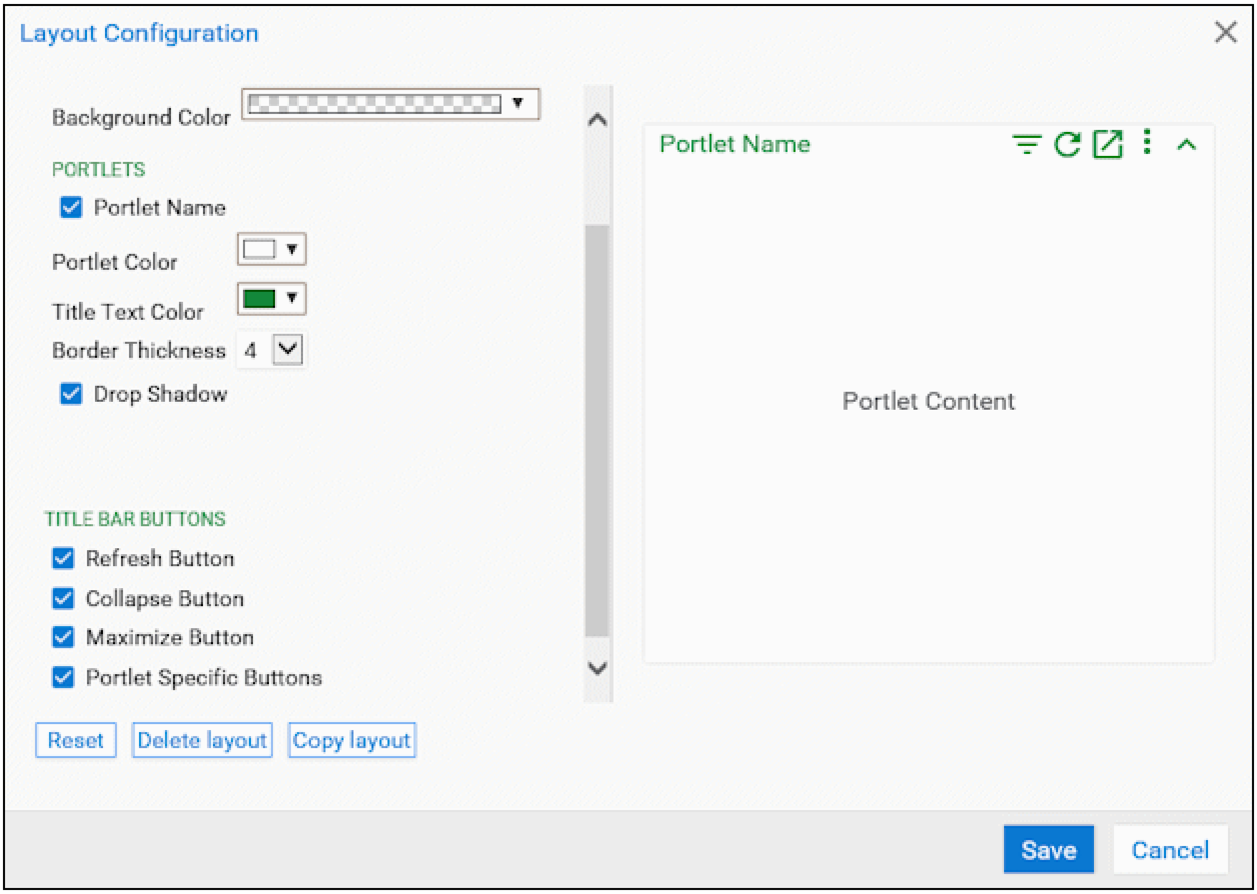
Editing Visuals for a Layout

Use the **Layout Configuration** dialog to customize the visual appearance of the current layout.

1. Open the desired layout by selecting it from the **Personal Layouts** or **Group Layouts** sections of the **Available Layouts** list.
2. Click the **Configure Layout** button in the layout title bar.



3. The **Layout Configuration** dialog is displayed.



4. Modify the following properties as needed. Your changes are reflected in the **Preview** pane.

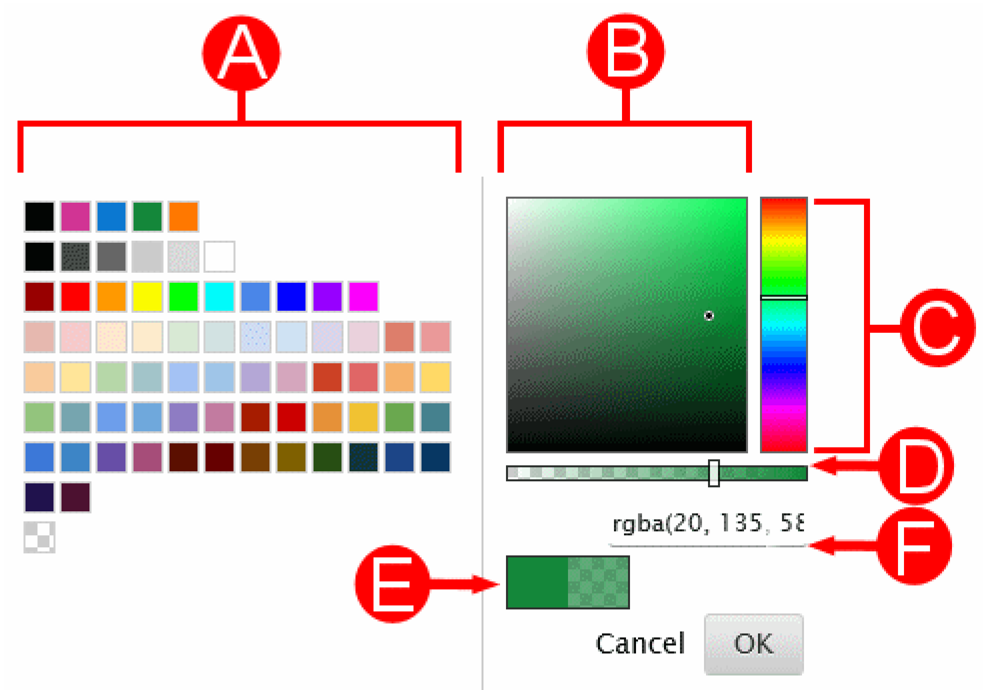
Property	Description
Background Color	Specifies the background color of the current layout. See Choosing Colors on page 30.
Portlet Name	Shows or hides the portlet name in the title bar. By default, this property is enabled.
Portlet Color	Specifies the color of portlet borders. See Choosing Colors on page 30.
Title Text Color	Specifies the color of text in portlet title bars. See Choosing Colors on page 30.
Border Thickness	Specifies the thickness (in pixels) of portlet borders. The default is 4 pixels.
Drop Shadow	Displays a drop shadow under each portlet, providing a three-dimensional effect. By default, this property is enabled.
Refresh Button	Shows or hides the **Refresh** button in portlet title bars. By default, this property is enabled.
Collapse Button	Shows or hides the **Collapse** button in portlet title bars. By default, this property is enabled.
Maximize Button	Shows or hides the **Maximize** button in portlet title bars. By default, this property is enabled.
Portlet Specific Buttons	Shows or hides portlet-specific buttons in the portlet title bar. By default, this property is enabled. For example, on WorkView Filter portlets, the title bar can include a **Create** button. This button allows users to create new objects within the configured WorkView application. When the **Portlet Specific Buttons** property is disabled, the **Create** button is unavailable in the title bar for the WorkView Filter portlet.
Reset	Resets the layout visuals to their default settings.

Note: You can override some of these properties on a per-portlet basis using portlet configuration. See Modifying Portlet Header Properties on page 50.

5. Click **Save** when finished.

Choosing Colors

The color picker allows you to choose a different color for a layout property.



Components of the color picker are described in the following table:

Component	Description
A	**Swatches Panel** Swatches are predefined colors you can choose from. Recently selected colors are displayed at the bottom of the panel. When you click a swatch, the new color is applied, and the color picker closes automatically.
B	**Saturation & Lightness Panel** This panel allows you to adjust the saturation and lightness of the selected color.
C	**Hue Slider** This slider allows you to adjust the hue of the selected color.
D	**Transparency Slider** This slider allows you to adjust the transparency of the selected color.

Component	Description
E	**Color Preview** This box allows you to compare the property's current color with the new color you selected. The new color's RGB values are displayed in the **rgb** box to the right.
F	**rgba Box** To enter a specific RGBA value, type it in the **rgba** text box below the transparency slider, and press **TAB**. Use the following format, where **R**, **G**, **B**, and **A** are the values you enter for the red, green, blue, and transparency properties of a color. For **R**, **G**, and **B**, enter a value between 0-255, and for **A** enter a value between 0.0 and 1.0.

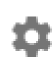
Copying Layouts

Users with sufficient privileges can create copies of existing layouts.

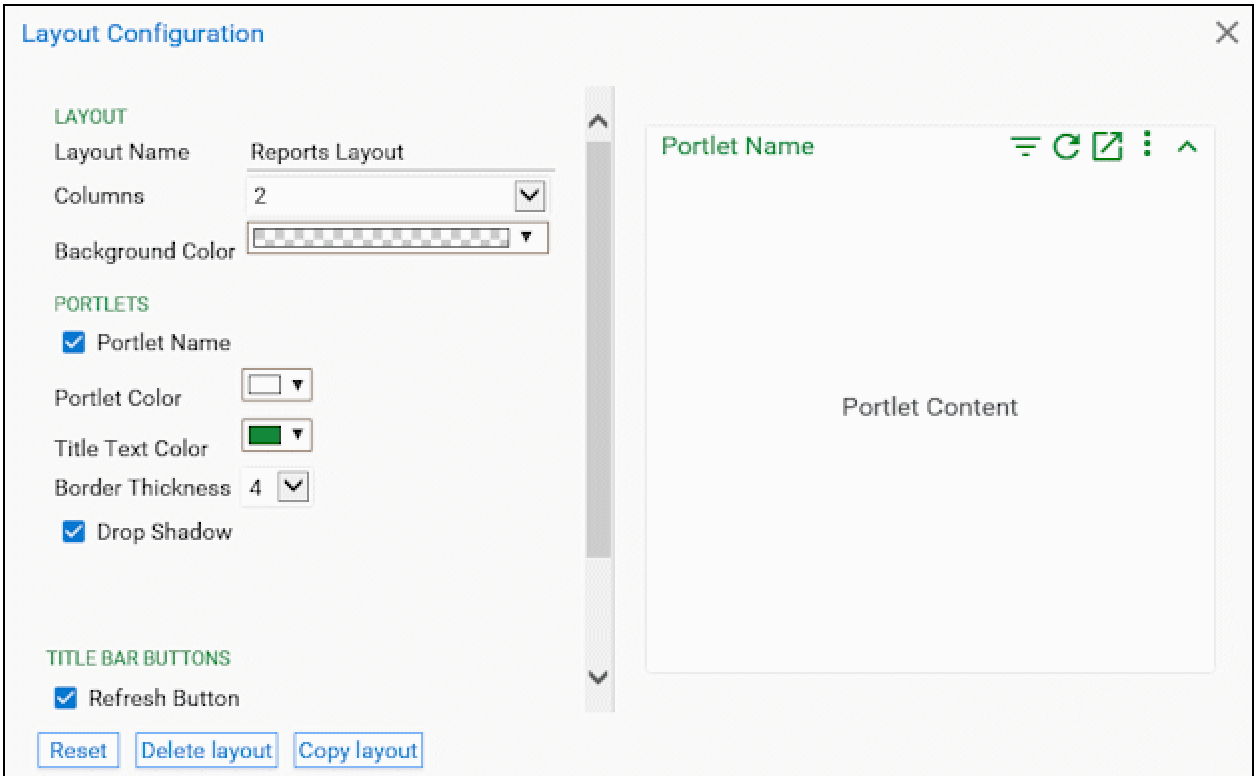
Copying Personal Layouts

Note: If you have both the Personal Layout Configuration privilege and the Group Layout Configuration privilege, when you copy a personal layout, you can make the new copy a group layout. After copying, assign privileges to the new layout as described under By Group Layout on page 20. Until you assign a user group privileges to the layout, the layout is available only to you

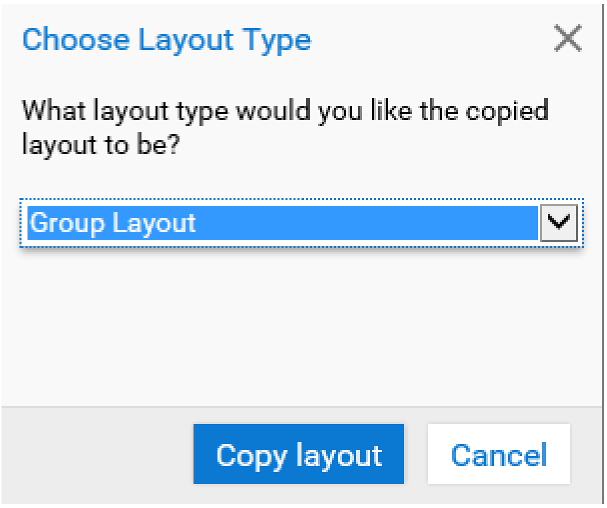
1. In StatusView, select a layout from the **Personal Layouts** section of the **Available Layouts** list.
2. Click the **Configure Layouts** button.



3. The **Layout Configuration** dialog is displayed.



4. Click **Copy layout**.
5. If you have both the **Personal Layout Configuration** privilege and the **Group Layout Configuration** privilege, the **Choose Layout Type** dialog is displayed.



6. In the drop-down, select **Group Layout** if you want the newly-copied layout to be a group layout, or **Personal Layout** if you want the newly-copied layout to be a personal layout.

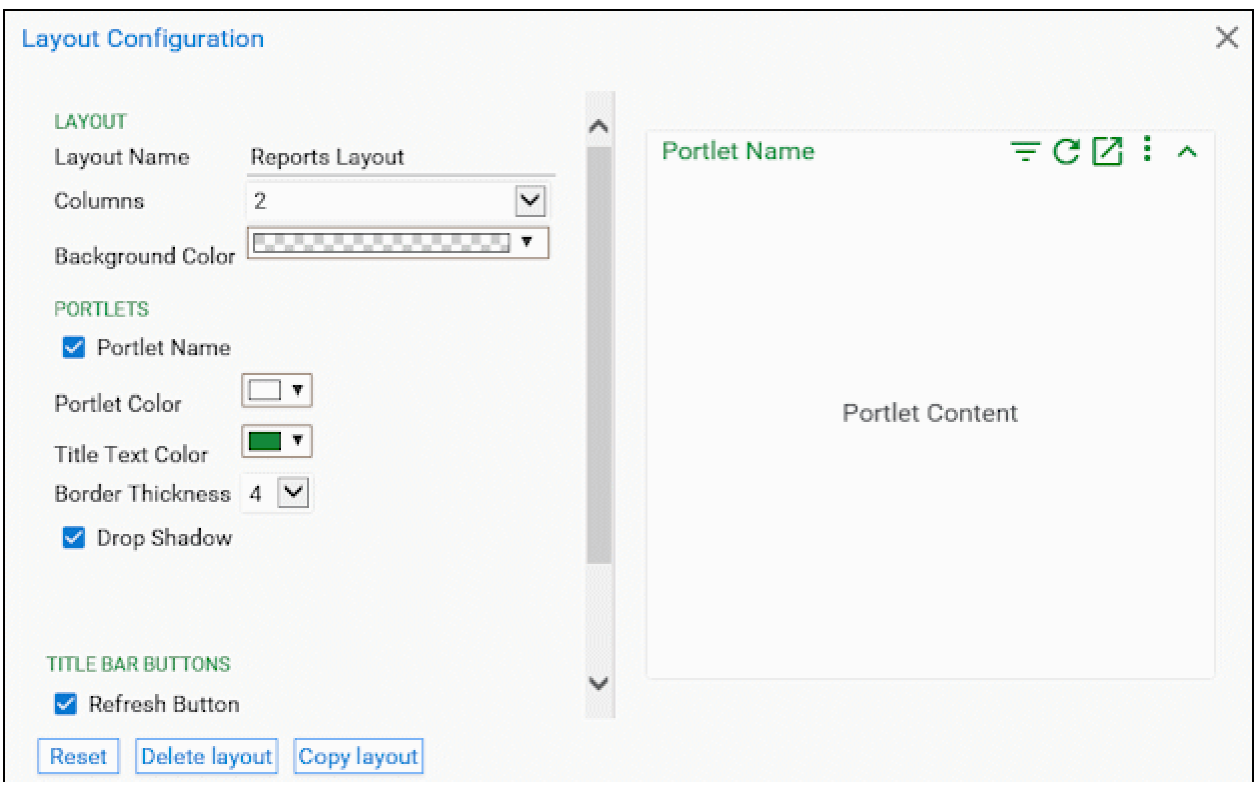
7. Click **Copy layout** to copy the layout, or click **Cancel** to close the dialog without copying the layout.
    - The copy is added to the list of layouts. It has the same name as the original layout, except **(Copy)** is appended to it.
    - To rename the copy, see Configuring an Existing Layout on page 26.
    - If you copied a group layout, assign privileges to the new layout as described under By Group Layout on page 20.

Copying Group Layouts

If you copy a group layout, the assigned privileges are not copied. This behavior allows you to copy and modify a base layout as needed for different user groups.

1. In StatusView, select a layout from the **Group Layouts** section of the **Available Layouts** list.
2. Click the **Configure Layouts** button.

3. The **Layout Configuration** dialog is displayed.



4. Click **Copy layout**.
    - The copy is added to the list of layouts. It has the same name as the original layout, except **(Copy)** is appended to it.
    - To rename the copy, see Configuring an Existing Layout on page 26.

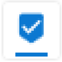
- Assign privileges to the new layout as described under By Group Layout on page 20.

Setting a Personal Layout as the Default

To set a personal layout as your default:

1. Under the **Personal Layouts** section of the **Available Layouts** list, select the personal layout you want as your default.
2. Click **Set default layout**.

3. The layout set as the default layout is marked with the following icon:



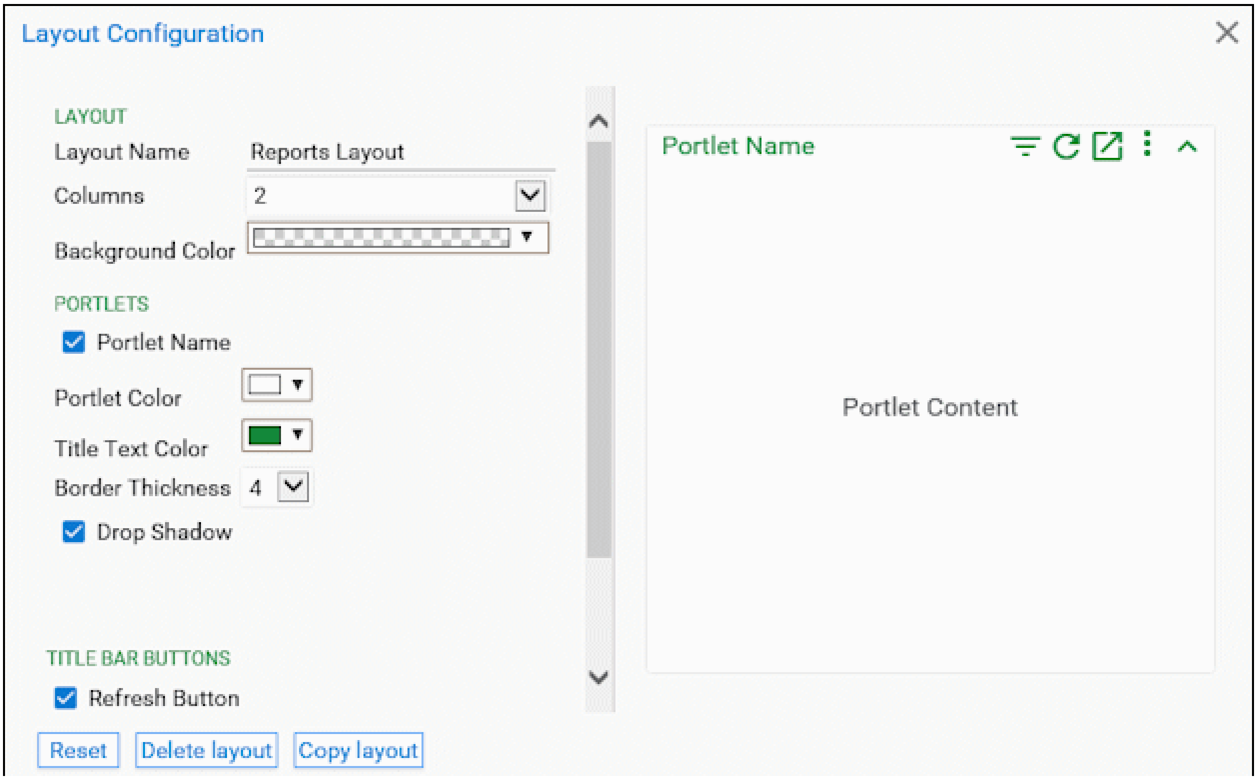
Deleting Layouts

Users with sufficient privileges can delete layouts from **My Views**.

Caution: Once you delete a layout, the layout's configuration settings are lost. To recover a deleted layout, you must manually recreate the layout and configure the portlet contents.

1. In StatusView, select a layout from the **Group Layouts** or **Personal Layouts** sections of the **Available Layouts** list.
2. Click the **Configure Layouts** button.

3. The **Layout Configuration** dialog is displayed.



4. Click **Delete layout**.
5. Click **Yes** to confirm the deletion.

Adding, Removing, and Arranging Portlets in a Layout

The following steps describe how to add, remove, and arrange portlets within a layout.

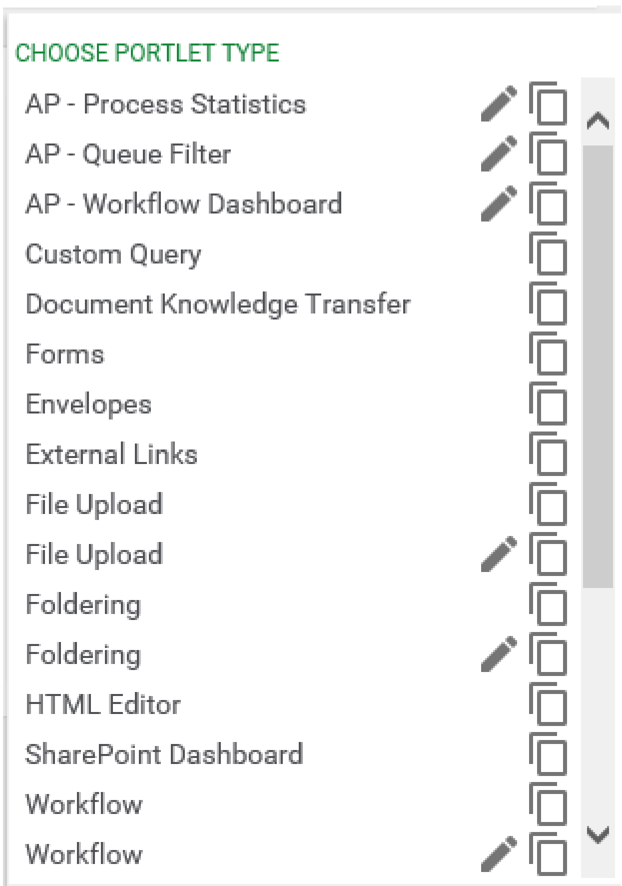
Note: When you add a portlet to a layout, the layout is refreshed, and its existing portlets return to their initial states. For example, if you had been working in a Custom Query portlet, you will need to re-execute the Custom Query to retrieve the results you were working on before you added the new portlet.

Note: Unless you have the **Group Layout Configuration** privilege, you cannot re-order portlets in group layouts. If you do have the **Group Layout Configuration** privilege, remember that your changes affect all users who have access to the layout.

Adding a Portlet to a Layout

1. Open the layout you want to modify and click the **Add Portlets** button.

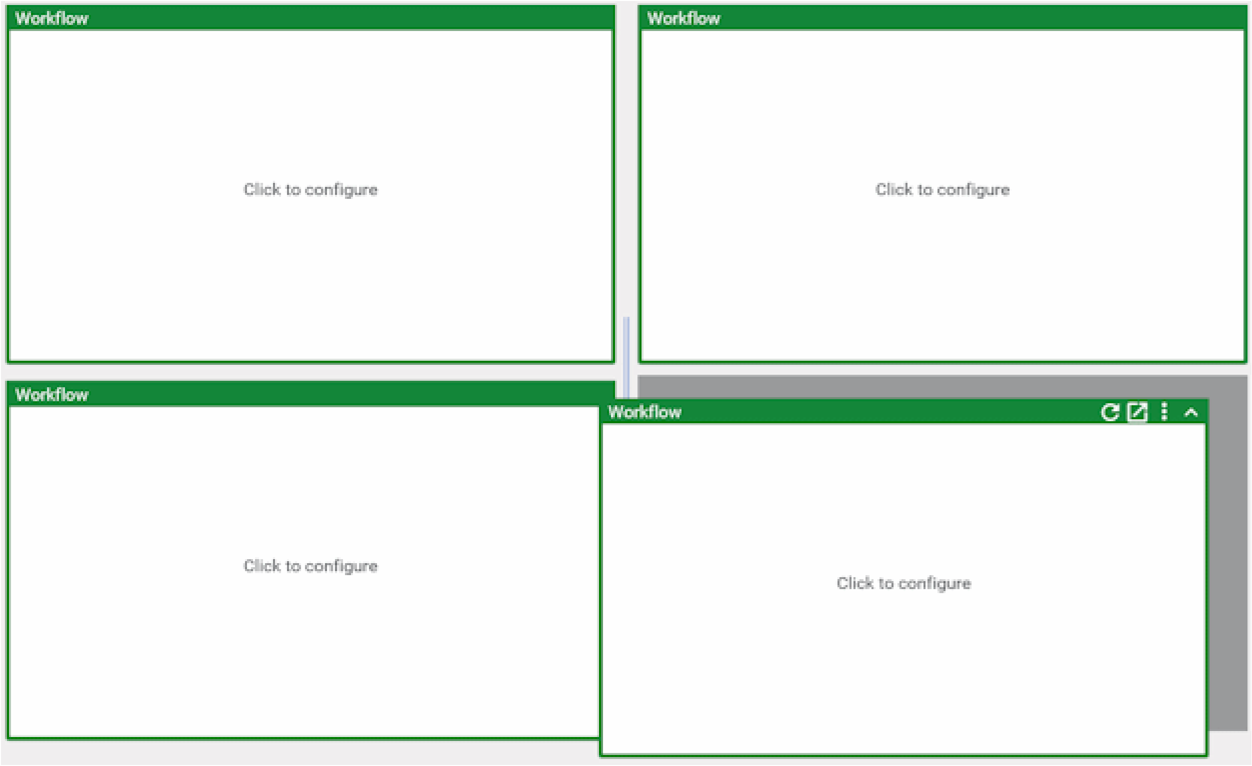
2. The **Choose Portlet Type** dialog is displayed, which will display different portlet types depending on your privileges.



3. To add a portlet, select it from the list. The portlet is added to the top of the layout.
4. Repeat for each portlet you want the layout to include. You can add the same portlet type to a page multiple times.

5. Click and drag portlets to the appropriate positions in the layout.

   The shaded area indicates the position the portlet will snap to when you release the mouse button.



Tip: Avoid creating layouts that require scrolling to see all of your portlet results. Instead, configure multiple layouts to avoid scrolling.

6. Configure each portlet. See Portlet Contents Configuration on page 49.

   To resize a portlet's height or width, see the following topics:

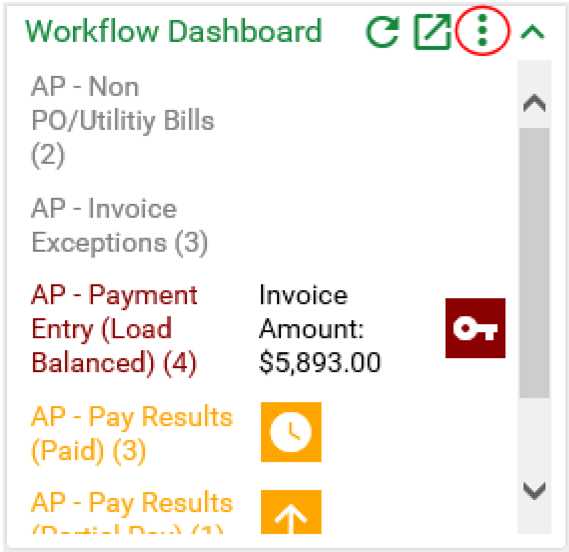
   - Resizing Portlet Heights on page 38
   - Resizing Column Widths on page 41

   To link portlets, see Linking Portlets on page 45.

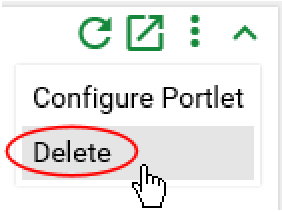
Removing a Portlet From a Layout

To remove a portlet from a layout:

1. Click the **Configure Portlet** button in the upper-right corner of the portlet.



2. Click **Delete** in the menu.



3. Click **Yes** when prompted to remove the portlet, or click **No** to keep the portlet.

Resizing Portlet Heights

There are two ways to resize a portlet's height:

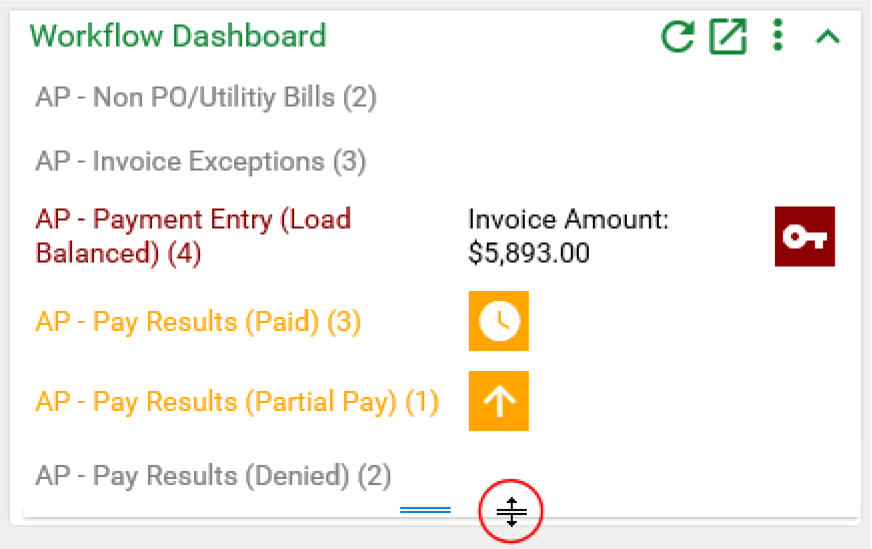
- Click-and-Drag Method on page 39
- Portlet Configuration on page 40

Note: Unless you have the **Group Layout Configuration** privilege, you cannot resize portlets in group layouts. If you do have the **Group Layout Configuration** privilege, remember that your changes affect all users who have access to the layout.

Click-and-Drag Method

To resize a portlet’s height without accessing portlet configuration, do the following:

1. Rest your pointer over the bottom edge of the portlet.

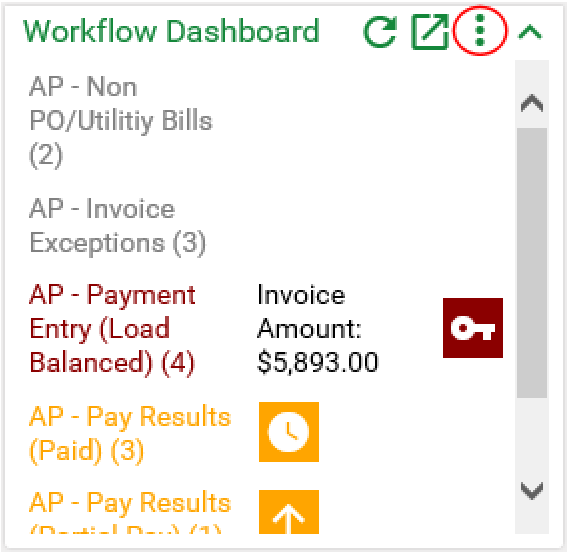


2. Click and drag the portlet to the proper height. The new height is saved automatically.

Tip: If there is a gap between the current portlet and the portlet below it, double-click the bottom edge of the current portlet (the click-and-drag handle) to automatically increase its height to fill the gap.

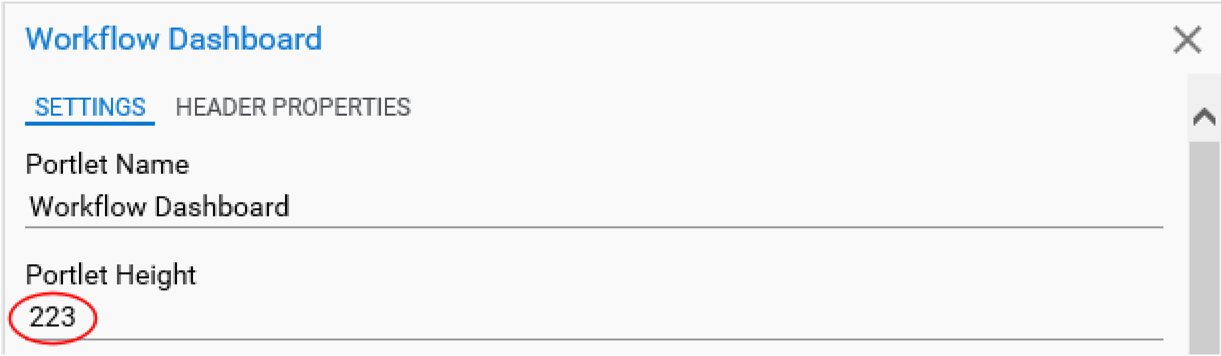
Portlet Configuration

1. Click the **Configure Portlet** button in the upper-right corner of the portlet.



2. Click **Configure Portlet** in the menu.

3. Enter the new height in pixels in the **Portlet Height** field.



4. Click **Save**.

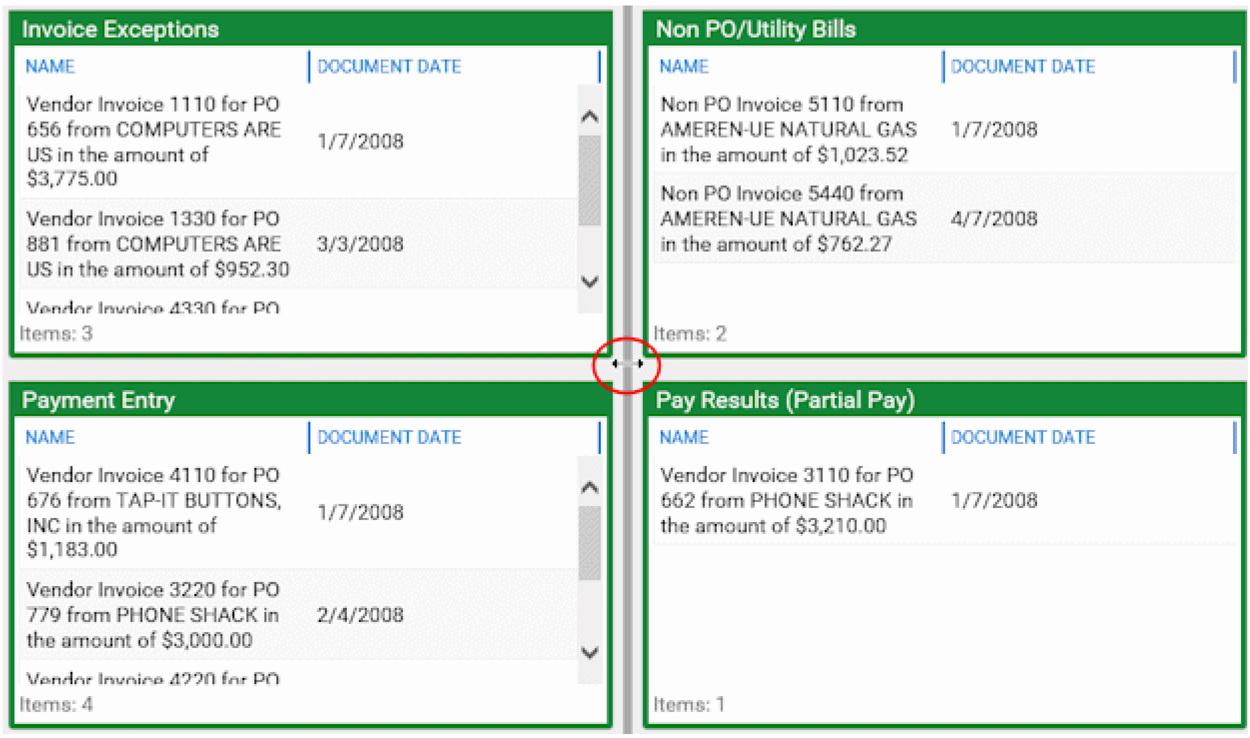
Resizing Column Widths

For multi-column layouts, you can resize columns to adjust the amount of information displayed in a portlet.

Note: Unless you have the **Group Layout Configuration** privilege, you cannot resize columns in group layouts. If you do have the **Group Layout Configuration** privilege, remember that your changes affect all users who have access to the layout.

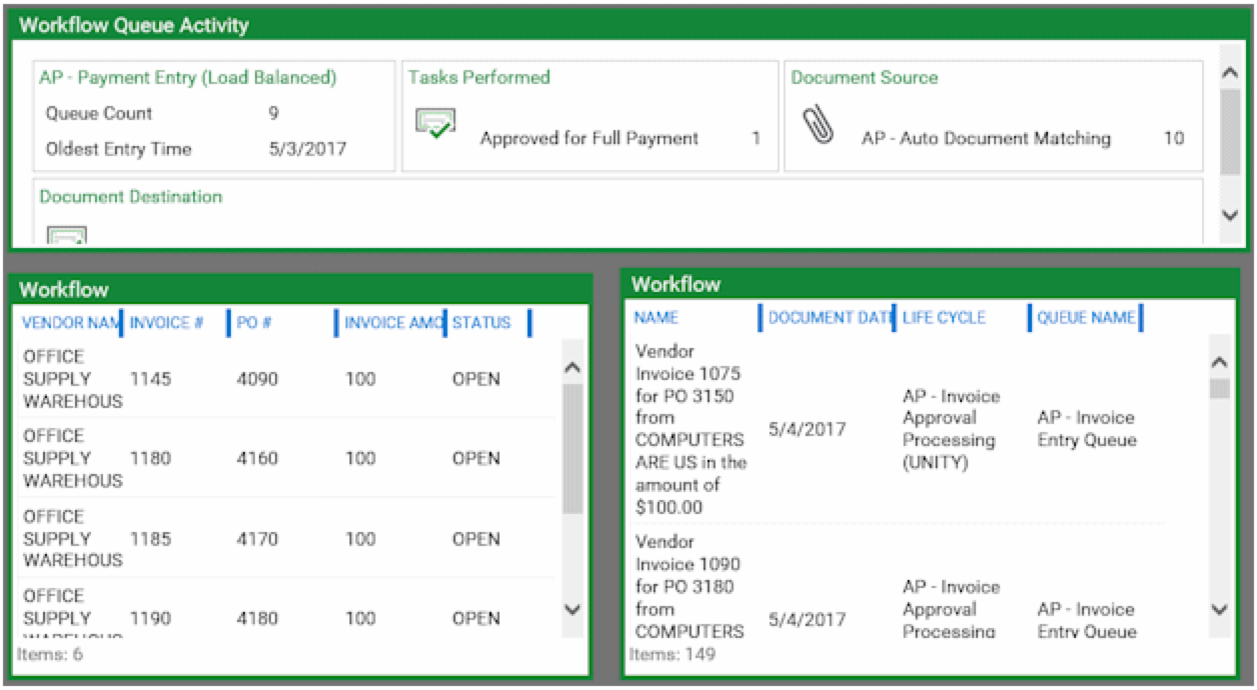
---

1. To resize a column, rest your pointer over the edge of the column.
2. Click and drag the column to the proper width. The new width is saved automatically.



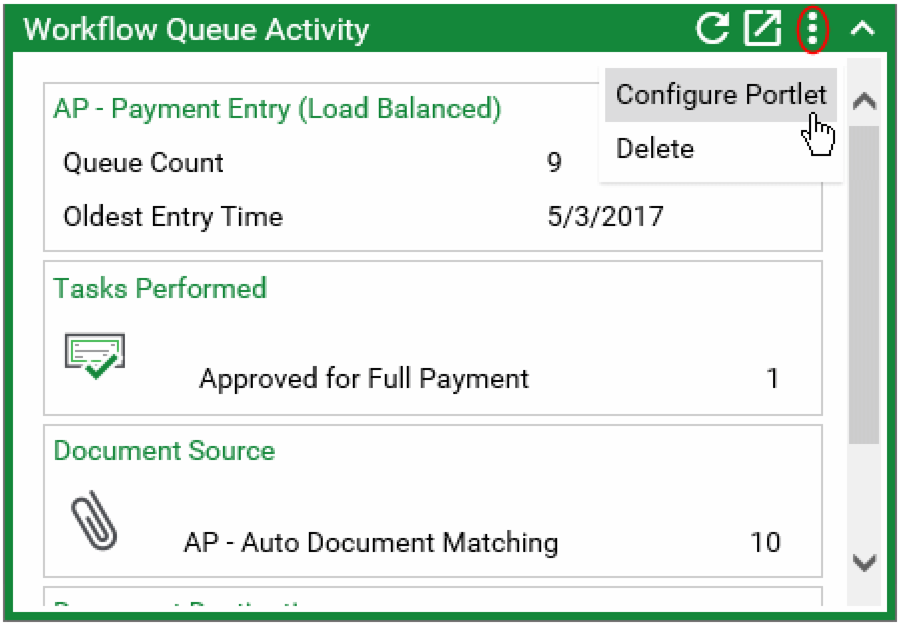
Straddling Columns

You can widen individual portlets by making them span multiple layout columns. For example, a portlet may contain several columns of information. By straddling the portlet across multiple layout columns, you can improve how its contents are displayed.

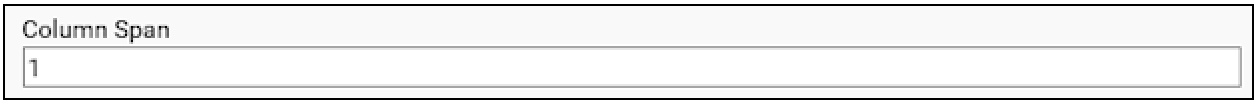


To configure a portlet to straddle columns:

1. Click the **Configure Portlet** button and select **Configure Portlet** in the menu.



2. In the **Column Span** field, enter the number of columns this portlet should be allowed to span. This value cannot be greater than the number of columns in the current layout.



3. Click **Save**. If there are additional columns to the right of the portlet's current column, the portlet will start straddling columns automatically.
4. If the portlet does not straddle columns automatically, click and drag the portlet to the left.
   - When you place the portlet in the leftmost column, it will span the number of columns you entered in the **Column Span** field.
   - When you place the portlet in the rightmost column, it will span only one column.

See the following topic for additional notes and tips.

Notes and Tips for Spanned Portlets

When arranging a layout with portlets that span multiple columns, be aware of the following:

- Resizing portlets above a spanned portlet has some nuances. For example, if a portlet spans two columns, resizing a portlet in column 1 will move the spanned portlet up or down; resizing a portlet in column 2 will not.
- Results may vary when you attempt to move portlets to a location above a spanned portlet. If a portlet is too tall to fit the space above a spanned portlet, the portlet may be played below the spanned portlet.

Linking Portlets

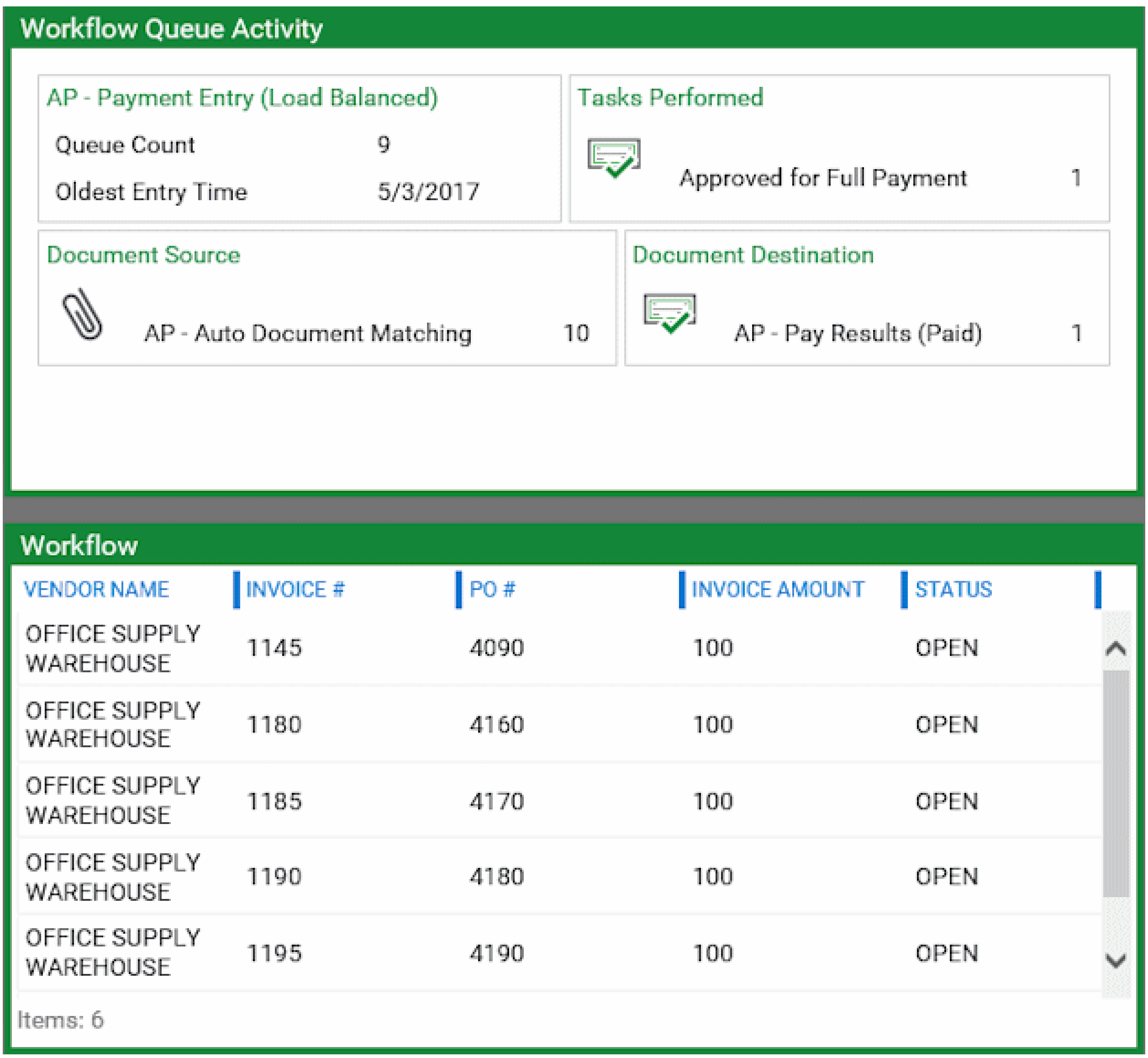
If two or more portlets should be viewed as a single unit, you can vertically link them. By linking portlets, you can consolidate related content and use space more efficiently.

When portlets are linked, they share the same title bar and border. The title bar of the topmost portlet (the parent portlet) is used for the entire group.

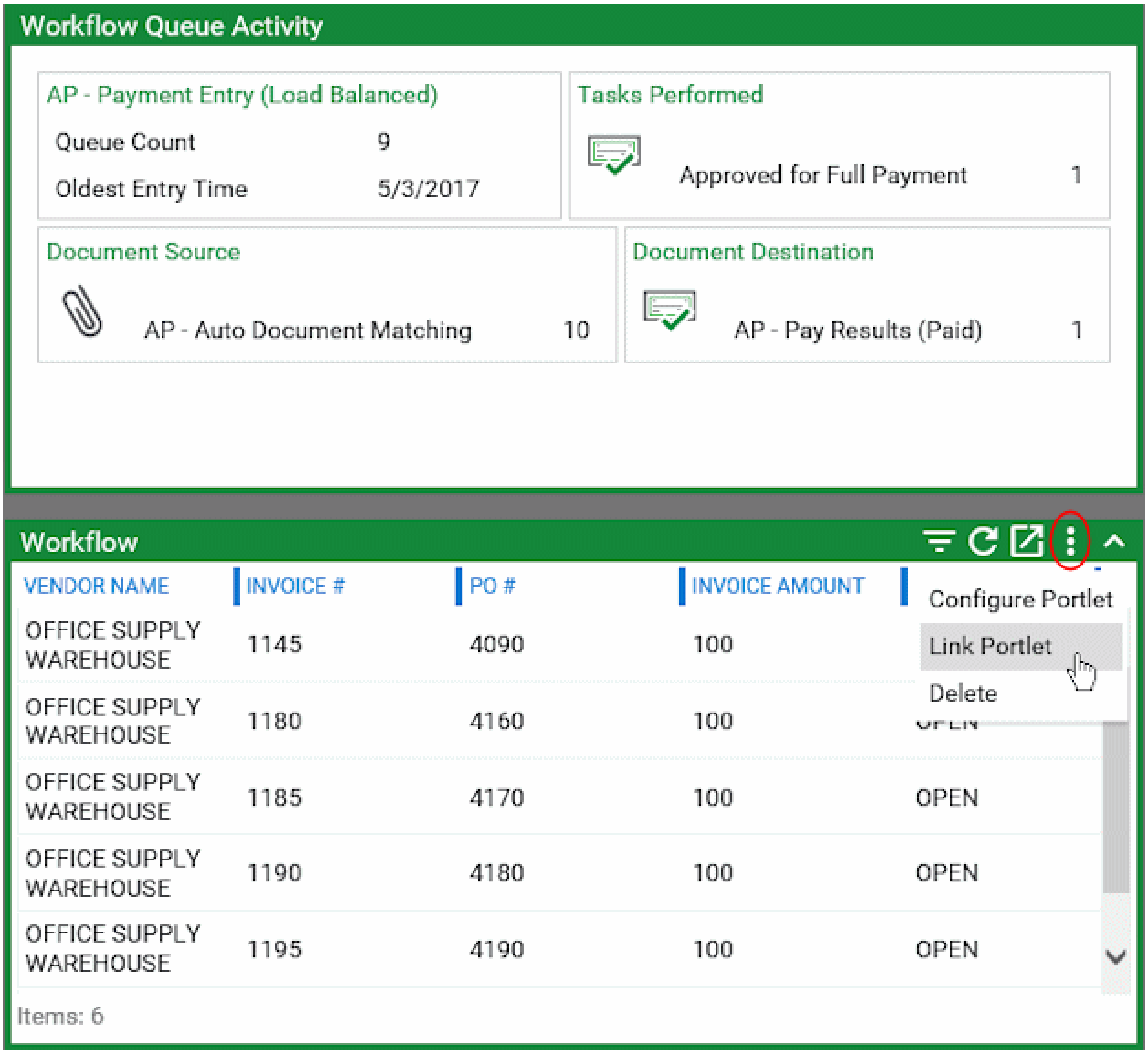
Note: The topmost portlet in a layout will not display the **Link With Above Portlet** button.

---

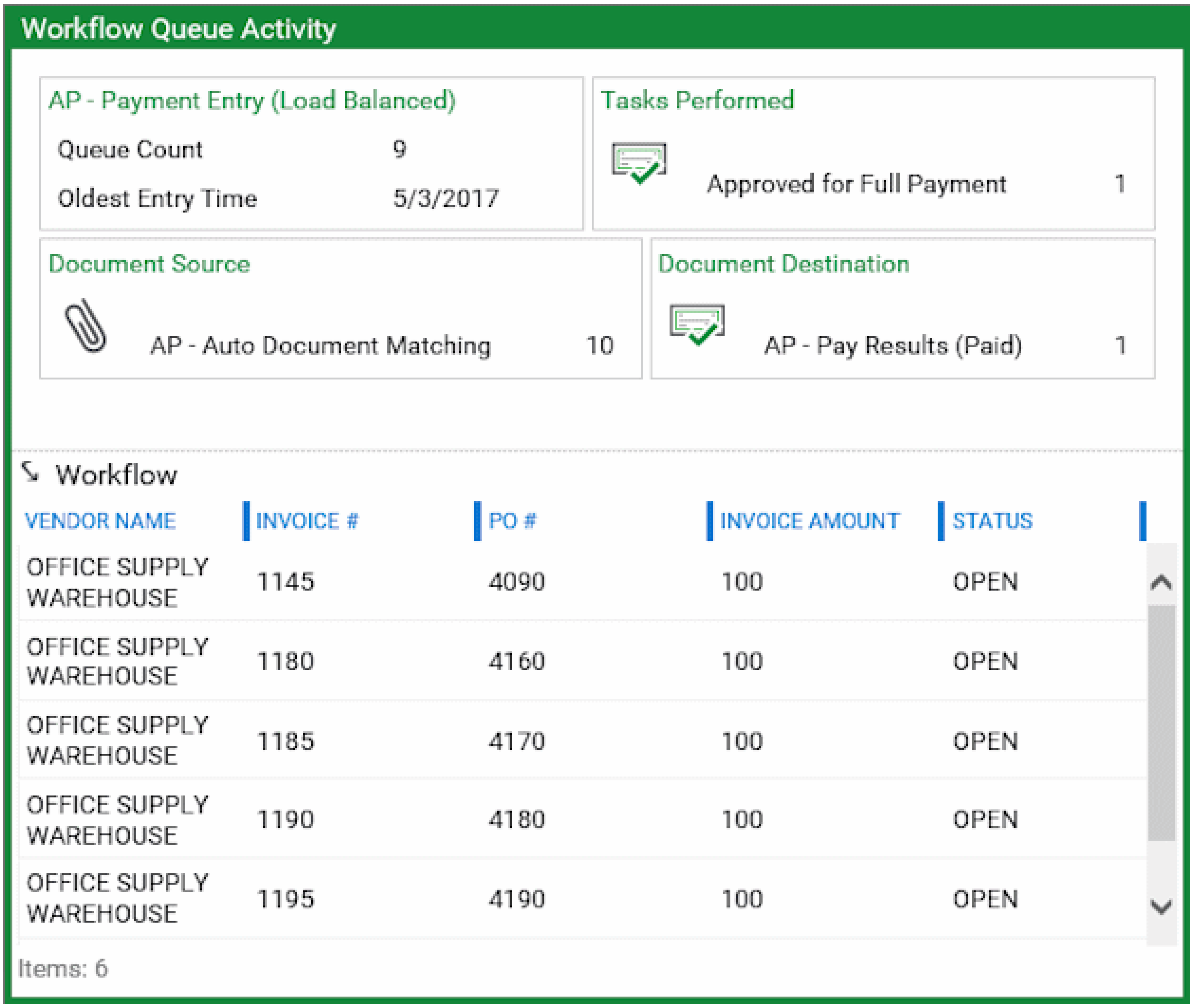
1. Arrange the portlets you want to link in a column.



2. On the bottommost portlet, click the **Configure Portlet** button and select **Link Portlet** in the menu.



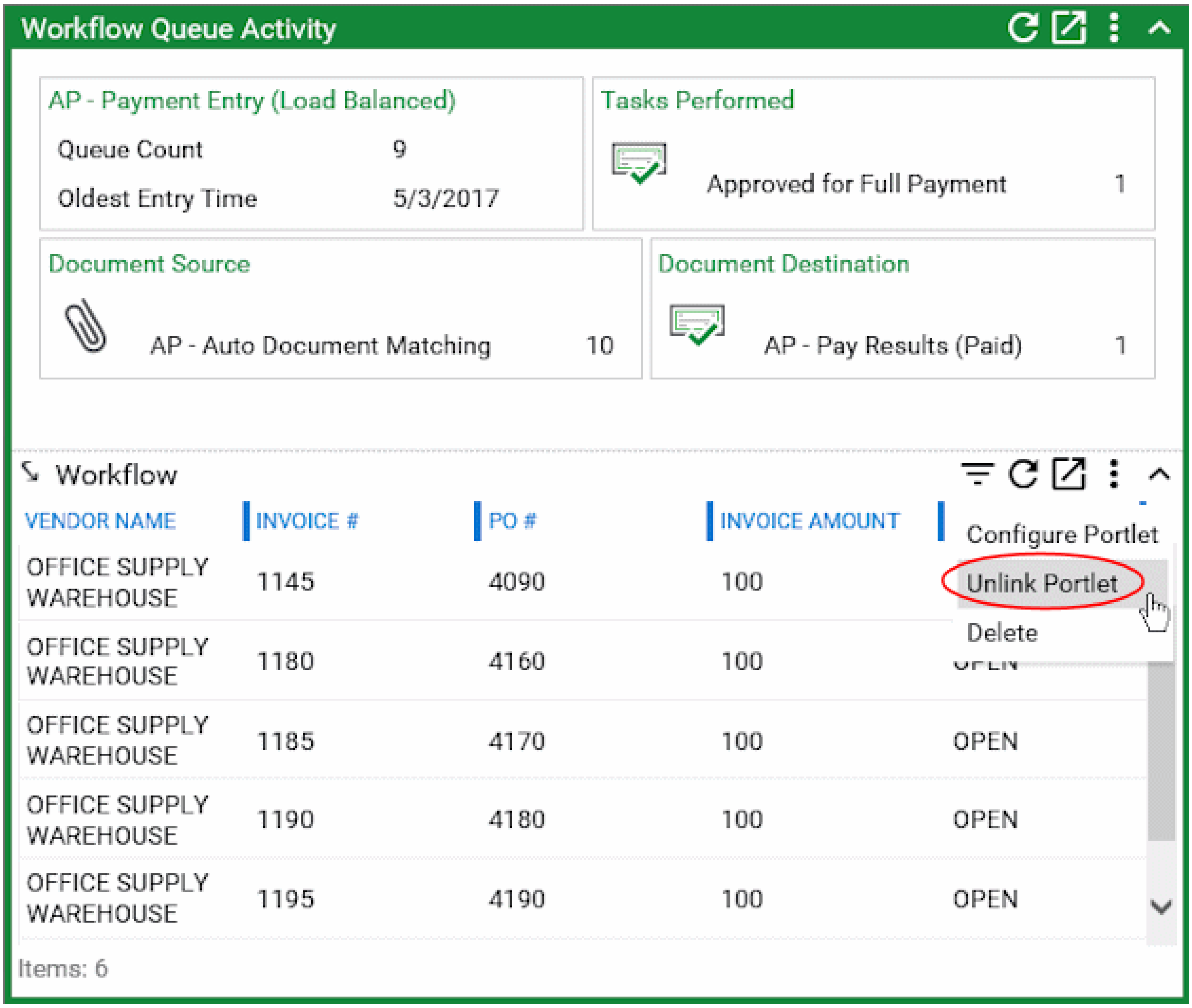
3. The portlet is linked with the portlet above it.



4. Repeat for additional portlets you want to link to this unit.

Unlinking Portlets

To unlink a portlet from the one above it, click the **Configure Portlet** button of the portlet you want to unlink, and select **Unlink Portlet** in the menu.

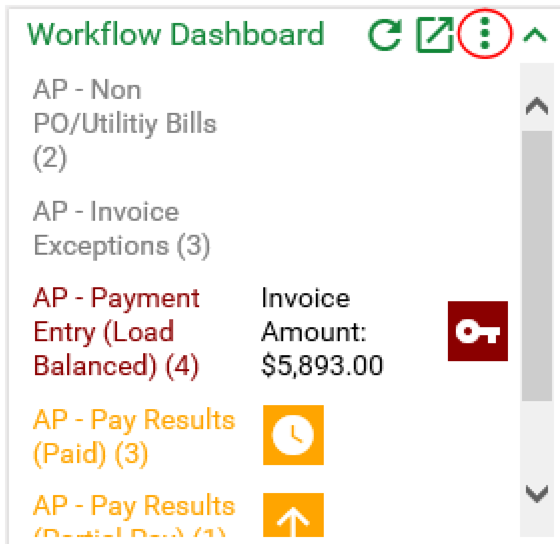


Portlet Contents Configuration

Because each instance of a portlet can display different data in its contents, each instance of a portlet must be configured. Each portlet type has its own set of configuration options.

To configure a portlet, follow these steps:

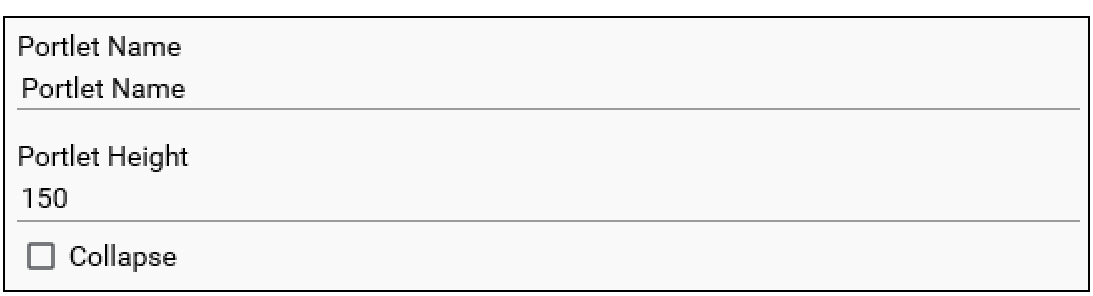
1. In the layout that you want to configure, click the **Configure Portlet** button.



2. Select **Configure Portlet** in the menu.

   The portlet's configuration options are displayed in the resulting dialog box.

3. Type a descriptive name in the **Portlet Name** field.



4. Enter the **Portlet Height** in pixels.

5. If you want the portlet to be collapsed by default, select the **Collapse** option.
6. Configure the options as described in the following topics:

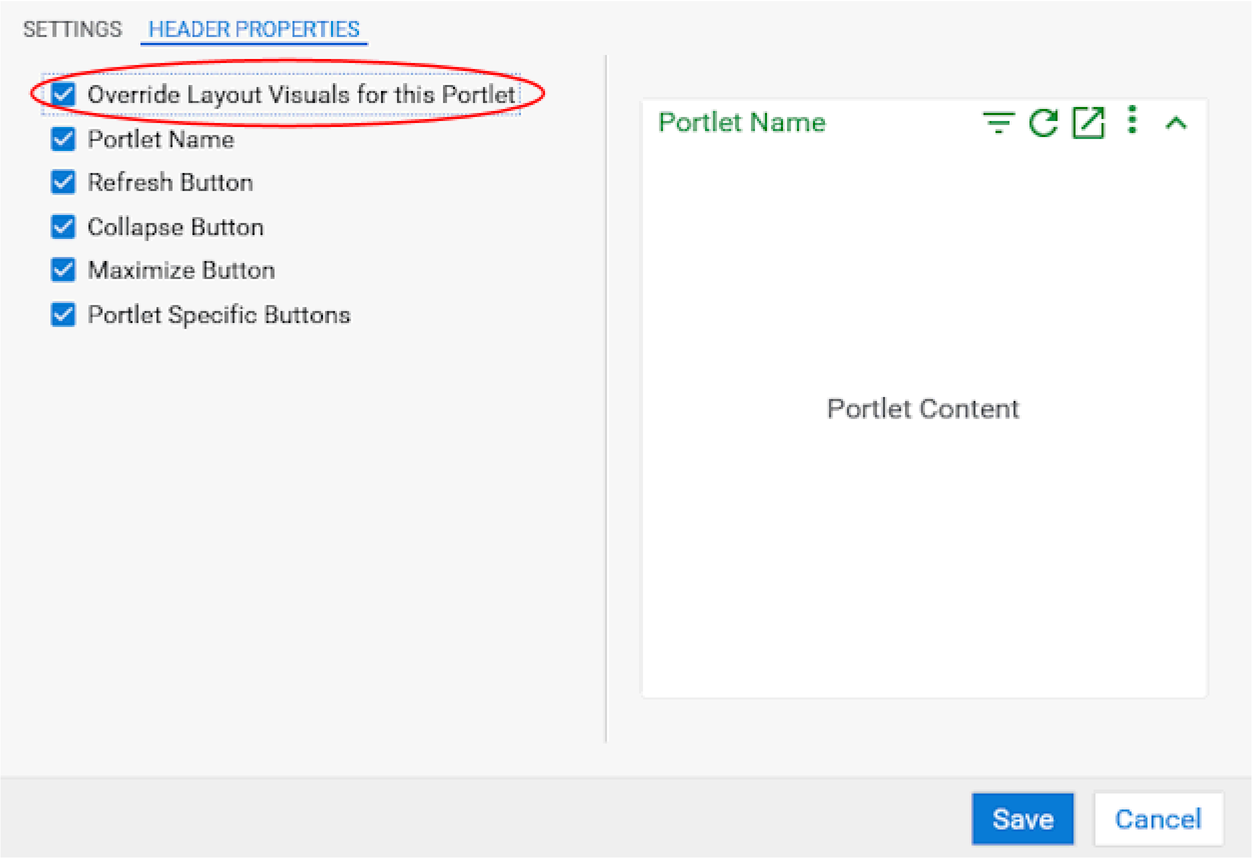
    - Modifying Portlet Header Properties on page 50
    - Custom Query Portlet on page 52
    - Document Knowledge Transfer Portlet on page 55
    - Envelope Portlet on page 56
    - External Links Portlet on page 57
    - File Upload Portlet on page 58
    - Foldering Portlet on page 59
    - Form Portlet on page 65
    - HTML Editor Portlet on page 66
    - Workflow Portlet on page 69
    - Workflow Dashboard Portlet on page 70
    - Workflow Process Statistics Portlet on page 74
    - Workflow Queue Activity Portlet on page 77
    - Workflow Queue Filter Portlet on page 79
    - WorkView Filter Portlet on page 81
    - WorkView Summary Portlet on page 82

Modifying Portlet Header Properties

You can configure a portlet to override the default header properties configured for the layout.

1. Access portlet configuration as described in the previous procedure.
2. Click the **Header Properties** tab in the portlet's configuration dialog box.

3. Select the **Override Layout Visuals for this Portlet** option.



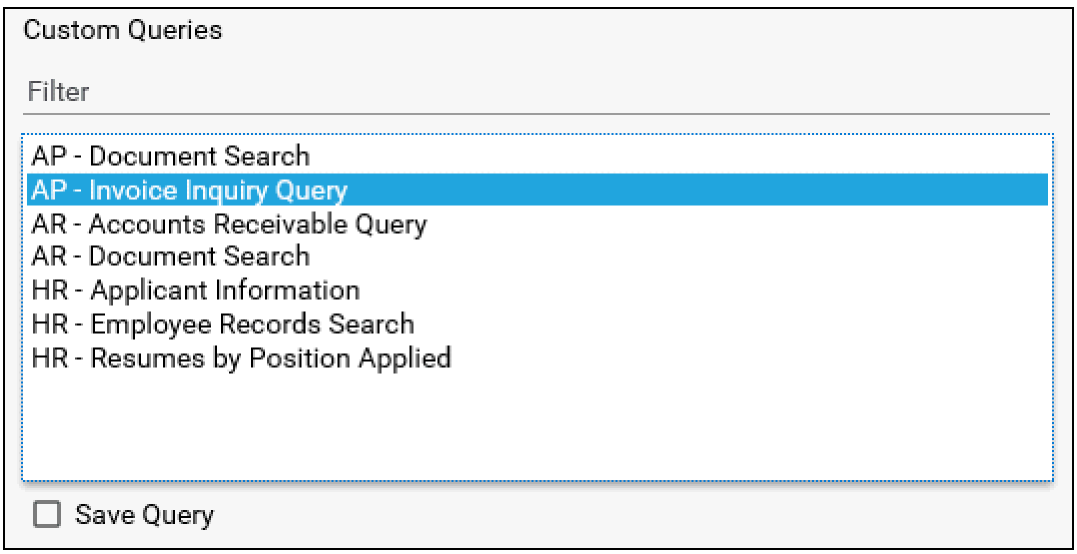
4. Modify the following properties as needed. Your changes are reflected in the **Preview** pane.

Property	Description
Portlet Name	Shows or hides the portlet name in the title bar.
Refresh Button	Shows or hides the **Refresh** button in portlet title bars.
Collapse Button	Shows or hides the **Collapse** button in portlet title bars.
Maximize Button	Shows or hides the **Maximize** button in portlet title bars.

Property	Description
Portlet Specific Buttons	Shows or hides portlet-specific buttons in the portlet title bar. For example, on WorkView Filter portlets, the title bar can include a **Create** button. This button allows users to create new objects within the configured WorkView application. When the **Portlet Specific Buttons** property is disabled, the **Create** button is unavailable in the title bar for the WorkView Filter portlet.

5. Click **Save**.

Custom Query Portlet



1. Select a custom query.

Note: External text search custom queries are not supported in StatusView custom query portlets.

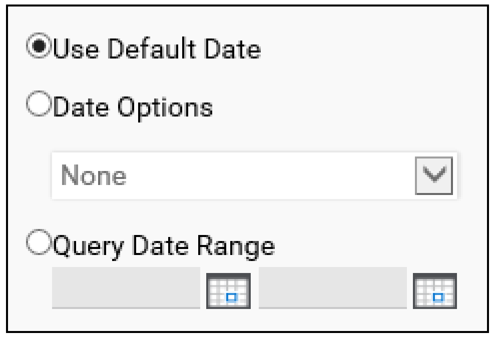
Note: Full-Text custom queries are only supported if your solution is licensed for Full-Text Search. See the **Full Text Search** module reference guide for more information.

Note: Folder Type custom queries are not available. To search for folders, use a folder portlet.

2. To allow users to enter their own retrieval values, skip to step 4.

   To create a predefined query, select the **Save Query** option. This option is available for standard custom queries only; it is not available for HTML custom queries.

   Fields for the query's configured retrieval keywords are displayed. If the query supports date ranges, the following options are displayed:



   a. Select one of the following options, if applicable.

Option	Description
Use Default Date	Select to use the custom query's default date, if one has been assigned to the query in OnBase Configuration.
Date Options	Select to use a dynamic date or date range, such as yesterday, last month, or year-to-date. Proceed to the next step for information about each option.
Query Date Range	Select to use a range of specific dates.

   b. If you selected **Date Options**, choose one of the options from the drop-down, as described in the following table. If the option has additional parameters (such as Specific Day), the parameters become available when the date option is selected.

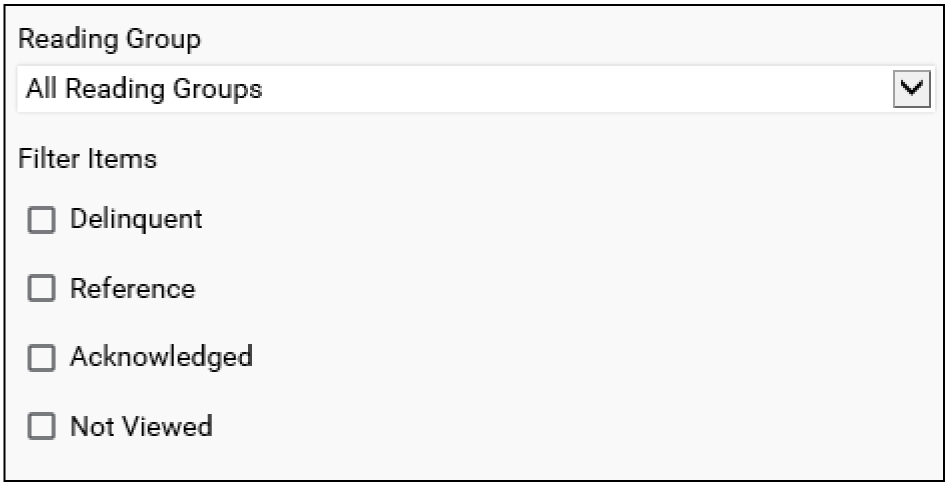
Date Options	Description
None	No default date is used.
Last Weekday	The previous business day is used as a default. Friday is considered the last day of the week.
Last Business Day	The previous business day is used as a default. Saturday is considered the last business day of the week.
Yesterday	Yesterday's date is used as the default date.
Today	Today's date is used as the default date.
First of the Month	First day of the current month is used as the default date.

Date Options	Description
Last of the Month	Last day of the previous month is used as the default date.
Specific Day	The specified day of the week is used as the default date.
Last Month	The date range of the prior month is used as the default date range.
Current Month	The date range of the current month is used as the default date range.
Current Week	The date range of the current week is used as the default date range.
Month to Date	The date range extends from the first day of the current month and the current date.
Year to Date	The date range extends from the first day of the year to the current date.
__ Previous Days	The date range is determined by the number of days specified. Valid values are 1-365.
__ Previous Weeks	The date range is determined by the number of weeks specified. Valid values are 1-52.
__ Previous Months	The date range is determined by the number of months specified. Valid values are 1-12.

3. Enter the appropriate values for the query.
4. Click **Save**.

Note: The Web Server's web.config file contains settings that limit the number of documents a custom query can return before an error message is displayed to the user. Of these settings (**sv_nDocQueryLimit** and **sv_nDocLowerQueryLimit**), only **sv_nDocQueryLimit** is respected. If the number of documents returned exceeds the number configured for **sv_nDocQueryLimit**, then the query will not be executed, and the user will be prompted to add parameters to further limit the search.

Document Knowledge Transfer Portlet



1. Select a **Reading Group**.
2. Select a filter specifying the status of reading group documents that should be displayed in the portlet:

Filter Item	Description
Overdue	Select to display only documents that are past their deadline dates and have not yet been acknowledged.
Reference	Select to display only documents that have been marked for reference.
Acknowledged	Select to display only acknowledged documents.
Not Viewed	Select to display only documents that have not yet been acknowledged.

Note: The **Not Viewed** and **Acknowledged** filters cannot be selected together. If you select **Acknowledged** and then select **Not Viewed**, the **Acknowledged** filter is removed.

3. Click **Save**.

Envelope Portlet

1. Select the appropriate envelopes.
2. If you want to select all of the envelopes, click the **Select All** button.

3. If you want to remove all of the selected envelopes, click the **Clear Selected** button.

4. Click **Save**.

External Links Portlet

1. In the **Link Name** field, type the text users should click to access the link.

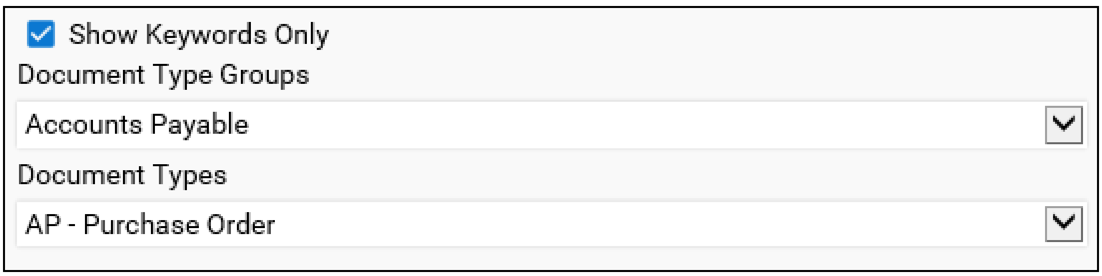
   For example, if you're creating a link to the Microsoft Support site, you might name the link **Microsoft Support**.
2. Select one of the following from the **URL** drop-down:
   - **http://**
   - **https://**
   - **ftp://**
   - **UNC**
3. In the **URL** field, do one of the following:
   - Type the remaining part of the URL. If you selected **ftp://**, then this value must begin with **www.**
   - If you selected **UNC**, type the UNC file path. UNC paths must begin with ****.
4. Click **Add Link** to add the link to the **Links** list.
5. Repeat steps 1–4 for each link the portlet should display.
6. Click **Save**.

Removing a Link

To remove a link from the portlet, use the following steps. You may want to remove links to change the link order or to correct a mistake in an existing link.

1. Select the link from the **Links** list.
2. Click **Remove Link**.
3. Repeat for each link you want to remove.
4. Click **Save**.

File Upload Portlet



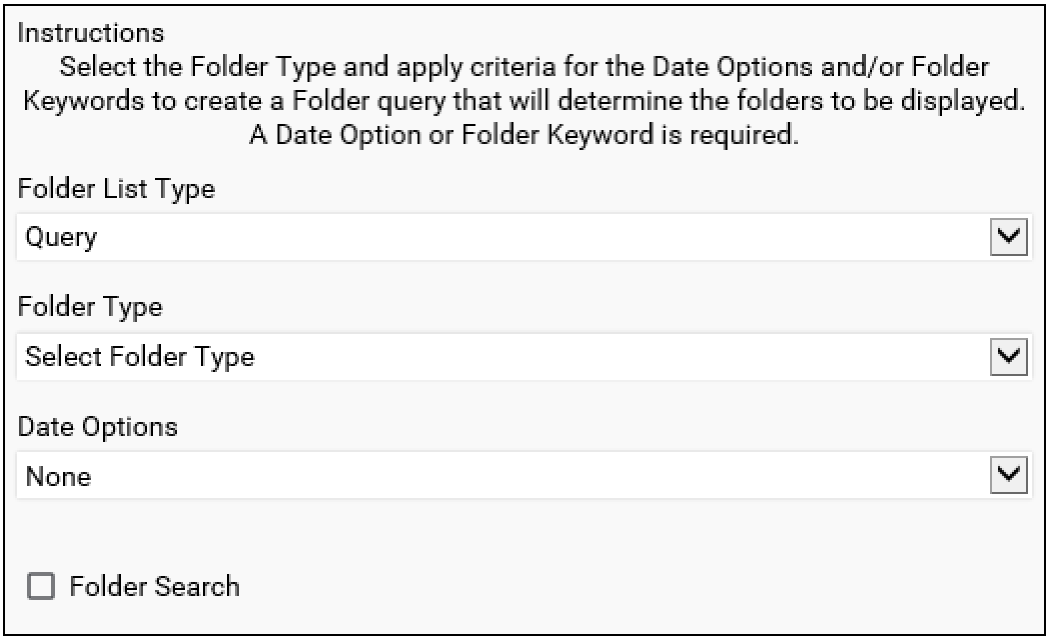
1. To select a default Document Type, select the **Show Keywords Only** option.
2. Select the appropriate Document Type Group from the **Document Type Groups** drop-down list.
3. Select the appropriate Document Type from the **Document Types** drop-down list.

Note: When you select a default Document Type, users do not have the ability specify the Document Type Group, Document Type, File Type, or Document Date. The Document Date defaults to the date the document is uploaded.

4. Click **Save**.

Foldering Portlet

Foldering portlets can be configured to display specific folders or to query for folders to display. Both configurations offer a search option for users to search for the folders they need.

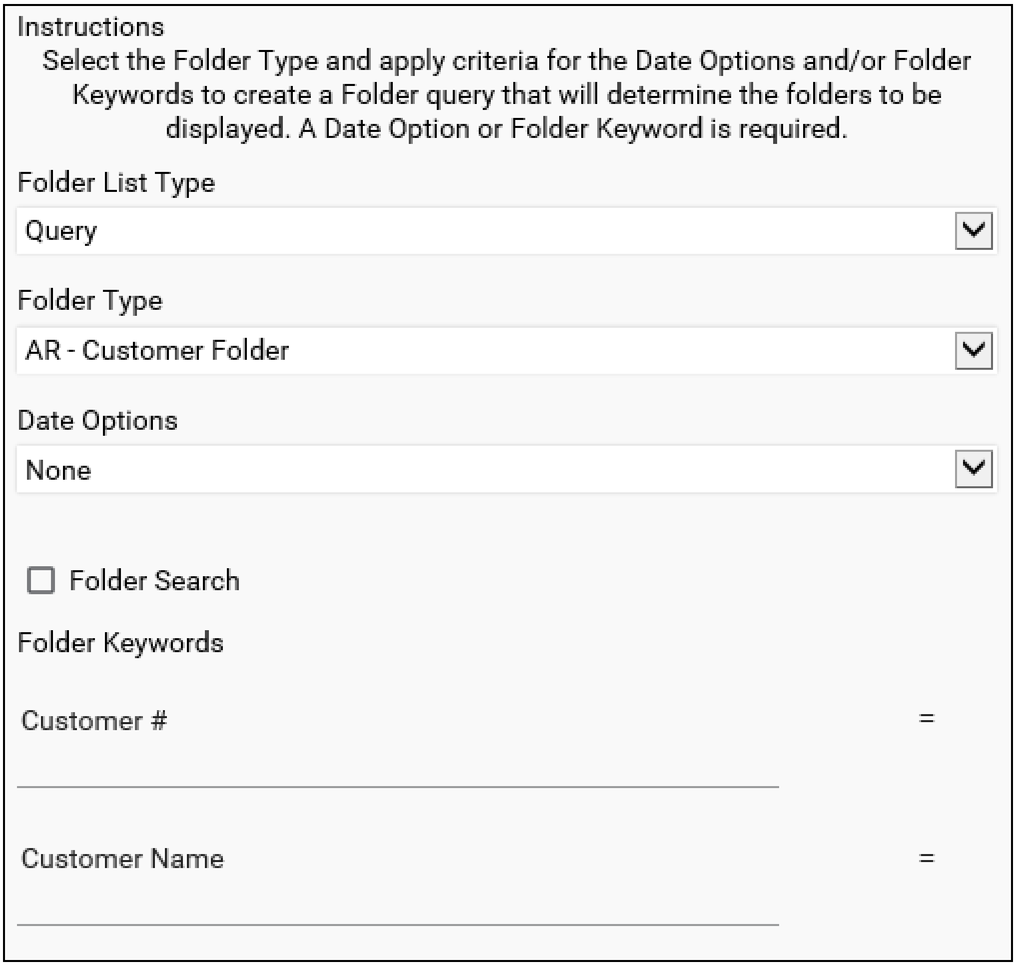


Do one of the following:

- To display folders that satisfy specific criteria, see Querying for Folders to Display on page 60.
- To display specific folders you have selected from the folder tree, see Selecting Folders to Display on page 62.
- To use the portlet only for folder searching, see Enabling Folder Search Only on page 63.

Querying for Folders to Display

A query displays all folders that satisfy specific criteria within a Folder Type. This option is helpful if folders should be added to the portlet automatically upon creation.

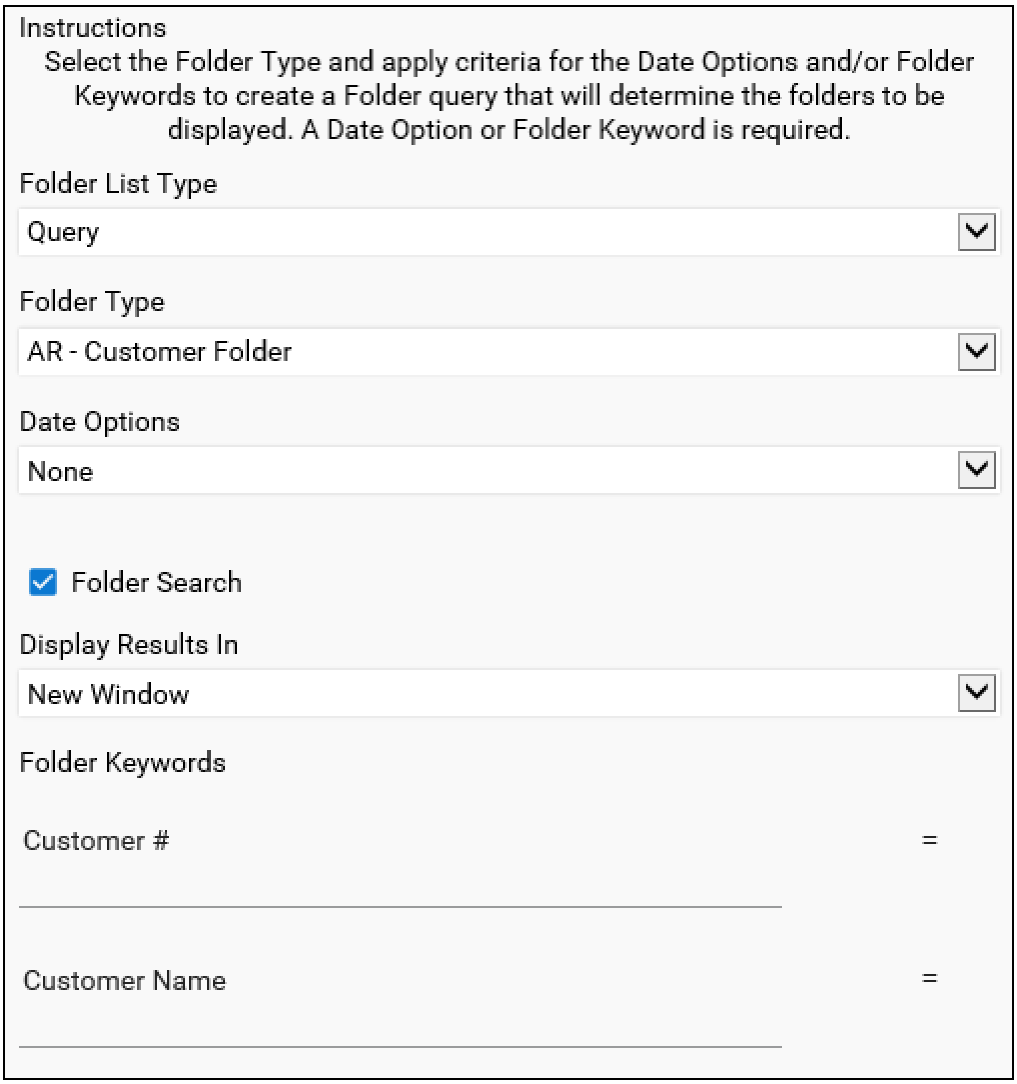


1. Under **Folder List Type**, select **Query**.
2. Select the **Folder Type** for the query.
3. Under **Date Options**, select or enter the date range of folders to be retrieved. Select **None** to use no date constraints.
4. Under **Folder Keywords**, enter any Keyword values for folders to be retrieved. Available fields vary depending on the selected Folder Type. If no Keyword Types are assigned to the Folder Type, then no Keyword fields are available.

Note: The configuration must contain at least one constraint. Either a date option other than **None** must be selected, or at least one Keyword value must be provided.

5. To allow users to also search for folders, select **Folder Search**.

6. From the **Display Results In** drop-down, select how the user's folder search results should be displayed. This option is available only if you selected **Folder Search**.
   - **New Window**—Folder search results are displayed in a new Folders window.
   - **Same Window**—Folder search results are displayed in a **Results** tab within the current portlet.

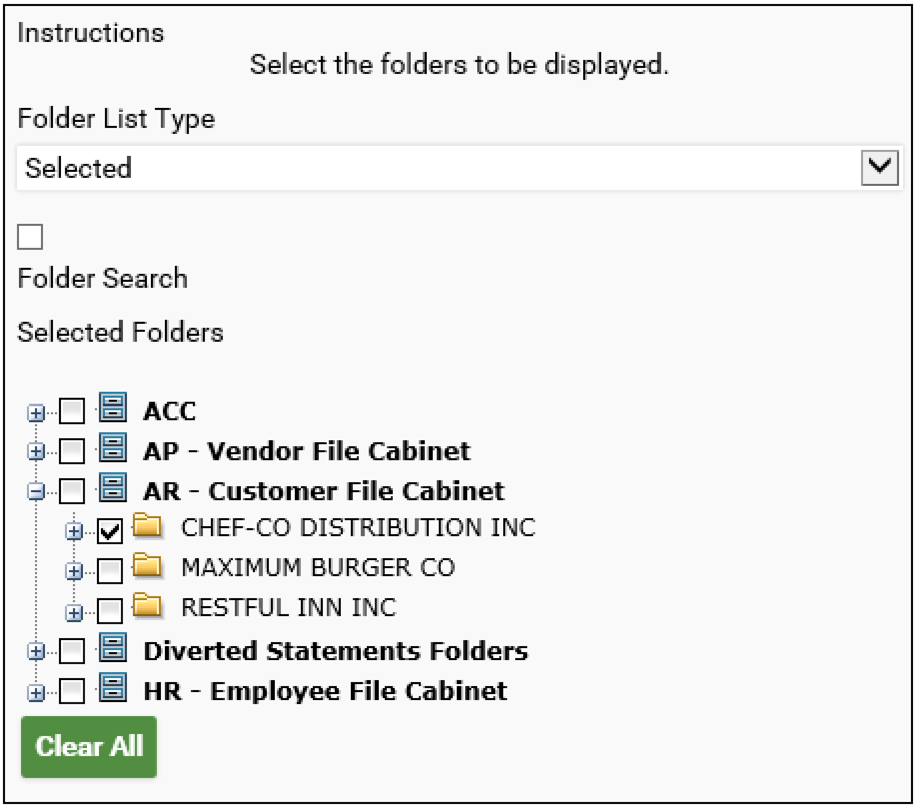


Note: The **Display Results In** setting does not apply to the folders returned by the configured folder query. When a user selects a folder query result, the folder is opened in the Folders window.

7. Click **Save**.

Selecting Folders to Display

Use this option to display one or more specific folders that are referred to often. If the portlet should display folders that belong to the same Folder Type and meet specific criteria, use the folder query option described in the previous topic.



1. Under the **Folder List Type** drop-down, select **Selected**.
2. Click a file cabinet to display its folders.
3. Select the check box next to each folder or file cabinet the portlet should display.
    - The portlet will display both the selected folder and any child folders within the selected folder. If you do not want to display all child folders, clear the check box next to the parent folder, and select only the child folders you want to display.

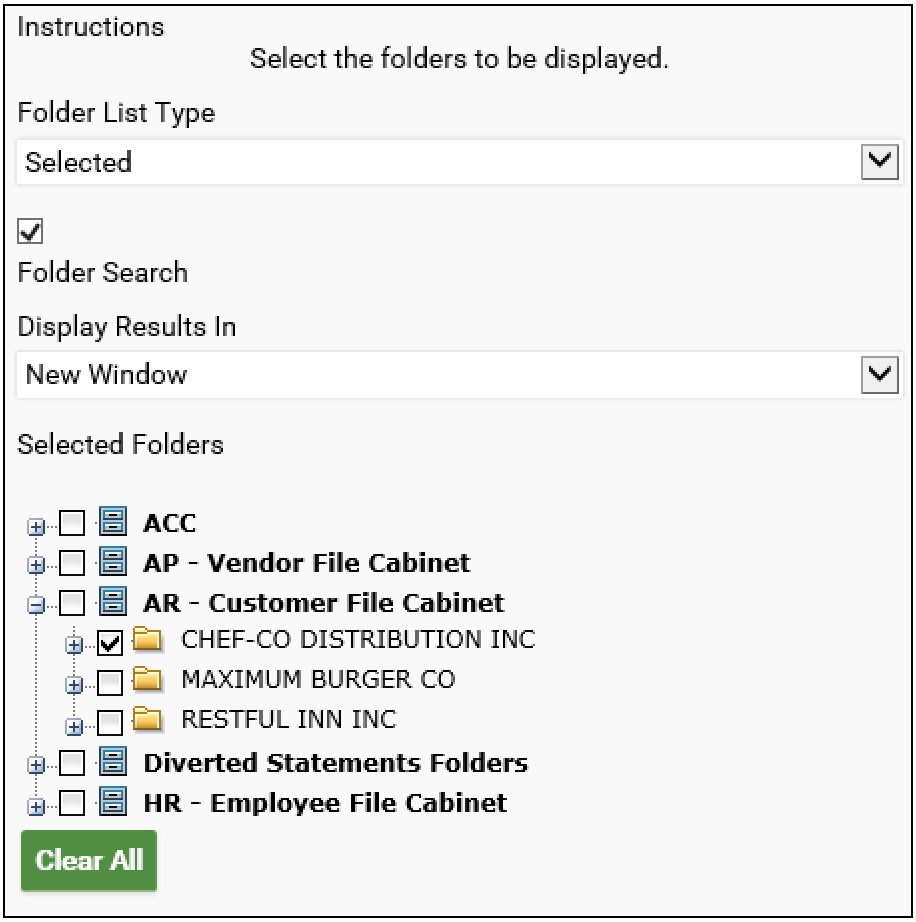
Note: If a folder is configured with the **Only Display Child Folders from Search** option, only the child folders will be displayed.

- If you individually select all child folders within a parent folder, the parent folder will be automatically selected.

Tip: Click the **Clear All** button to clear all current selections.

4. To allow users to also search for folders, select **Folder Search**.

5. From the **Display Results In** drop-down, select how the user's folder search results should be displayed. This option is available only if you selected **Folder Search**.
   - **New Window**—Folder search results are displayed in a new Folders window.
   - **Same Window**—Folder search results are displayed in a **Results** tab within the current portlet.



Note: The **Display Results In** setting does not apply to the folders you selected from the folder tree. These folders and their contents are displayed within the portlet.

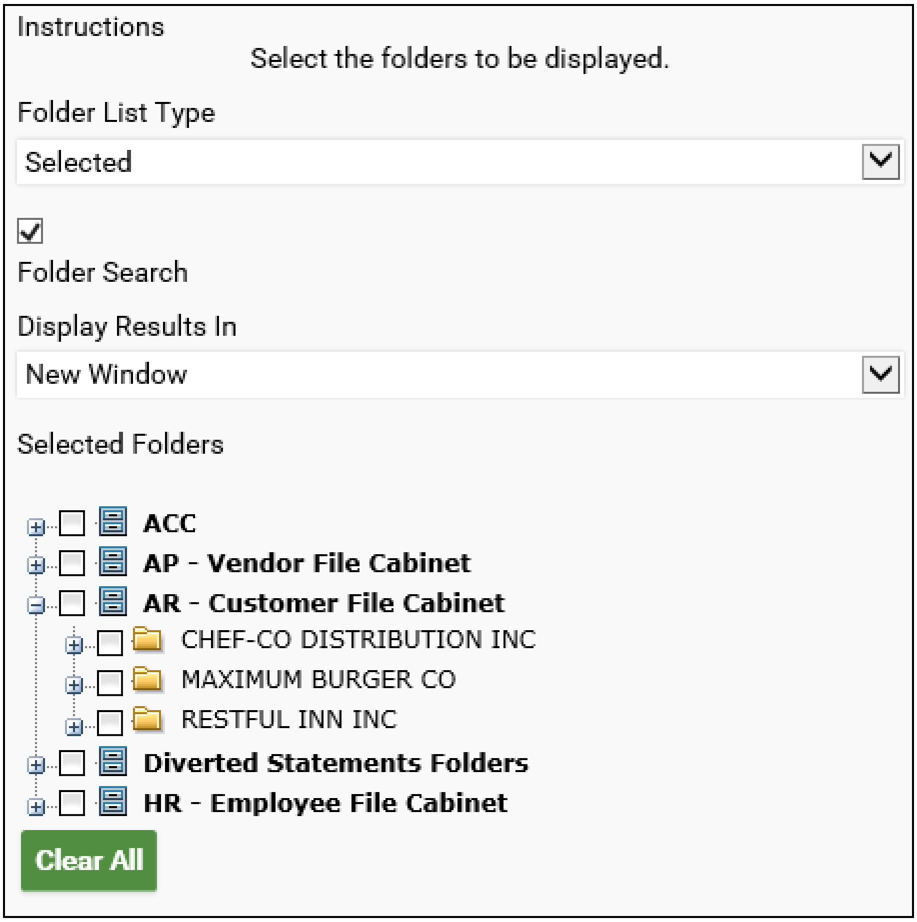
6. Click **Save**.

Enabling Folder Search Only

The folder portlet can be configured to display only the folder search feature. In this case, the portlet will display only results for folder searches conducted by the user.

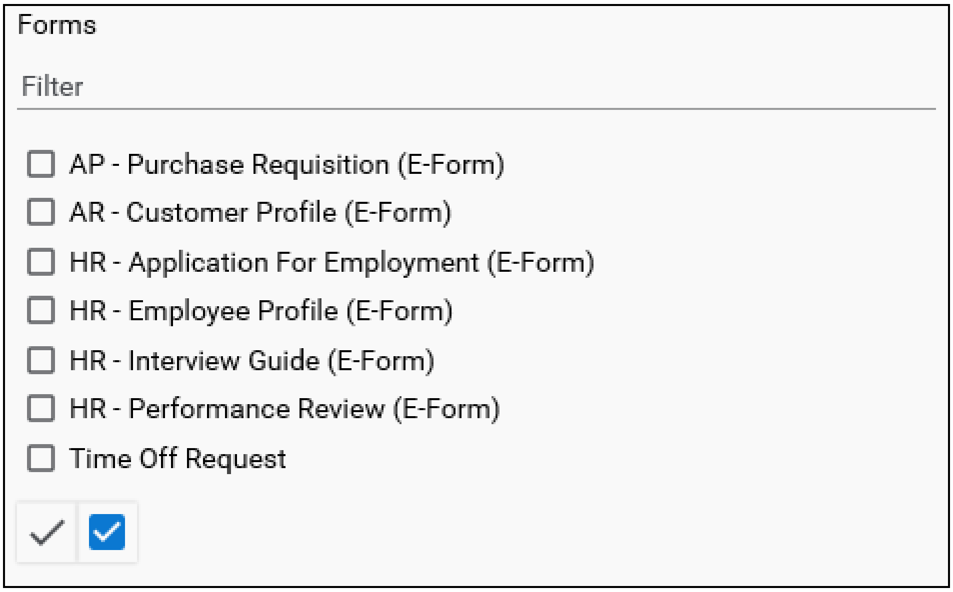
1. Under **Folder List Type**, select **Selected**.
2. Select **Folder Search** to allow users to search for folders.

3. Select how results should be displayed from the **Display Results In** drop-down.
   - **New Window**—Folder search results are displayed in a new Folders window.
   - **Same Window**—Folder search results are displayed in a **Results** tab within the current portlet.



4. Click **Save**.

Form Portlet



1. Select the E-Form or Unity Form you want to make available from this portlet by selecting the check box next to the title of the form.
2. If you want to add all of the available forms, click the **Select All** button.

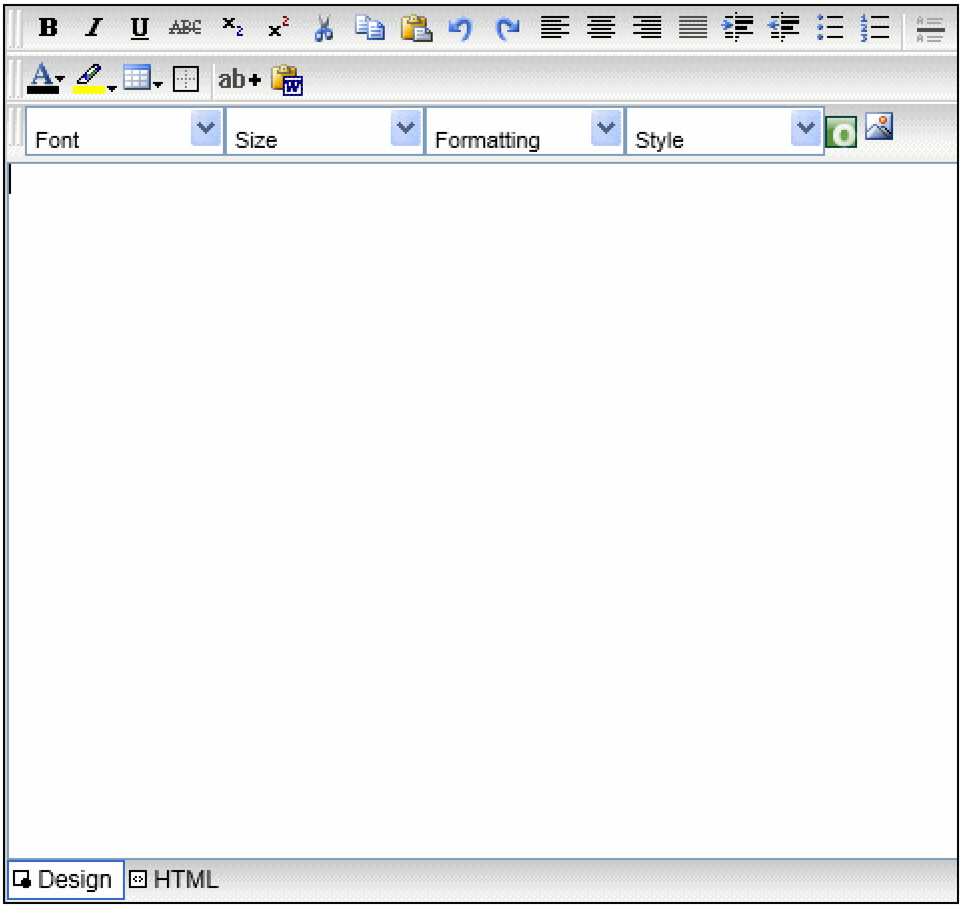
   If you want to remove all forms, click the **Clear Selected** button.

3. Click **Save**.

HTML Editor Portlet

HTML Editor portlets allow you to use HTML to display customized content such as Web links, OnBase links, images, tables, and formatted text.



1. From the lower-left corner, choose which mode you would like to work in:
   - **Design** - Allows you to work with Rich Text Format and use the toolbar buttons to quickly design and format the content within the portlet. This is ideal for users with limited or no understanding of HTML. It is also allows you to see how some of the content is going to be displayed.
   - **HTML** - Allows you to work freely within the workspace using HTML code. This is ideal for users experienced in using HTML. It is also ideal if you would like to paste HTML code into the portlet.

Note: For security purposes, the HTML Editor portlet filters out most scripts and elements containing event attributes. Some custom code, such as code used for embedding videos, is allowed.

Tip: You can switch between modes without losing content entered into the workspace.

2. If you selected Design mode, use the buttons in the toolbars to customize the portlet and display content in Rich Text Format. If you selected HTML mode, add HTML code to customize the portlet and display content in HTML code.
3. Click **Save**.

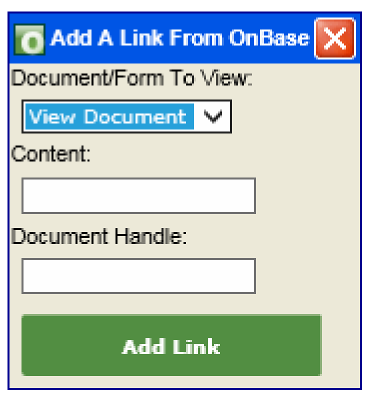
Adding a Link from OnBase

When using Design mode within the HTML Editor portlet, a number of buttons are available to quickly customize and design content within the portlet. The **Add a Link From OnBase** button allows you to insert links to OnBase objects and actions, including the ability to view a specific document, create a new E-Form, or create a new Unity Form from the portlet.

To add a link from OnBase:

1. From the HTML Editor portlet, click the **Add a Link From OnBase** button.

The **Add a Link From OnBase** dialog box is displayed.



2. Choose one of the following from the Document/Form To View drop-down list:
   - **View Document** - Adds a link to a specific document.
   - **Create E-Form** - Adds a link to create a new E-Form.
   - **Create Unity Form** - Adds a link to create a new Unity Form.
3. Enter **Content** for the linked object.
4. Depending on your selection in step 2, enter the appropriate information:
   - If you selected **View Document**, enter the **Document Handle** of the document you would like access to.
   - If you selected **Create E-Form**, enter the **Document Type Number** of the E-Form you would like access to.
   - If you selected **Create Unity Form**, enter the **Template #** of the Unity Form you would like access to.

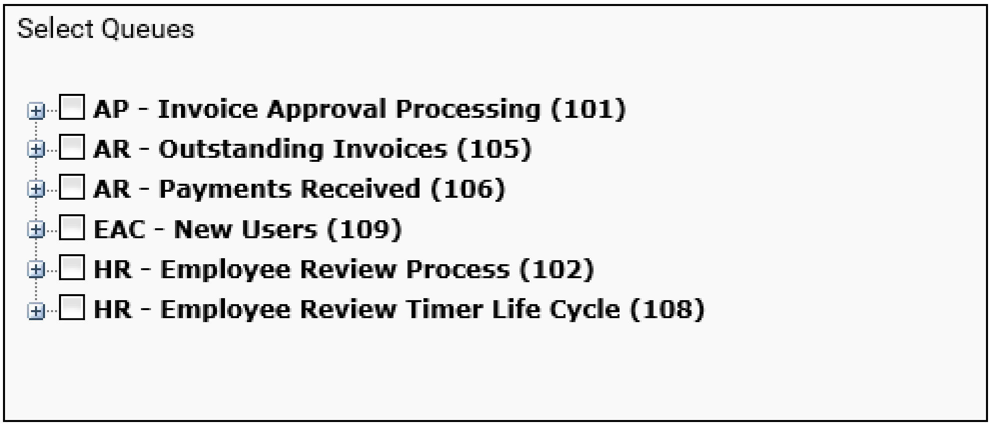
5. Click the **Add Link** button to add the link to the portlet.

SharePoint Dashboard Portlet

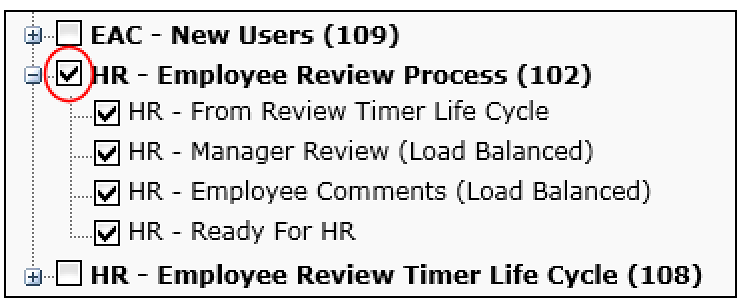
No additional configuration is needed for the SharePoint Dashboard portlet.

Note: This portlet requires a Site Provisioning for Microsoft SharePoint license.

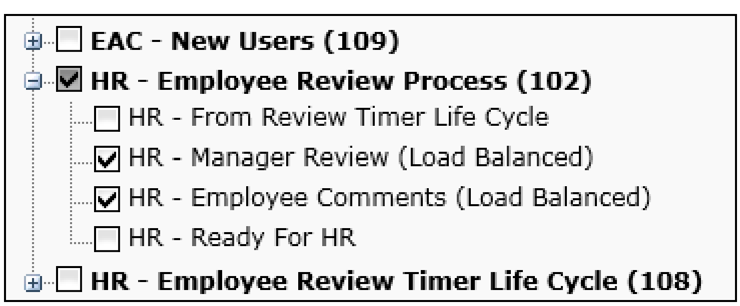
Workflow Portlet



1. Click a life cycle's name to display available queues.
2. To show all available queues in the life cycle, select the check box to the left of the life cycle's name.



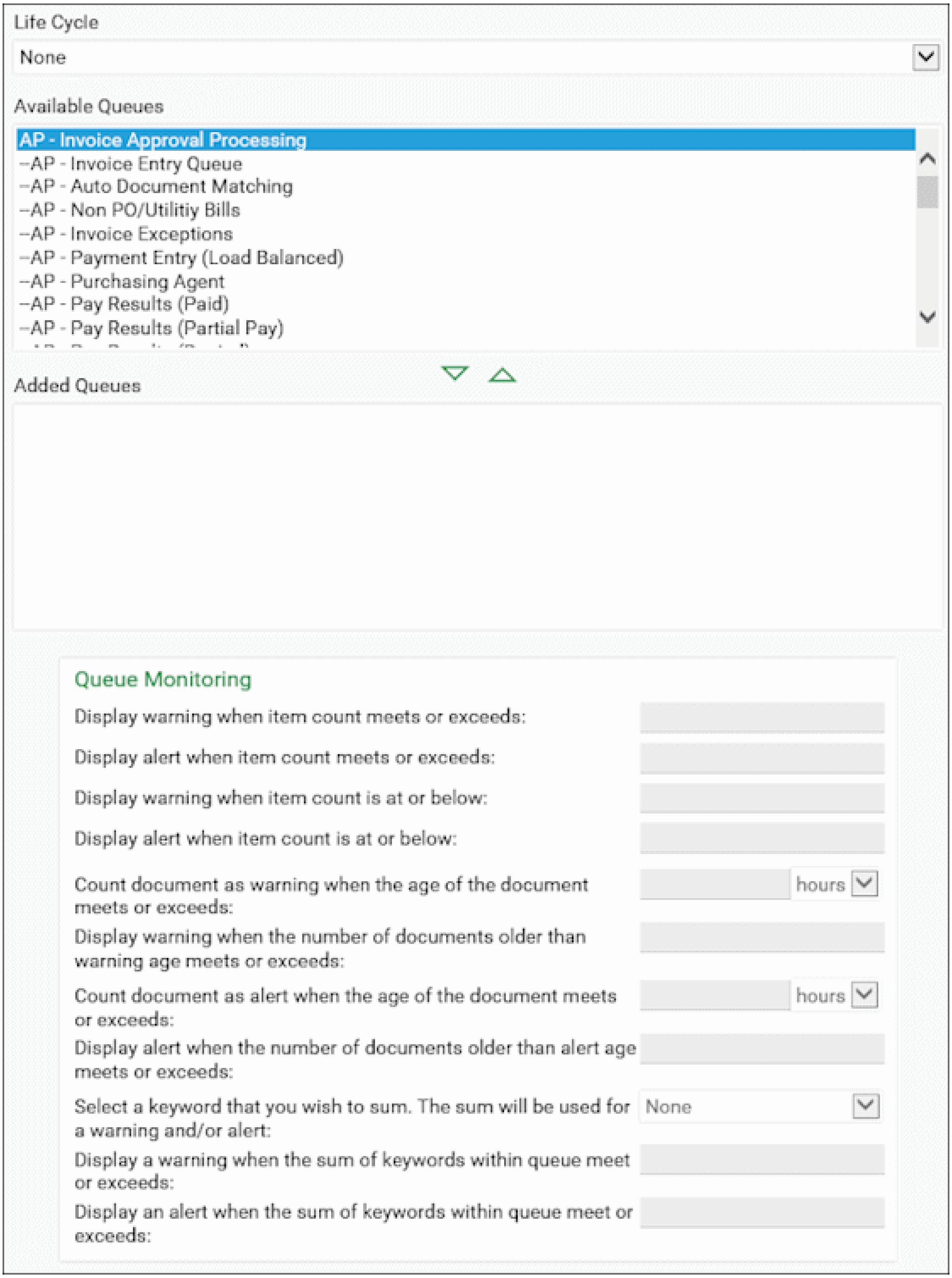
To show specific queues, select the check boxes to the left of the queues' names.



Note: Users can see only the contents of queues to which users have been granted rights in the Configuration module, regardless of the portlet configuration.

3. Click **Save**.

Workflow Dashboard Portlet



Note: This portlet requires a Business Activity Monitoring license. In addition, users must be granted appropriate rights to life cycles and queues.

1. Select the life cycle from the **Life Cycle** drop-down list. The life cycle is selected in the **Available Queues** list.
2. Select the queues you want summarized from **Available Queues**.
    - You can select a single queue or multiple. To select multiple queues, press **CTRL** as you click each queue's name.
    - To add all the queues in a life cycle, select the life cycle's name.
3. Click **Add**.

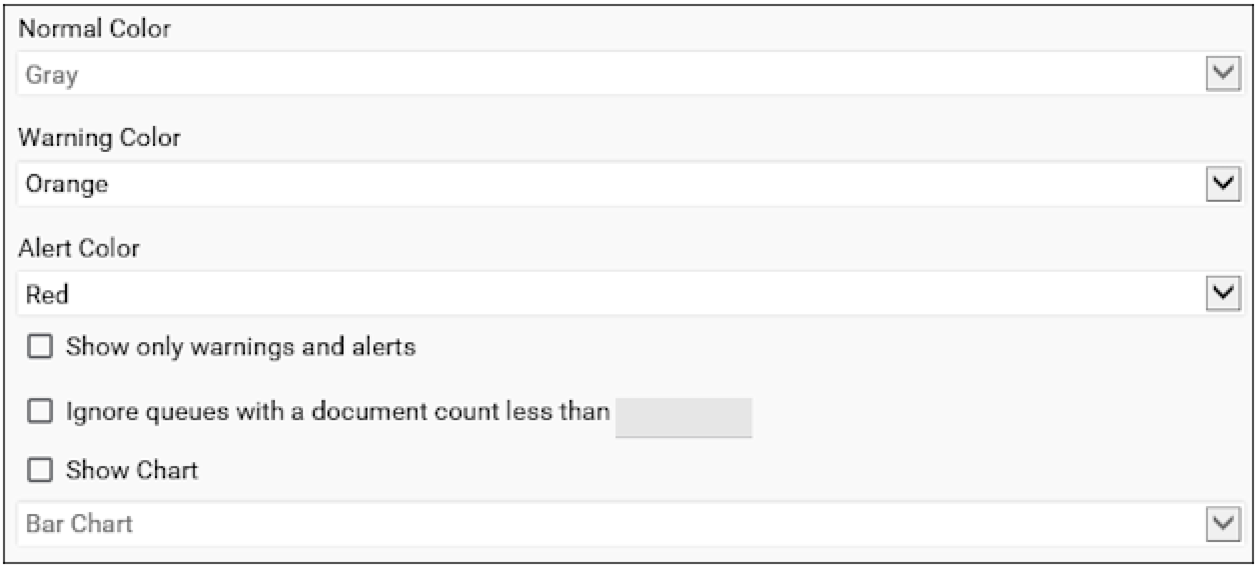
If you want to remove a queue or life cycle, click Remove.

4. Select a queue from **Added Queues**.
    - By default, any warning and alert values configured for the queue in OnBase Configuration are displayed in the monitoring fields. These values determine when a warning or alert is displayed for a queue.
    - When a warning or alert is triggered, an icon is displayed next to the queue name in the color you specify for warnings or alerts.
5. In the fields provided, enter the appropriate warning or alert values. Available fields are described in the following table:

Field	Description
Display warning when item count meets or exceeds	If a queue's document count is greater than or equal to these values, a warning or alert is triggered. For example, suppose the warning value is 10 and the alert value is 25. If the queue's document count is 15, a warning is triggered.
Display alert when item count meets or exceeds	
Display warning when item count is at or below	If a queue's document count is less than or equal to these values, a warning or alert is triggered. For example, suppose the warning value is 10 and the alert value is 5. If the queue's document count is 5, an alert is triggered.
Display alert when item count is at or below	

Field	Description
Count document as warning when the age of the document meets or exceeds	Enter the age threshold for documents that should trigger a warning or alert. If a document is the same age or older than the values specified, a warning or alert is triggered. These values can be provided in minutes, hours, days, or weeks. **Note:** In the next set of fields, you can configure a tolerance to allow a certain number of documents to match or exceed the value configured here without triggering a warning or alert.
Count document as alert when the age of the document meets or exceeds	
Display warning when the number of documents older than warning age meets or exceeds	Enter the maximum number of documents that can match or exceed the document age thresholds without triggering a warning or alert. For example, if a queue always contains five documents older than the warning or alert age threshold, and you do not want those documents taken into account when the portlet displays a warning or alert, enter **5** here.
Display alert when the number of documents older than alert age meets or exceeds	
Select a keyword type that you wish to sum. The sum will be used for a warning and/or alert	Select the Keyword Type whose combined values should be displayed in the portlet. For example, if **Amount** is selected, the Amount values on all documents in the queue are added together. In the portlet, the Keyword Type and sum are displayed next to the queue's name. In the next set of fields, you can configure the sum to trigger a warning or alert when it matches or exceeds a specific value.
Display a warning when the sum of keywords within queue meet or exceeds	Enter the sum that should trigger a warning or alert. Each field is limited to 10 characters. For example, suppose the warning value is 25000 and the alert value is 50000. If the combined value for the selected Keyword Type is 30000, a warning is triggered. **Note:** Floating Point Keyword Types are not supported for Keyword sums. Negative values are also not supported.
Display an alert when the sum of keywords within queue meet or exceeds	

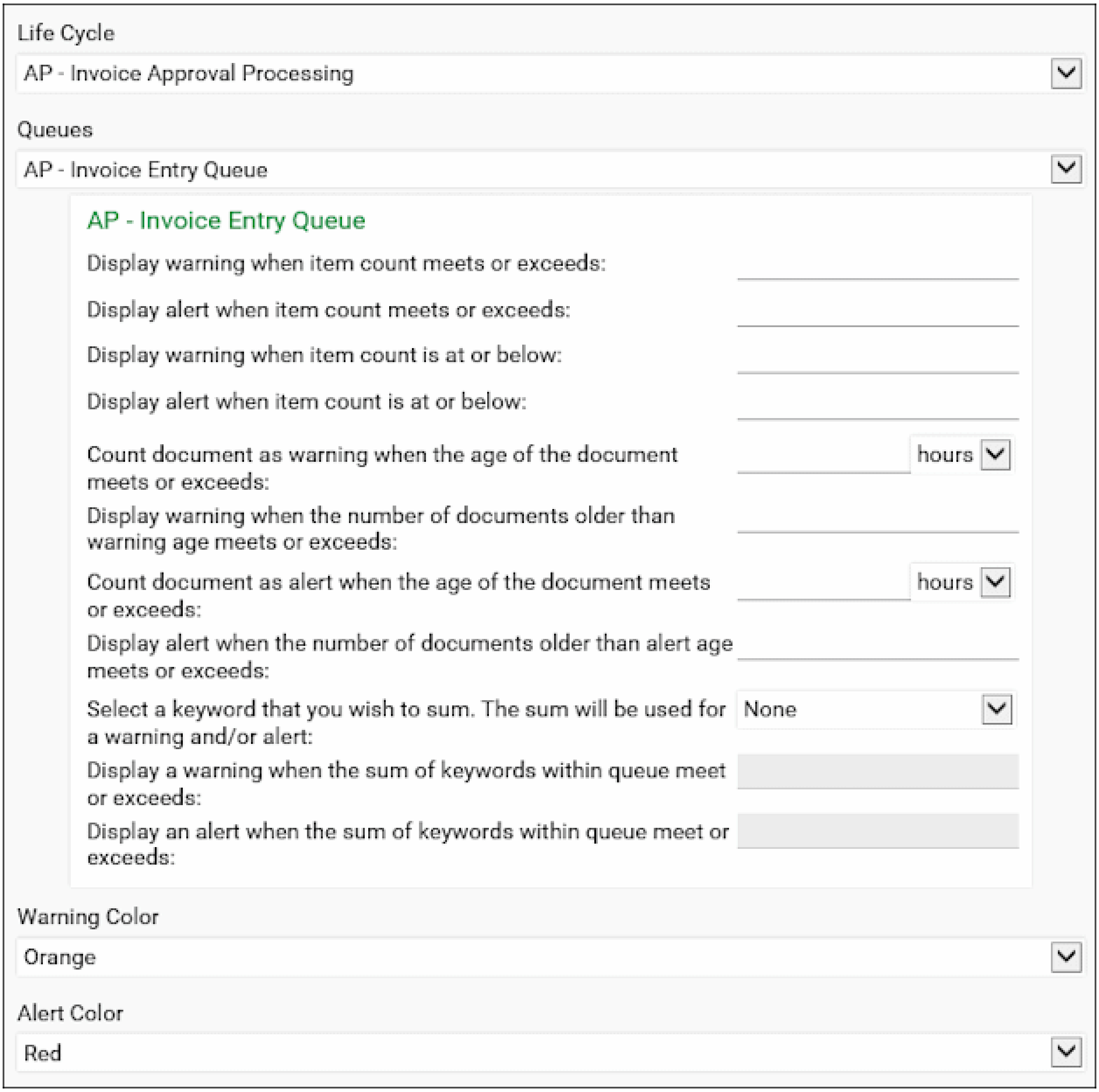
6. Configure the following display settings:



Option	Description
Normal Color	Select the color to use for queues that do not trigger a warning or alert.
Warning Color	Select the color to use for queues that trigger a warning.
Alert Color	Select the color to use for queues that trigger an alert.
Show only warnings and alerts	Select to display only queues that trigger a warning or alert.
Ignore queues with a document count less than	Select to hide queues with a document count less than the specified value. Enter the value in the field provided. **Note:** If this field is set to 0, then this setting is ignored. It will function the same as if the field were blank.
Show Chart	Select to display the queues as a chart. The following chart options are available: • **Bar Chart**: Displays queue counts as a horizontal bar graph. • **Column Chart**: Displays queue counts as a vertical bar graph.

7. Click **Save**.

Workflow Process Statistics Portlet



Before configuring the Workflow Process Statistics portlet, ensure that the graphic layout is configured for the life cycle you want to monitor. Graphic layouts are configured in OnBase Studio.

Note: This portlet requires a Business Activity Monitoring license.

Note: If a user has rights to a queue in a life cycle, the user can see all of the queues in the life cycle and the document counts for the queues. If a queue is configured with the **Hide Queue** setting in OnBase Configuration, the queue will not be displayed in the Process Statistics portlet.

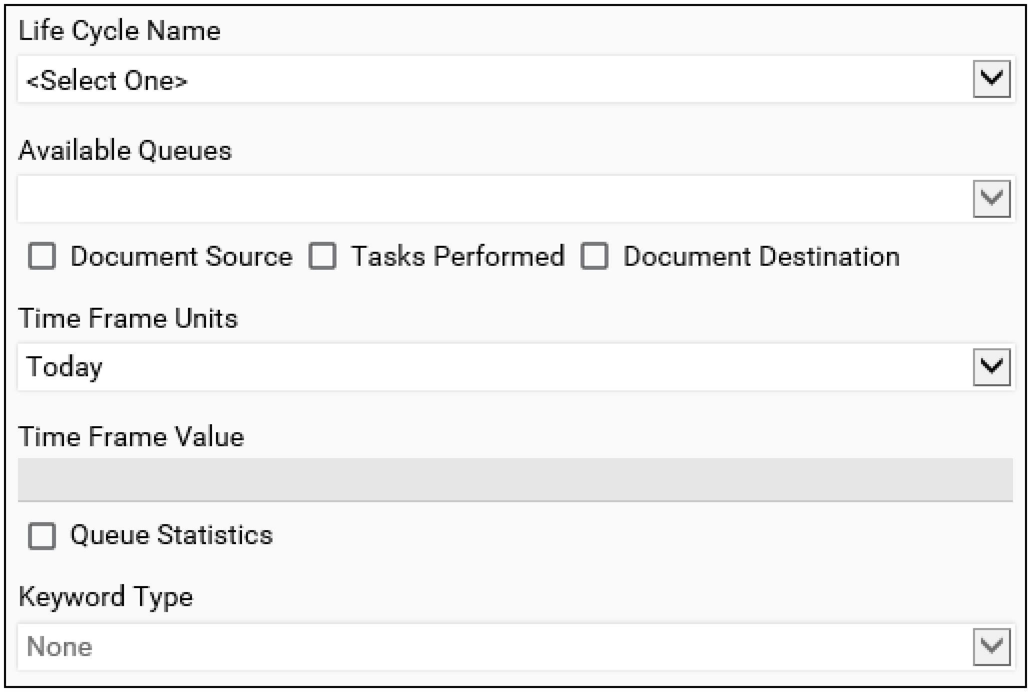
1. Select a life cycle from the **Life Cycle** drop-down list. The **Queues** list displays the queues in the selected life cycle.
2. Select a queue from the **Queues** drop-down list.
    - By default, any warning and alert values configured for the queue in OnBase Configuration are displayed in the monitoring fields. These values determine when a warning or alert is displayed for a queue.
    - When a warning or alert is triggered, an icon is displayed next to the queue name in the color you specify for warnings or alerts.
3. In the fields provided, enter the appropriate warning or alert values. Available fields are described in the following table:

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Display warning when item count meets or exceeds</td><td rowspan="2">If a queue’s document count is greater than or equal to these values, a warning or alert is triggered.
For example, suppose the warning value is 10 and the alert value is 25. If the queue’s document count is 15, a warning is triggered.</td></tr>
<tr><td>Display alert when item count meets or exceeds</td></tr>
<tr><td>Display warning when item count is at or below</td><td rowspan="2">If a queue’s document count is less than or equal to these values, a warning or alert is triggered.
For example, suppose the warning value is 10 and the alert value is 5. If the queue’s document count is 5, an alert is triggered.</td></tr>
<tr><td>Display alert when item count is at or below</td></tr>
<tr><td>Count document as warning when the age of the document meets or exceeds</td><td rowspan="2">Enter the age threshold for documents that should trigger a warning or alert. If a document is the same age or older than the values specified, a warning or alert is triggered. These values can be provided in minutes, hours, days, or weeks.
Note: In the next set of fields, you can configure a tolerance to allow a certain number of documents to match or exceed the value configured here without triggering a warning or alert.</td></tr>
<tr><td>Count document as alert when the age of the document meets or exceeds</td></tr>
</table>

Field	Description
Display warning when the number of documents older than warning age meets or exceeds	Enter the maximum number of documents that can match or exceed the document age thresholds without triggering a warning or alert. For example, if a queue always contains five documents older than the warning or alert age threshold, and you do not want those documents taken into account when the portlet displays a warning or alert, enter **5** here.
Display alert when the number of documents older than alert age meets or exceeds	
Select a keyword type that you wish to sum. The sum will be used for a warning and/or alert	Select the Keyword Type whose combined values should be displayed in the portlet. For example, if **Amount** is selected, the Amount values on all documents in the queue are added together. In the portlet, the Keyword Type and sum are displayed next to the queue's name. In the next set of fields, you can configure the sum to trigger a warning or alert when it matches or exceeds a specific value.
Display a warning when the sum of keywords within queue meet or exceeds	Enter the sum that should trigger a warning or alert. Each field is limited to 10 characters. For example, suppose the warning value is 25000 and the alert value is 50000. If the combined value for the selected Keyword Type is 30000, a warning is triggered. **Note:** Floating Point Keyword Types are not supported for Keyword sums. Negative values are also not supported.
Display an alert when the sum of keywords within queue meet or exceeds	

4. Select the **Warning Color** to use for queues that trigger a warning.
5. Select the **Alert Color** to use for queues that trigger an alert.
6. Repeat for each queue in the life cycle.
7. Click **Save** when finished.

Workflow Queue Activity Portlet



The Workflow Queue Activity portlet uses information stored in the Workflow log. If the Workflow log has been purged within the time frame you are monitoring, the information displayed may not be accurate.

In OnBase Configuration, ensure that logging is not disabled on the queue which contains the task that you want to monitor. Ensure **Log Execution** is enabled for each top level Task List that you wish to monitor.

Note: This portlet requires a Business Activity Monitoring license. In addition, users must be granted appropriate rights to life cycles and queues.

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1. Select the life cycle from the **Life Cycle Name** drop-down list.
2. Select the queue you want to monitor from the **Available Queues** drop-down list.

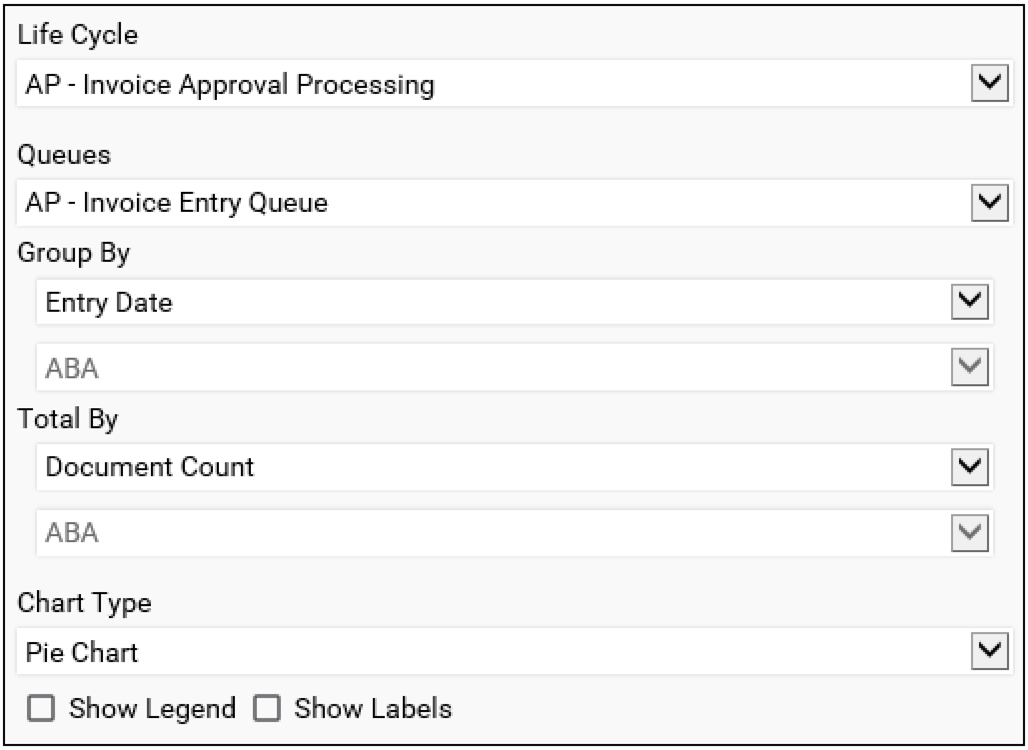
3. Select the information you want the portlet to display. You must select at least one option.
   - **Document Source** - Adds a pane displaying where the documents in the queue transitioned from. The pane displays transitional queues only. The source is not displayed for documents entering the selected queue through an import process or through document import.
   - **Tasks Performed** - Adds a pane displaying the tasks performed at the task list level, including system work, timer work, and ad-hoc user task lists. Actions and rule-level work are not included. A disabled task is counted if there is an attempt to execute it (e.g., through system or timer work). Because the Workflow Queue Activity portlet uses the Workflow log, **Log Execution** must be enabled for the tasks in the Configuration module.
   - **Document Destination** - Adds a pane displaying where the documents in the selected queue transitioned to. The pane displays transitional queues only. The destination is not displayed for documents transitioned out of the life cycle or deleted upon exiting the queue.
4. Select the time frame you want to monitor.
   - Select **Today** to display all activity that occurred on the current date.
   - Select **Time Frame** to configure the period you want to monitor. From the **Time Frame Units** drop-down, select **Minutes**, **Hours**, **Days**, or **Weeks**. In the **Time Frame Value** field, enter the number of minutes, hours, days or weeks you want to monitor.
5. Select **Queue Statistics** to include a pane displaying the queue's name, document count, and oldest entry date.
6. To display a Keyword Type's combined value for all documents in the queue, select the **Keyword Type** from the drop-down list. This field is available only if the **Queue Statistics** option is selected.

   For example, if **Amount** is selected, the Amount values on all documents in the queue are added together. The portlet will display the Keyword Type and combined value from all documents in the queue.

Note: Floating Point Keyword Types are not supported for Keyword sums.

7. Click **Save**.

Workflow Queue Filter Portlet



Note: This portlet requires a Business Activity Monitoring license. In addition, users must be granted appropriate rights to life cycles and queues.

1. Select the life cycle from the **Life Cycle** drop-down list.
2. Select the queue you want summarized from the **Queues** drop-down list.
3. Select how you want the information to be grouped in the **Group By** drop-down:
    - **Entry Date** groups documents by the date they entered the queue. Time of entry is not reflected; if all documents entered the queue on the same date but at different times, all documents are grouped together.
    - **Assigned To** groups documents according to the user they are assigned to. This option is useful for load-balanced queues.

- **Keyword Type** groups documents that have the same value for a selected Keyword Type. After selecting this option, select the Keyword Type to group by from the drop-down list.

Note: If there are multiple instances of a Keyword Type on the documents, there may be multiples instances of the same value in the results.

Note: You cannot group by Keyword Types that have a Floating Point data type.

4. Select the information to be totaled for each group in the **Total By** drop-down. Groups are determined by the option selected in the previous step.
   - **Document Count** totals the number of documents in each group.
   - **Keyword Sum** totals a Keyword Type's combined value for all documents in the queue. After selecting **Keyword Sum**, select the Keyword Type you want totaled from the drop-down list.

     For example, if **Amount** is selected, the Amount values on all documents in a group are added together. The portlet will display the Keyword Type and combined value from all documents in the queue.

Note: Alphanumeric, Currency, and Numeric data type Keyword Types are supported for the **Keyword Sum** option. If you use an Alphanumeric Keyword Type, the values must consist of all numbers. This option does not support Specific Currency, Date, Date/Time, or Floating Point data type Keyword Types. Keyword Types that have the Numeric 20 data type may not be displayed correctly if they are greater than 9999999999999999999.

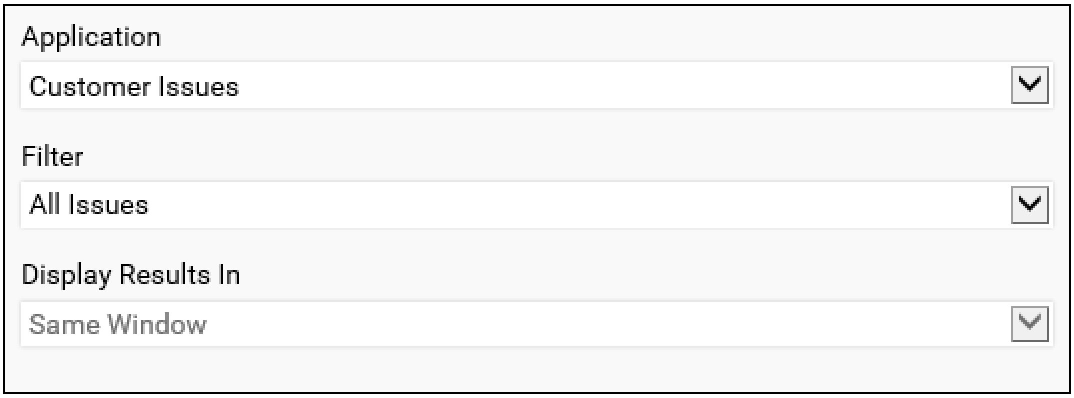
5. Select a **Chart Type**.
   - **Bar Chart** displays the information in a horizontal bar graph.
   - **Pie Chart** displays the information in a pie graph.
   - **Column Chart** displays the information in a vertical bar graph.

Note: Colors displayed in charts are assigned each time the portlet is refreshed in the client and cannot be permanently assigned.

6. To include a legend describing the chart, select **Show Legend**.
7. To display labels on the chart, select **Show Labels**.

   If neither **Show Legend** nor **Show Labels** is selected, users will be unable to read the chart.
8. Click **Save**.

WorkView Filter Portlet



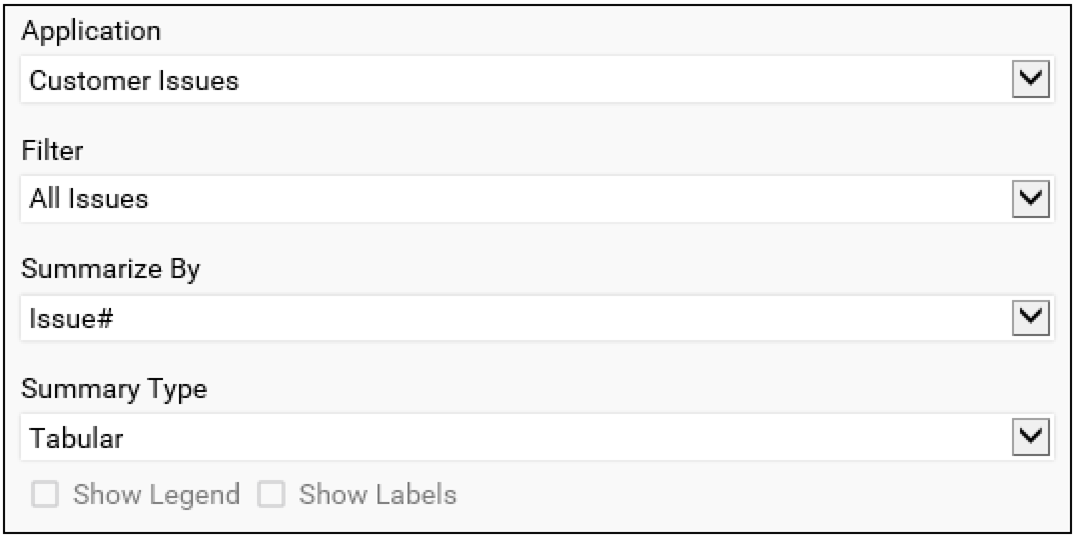
1. Select the appropriate **Application** from the drop-down list.
2. Select the appropriate **Filter** from the drop-down list.

Note: In order for a filter to appear in the drop-down list, it must be added to a Filter Bar that the user has permission to access.

3. If the **Display Results In** drop-down list is available, select whether filter results should be displayed in the **Same Window** or in a **New Window**. Otherwise, skip to the next step.

   This drop-down is available only if the selected filter contains User Entry Constraints.
4. Click **Save**.

WorkView Summary Portlet



1. Select the **Application** on which to base the summary.
2. Select the **Filter** from which to pull summary data.

Note: In order for a filter to appear in the drop-down list, it must be added to a Filter Bar that the user has permission to access.

3. Select the attribute that the summary will represent from the **Summarize By** drop-down list.
4. Select a **Summary Type** from the drop-down list.
   - The **Tabular** type displays data in a table format.
   - The **Pie Chart** option displays data in a pie graph. Additional options become available, allowing you to configure the chart.
   - The **Bar Chart** option displays the information in a bar graph. Additional options become available, allowing you to configure the chart.

   If you select **Tabular**, skip to step 7, otherwise continue to the next step.
5. To display a legend for the chart, select **Show Legend**.
6. To display labels on the chart, select **Show Labels**.
7. Click **Save**.

Exporting and Importing StatusView Layouts

Using the Export and Import Wizards in the Configuration module, you can export and import StatusView layouts from one database to another. For more information about exporting and importing in the Configuration module, see the **System Administration** module reference guide.

The following portlet type information should be considered before exporting and importing StatusView layouts:

Portlet Type	Export and Import Considerations
Custom Query	Exports and imports all associated Custom Queries.
Document Knowledge Transfer	Exports either a specific configured reading group or All Reading Groups. The ID of a specific reading group will be updated on import. **Note:** Reading groups can only be mapped.
Envelope	The configuration for this portlet is cleared upon import.
External Links	Exports and imports any configured links. **Note:** If a link is dependent on environment-specific URLs, that link needs to be updated manually.
File Upload	Exports and imports the configured Document Type.
Forms	Exports and imports all associated E-Forms and Unity Forms.
Foldering	Exports and imports all associated Folder Types and Keyword Types. If the portlet is configured to display a Foldering instance, the configuration is cleared upon import and will need to be manually updated.
HTML Editor	The HTML is exported and imported. **Note:** Any E-Form IDs need to be updated in the HTML manually.
SharePoint Dashboard	Exports and imports all associated references to SharePoint sites.
Workflow	Exports and imports all associated life cycles, queues, and any dependencies.
Workflow Dashboard	Exports and imports all associated life cycles, queues, and any dependencies.
Workflow Process Statistics	Exports and imports all associated life cycles, queues, and any dependencies.
Workflow Queue Filter	Exports and imports all associated life cycles, queues, and any dependencies.
WorkView Filter	Exports and imports the associated application and filter.

Portlet Type	Export and Import Considerations
WorkView Summary	Exports and imports the associated application and filter. **Note:** Attributes cannot be mapped.

OnBase®

Foundation EP5

StatusView

User Guide

Foundation EP5

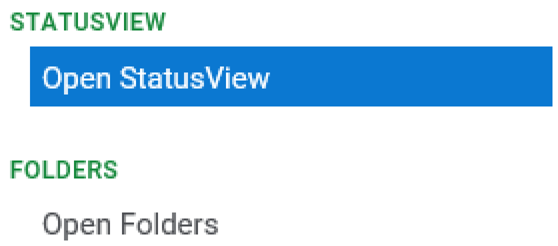
Usage

The following topics describe how to view layouts and work with available portlets:

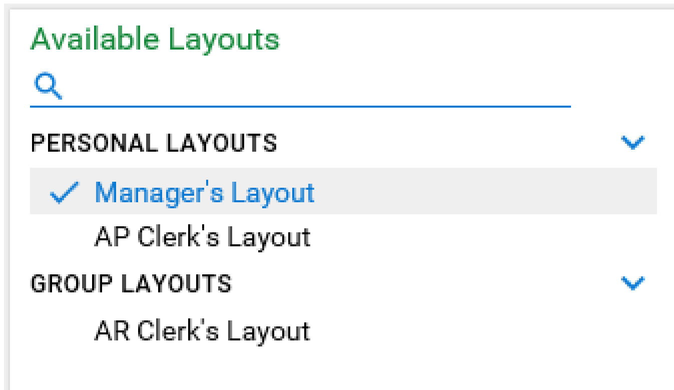
Viewing Layouts

To view a layout in StatusView:

8. Select **Open StatusView** from the **Main Menu** list in the OnBase Web Client.

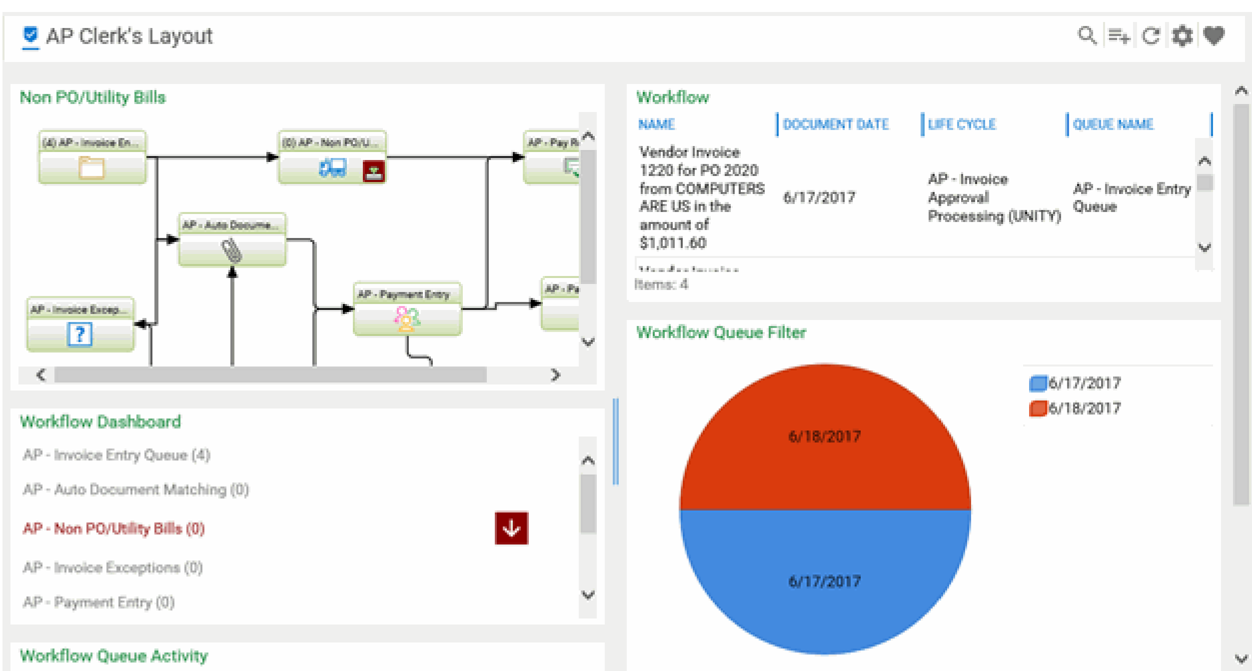


9. The **Available Layouts** list is displayed. All layouts you currently have rights to are listed under **Personal Layouts** and **Group Layouts**.



Note: Depending on your privileges, you may see only one of these headings in the navigation panel.

10. Select a layout to display it in the right pane.



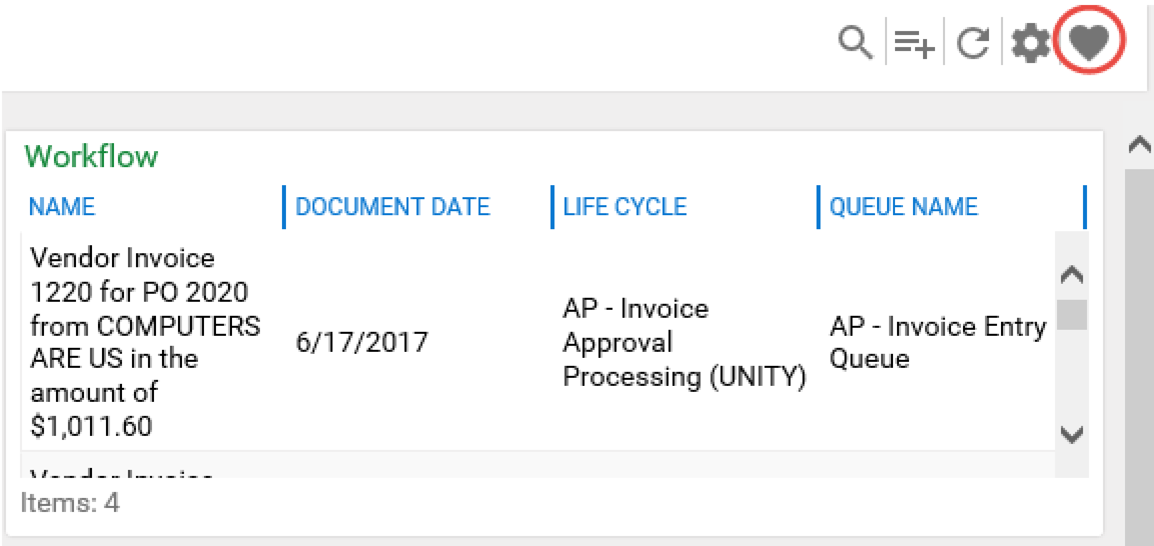
Note: You may be unable to open documents if a license is unavailable. For example, a license is required for displaying the Web Workflow page or a WorkView object. If no licenses are available, you may still view portlets in your layout, but you will be unable to open documents.

Bookmarking a Layout

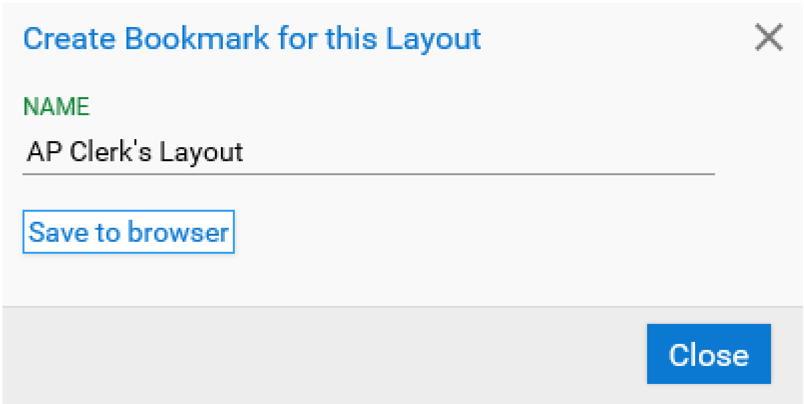
Note: This functionality is only available when using Internet Explorer or Firefox.

For easy access, you can add a layout to your browser's bookmarks or favorites menu.

1. Open the layout you want to bookmark.
2. Click the **Bookmark this layout in your web browser** button.



3. The Create Bookmark for this Layout dialog is displayed.



4. Type a name for the bookmark in the field provided.
5. Click the **Save to browser** button. The browser displays its dialog box for adding the layout to your **Bookmarks** or **Favorites** menu.
6. Complete the bookmark (or favorite) creation process as described in your browser's help files.

Refreshing Layouts & Portlets

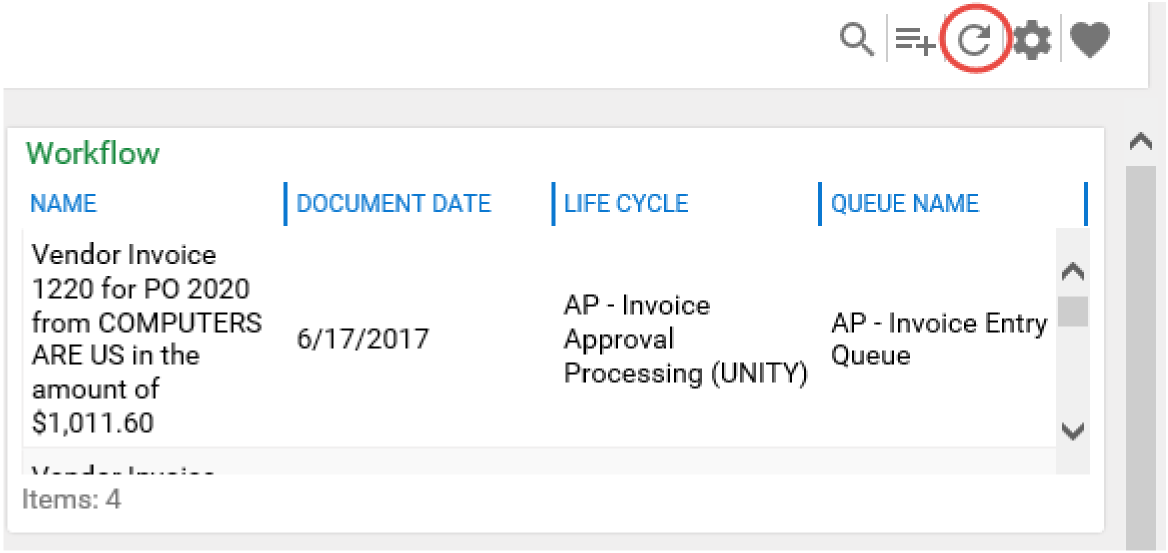
See the following topics to manually refresh an entire layout or an individual portlet:

- Refreshing a Layout on page 89
- Refreshing a Portlet on page 90

Note: When the Document Knowledge Transfer portlet is refreshed manually or automatically, the entire layout also is refreshed. This behavior occurs because actions performed in this portlet can affect other portlets in the layout.

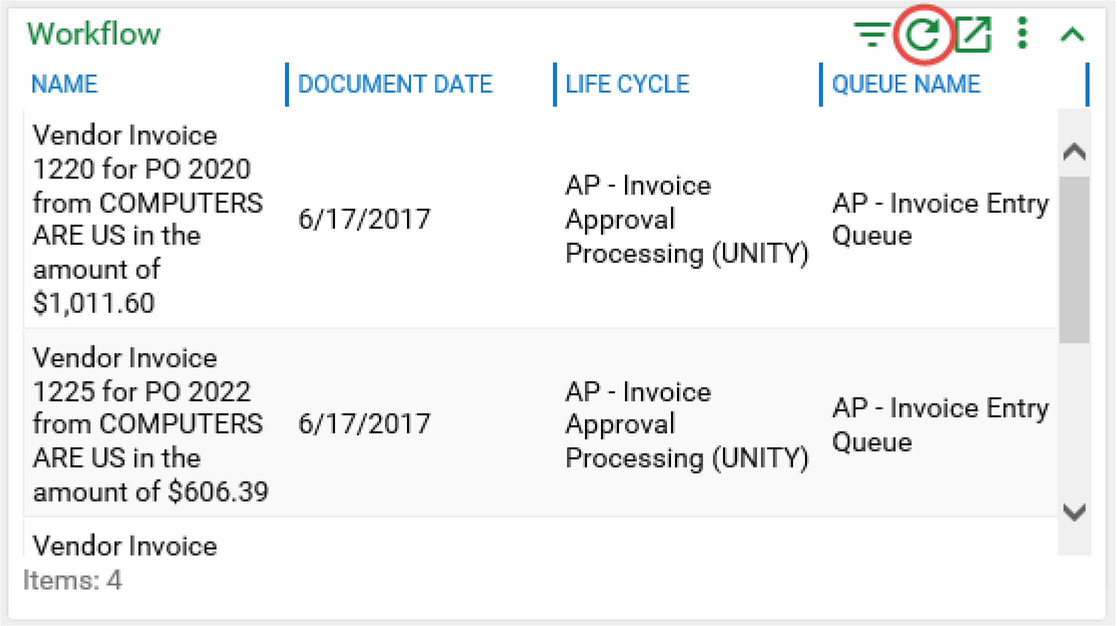
Refreshing a Layout

Remember to refresh your layout periodically to display the most up-to-date information from OnBase. To refresh the layout's contents, click the **Refresh Layout** button in the layout's title bar.



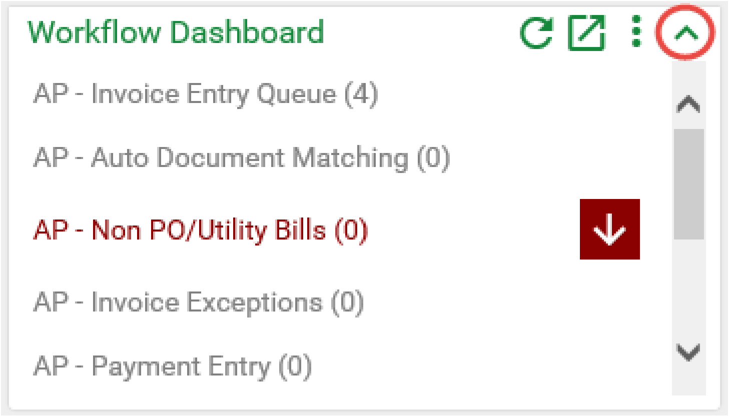
Refreshing a Portlet

To refresh the contents of a portlet without refreshing the entire layout, click the **Refresh** button in the upper-right corner of the portlet.



Collapsing a Portlet

You can collapse portlets by clicking the **Collapse** button in the upper-right corner of the portlet.



To expand a collapsed portlet, click the **Collapse** button.

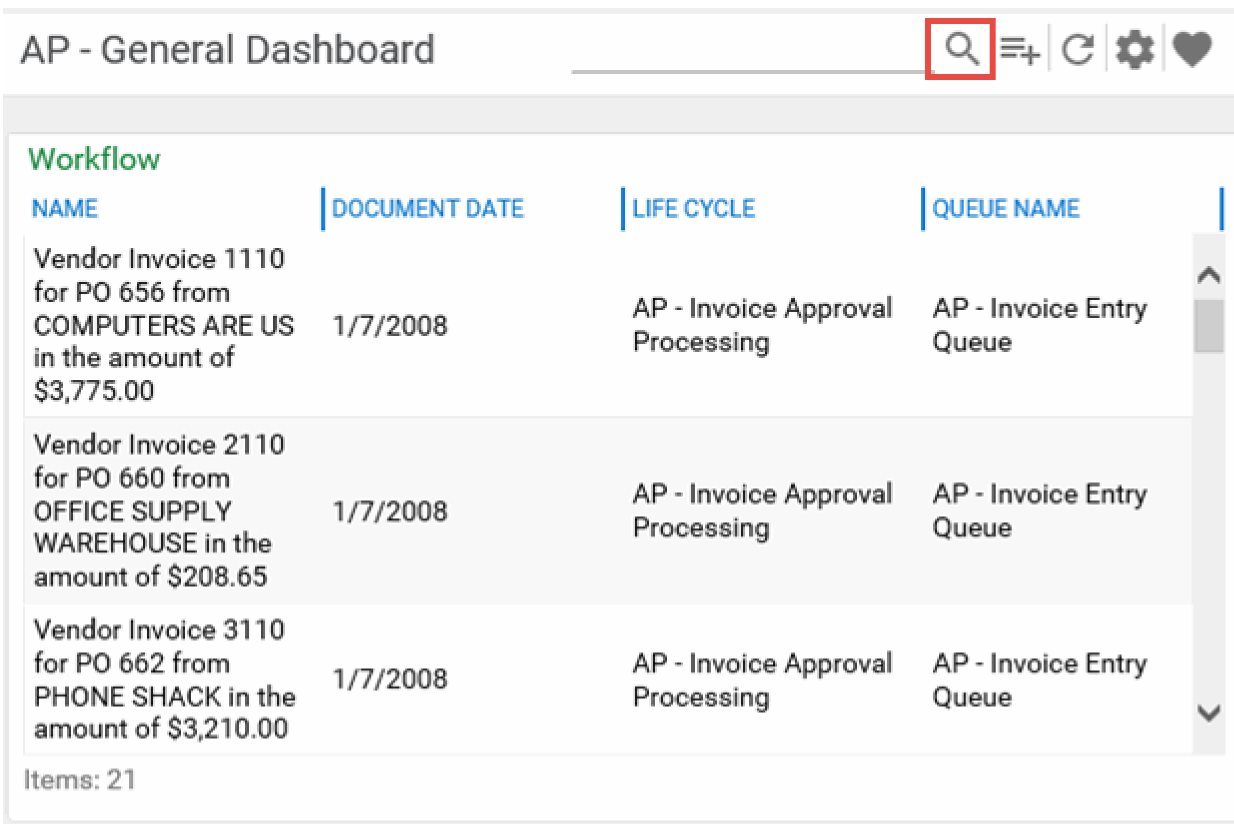
Filtering Documents in a Layout

To find a specific document in the current layout, use filtering. Filtering allows you to filter the following portlet types simultaneously:

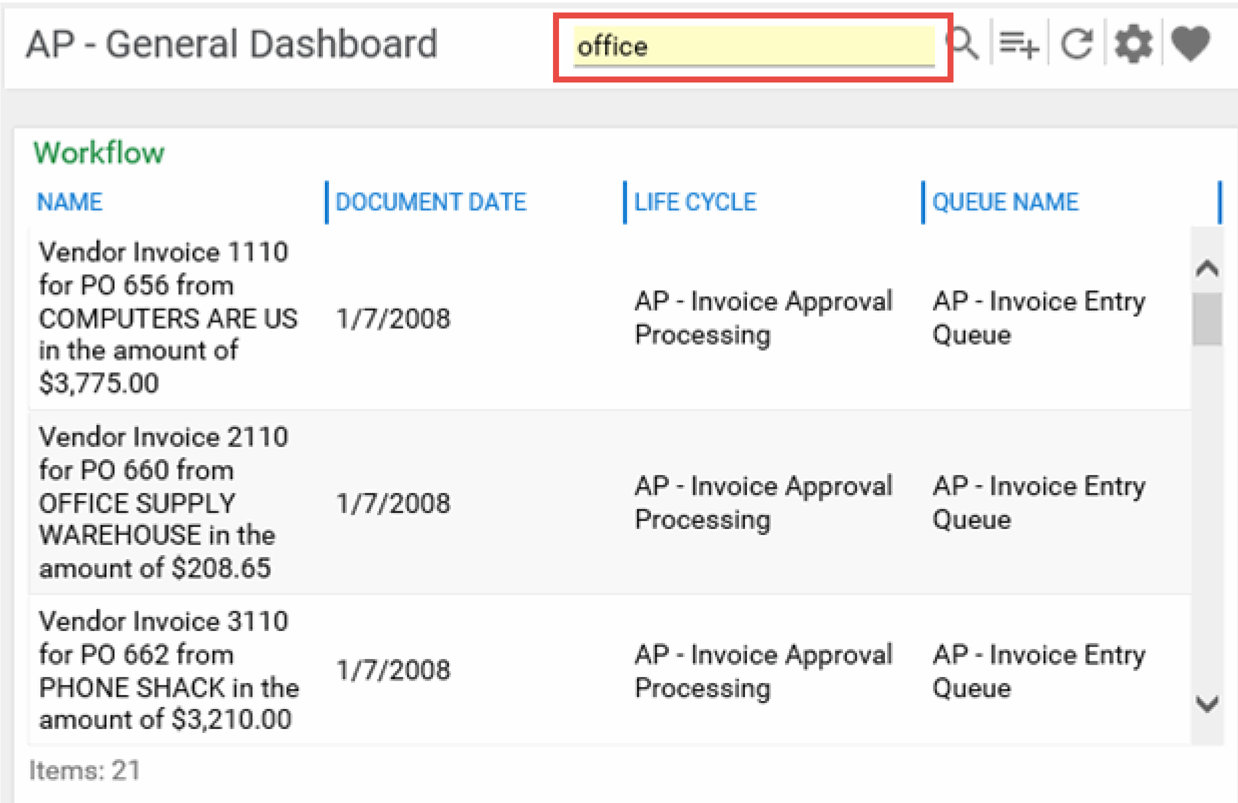
- Custom Query
- Document Knowledge Transfer
- Forms
- Workflow
- WorkView Filter

To filter these portlet types, use the following procedure:

1. Open the layout you want to filter.
2. Click in the layout pane to ensure it is the active area of the window.
3. Click the filter button or press **CTRL+F**. The filter field is displayed.



4. Type the text you want to filter by in the field provided.
    - Only text in the first column of eligible portlets will be searched.
    - Wildcards are not supported.



5. Press **Enter**. The applicable portlets are filtered to show matching documents or objects.
6. To remove the filter from all affected portlets, refresh the layout. See Refreshing a Layout on page 89.

    To remove the filter from a specific portlet, refresh the portlet. See Refreshing a Portlet on page 90.

Working with StatusView Portlets

Every Portlet Type has functionality specific to the feature or module it is accessing. The following StatusView Portlet Types are available:

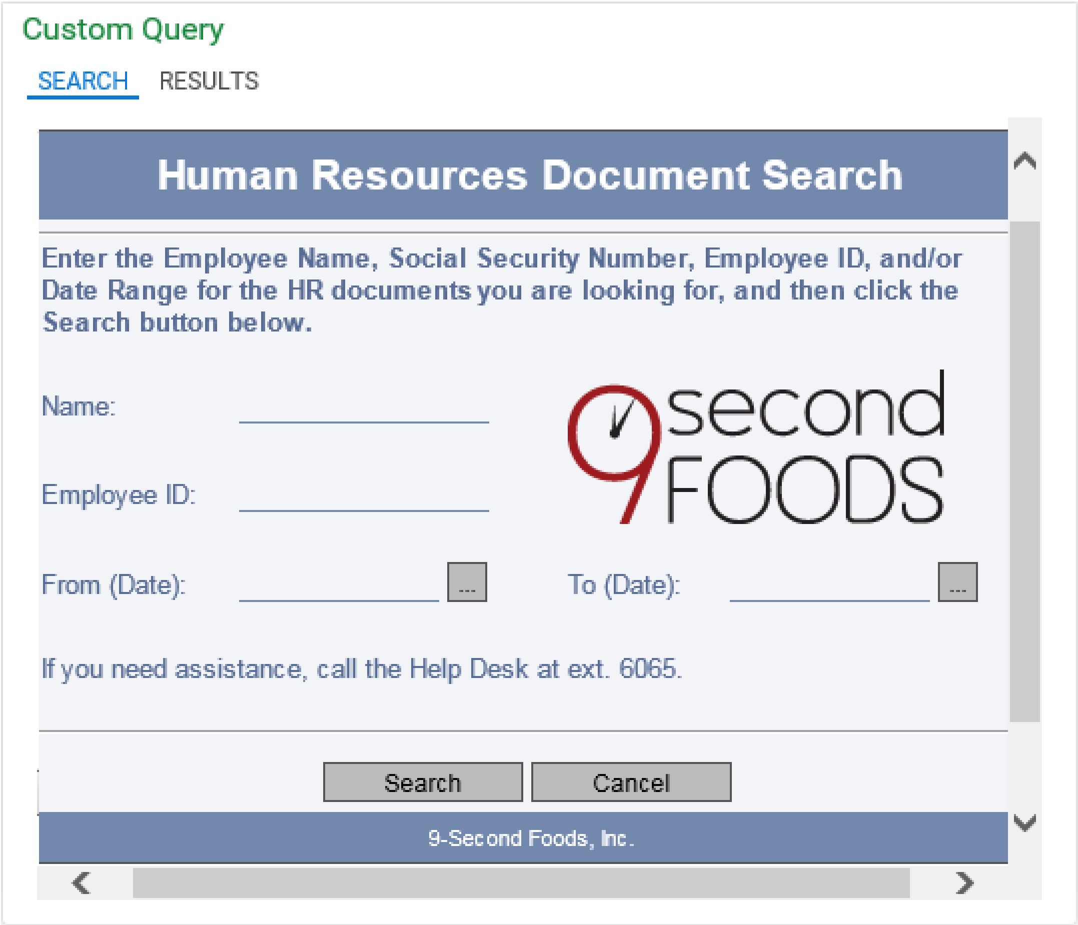
- Custom Query Portlets on page 93
- Document Knowledge Transfer Portlets on page 96
- Envelope Portlets on page 97
- External Links Portlet on page 98
- File Upload Portlet on page 99
- Folder Portlets on page 101

- Form Portlets on page 105
- HTML Portlets on page 105
- SharePoint Site Dashboard Portlets on page 106
- Workflow Portlets on page 107
- Workflow Dashboard Portlets on page 110
- Workflow Process Statistics Portlets on page 111
- Workflow Queue Activity Portlets on page 113
- Workflow Queue Filter Portlets on page 115
- WorkView Filter Portlets on page 115
- WorkView Summary Portlets on page 119

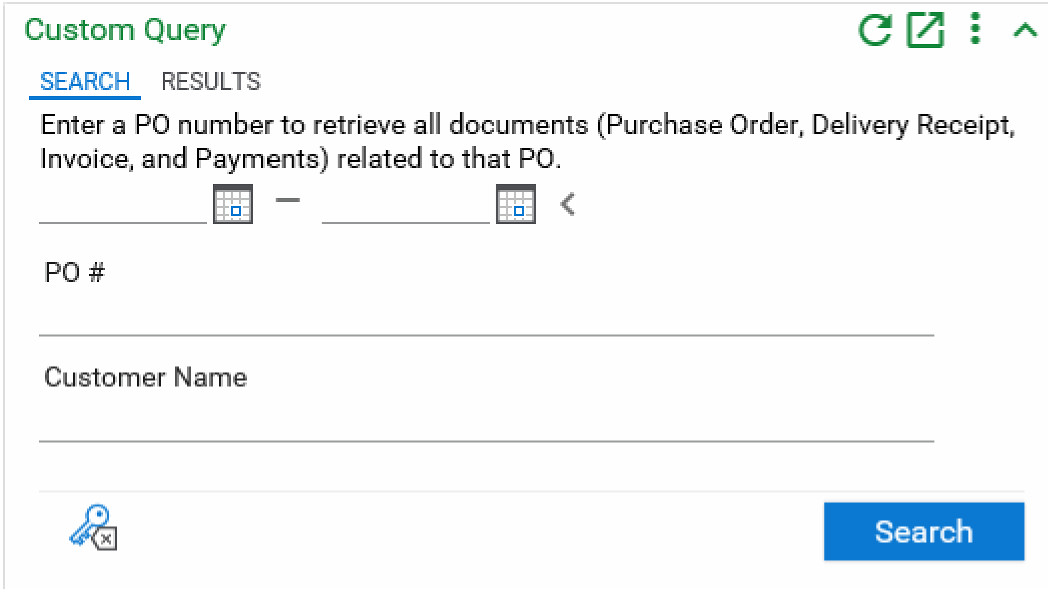
Custom Query Portlets

Custom query portlets display the selected custom query or pre-defined custom query results. The following examples show HTML and standard custom queries that require data entry:

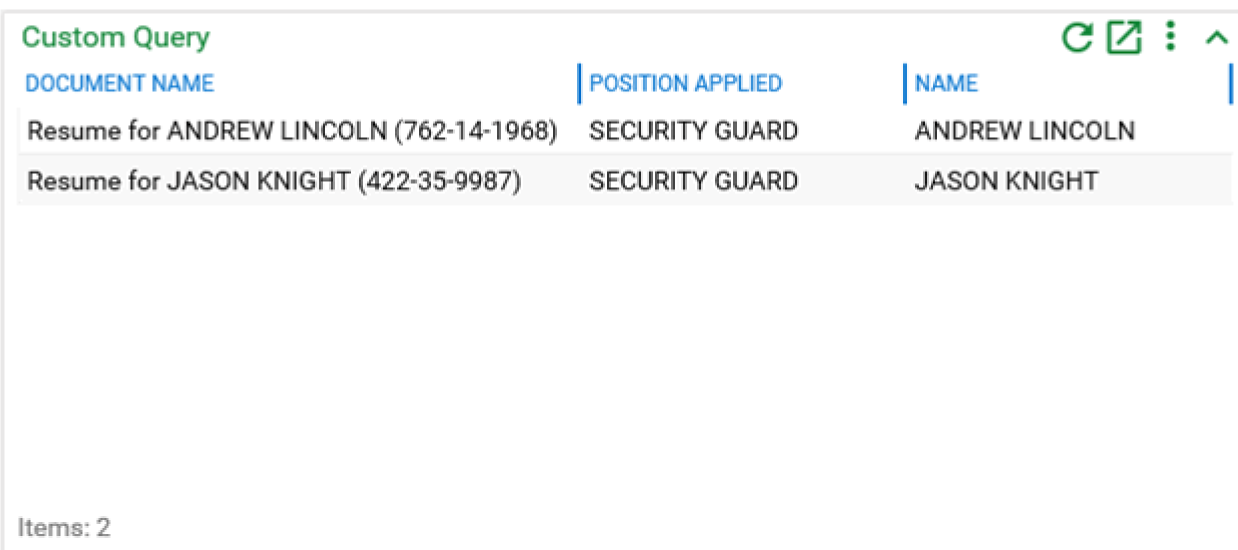
HTML custom query:



Standard custom query:

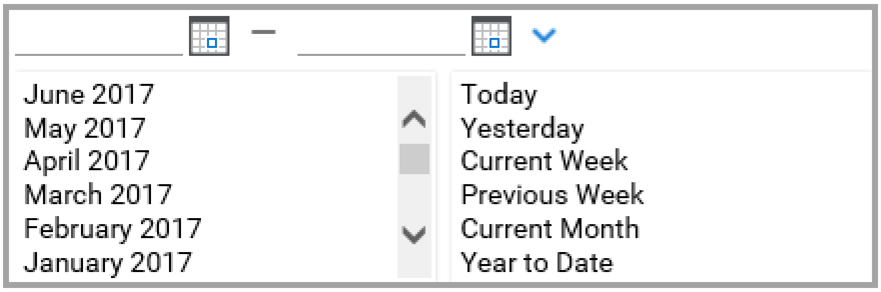


Some custom query portlets may automatically display a results list based on pre-configured parameters, as shown in the following example. Click a column header to sort results. Double-click a document to open it.



If the custom query allows you to enter your own parameters, perform the following steps:

1. Enter your parameters in the field provided.
2. If the custom query allows date-based searches, specify a date range by clicking the calendar buttons next to the **From Date** and **To Date** fields.
   - The availability of calendar buttons depends on the custom query's configuration. A default date range may already be provided.
   - Click the arrow button to the right of the calendar buttons for extended date options, as shown in the following example:



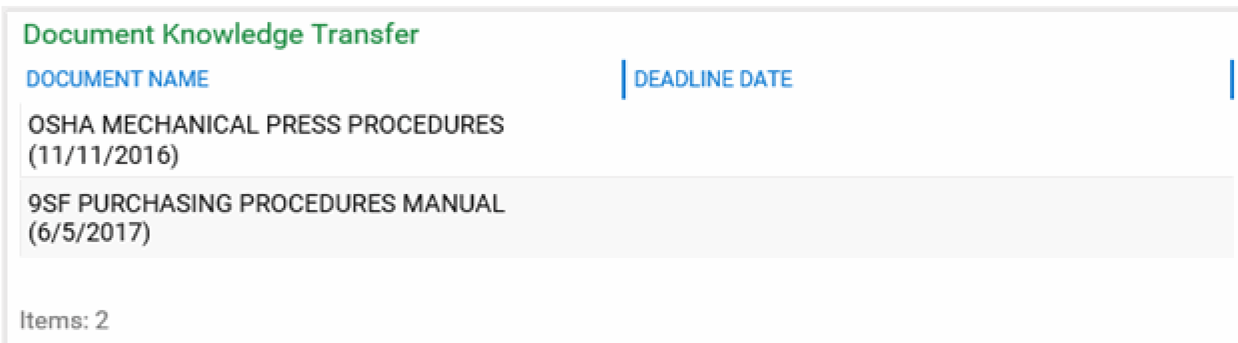
3. Click the **Search** or **Submit** button. The button's name may vary depending on the custom query's configuration.
   - Documents matching your search parameters are displayed. Depending on the type of custom query used, the results may be displayed in a separate window.
   - If no documents match the query's parameters, then the message **No documents found** is displayed.

   To sort results, click a column header.
4. Double-click a document to open it. If the results list is displayed within the portlet, click the **Search** tab to perform a new search.

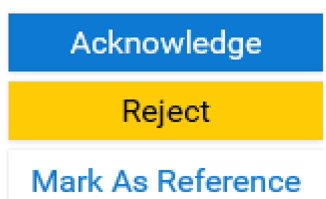
Document Knowledge Transfer Portlets

Document Knowledge Transfer (DKT) portlets display documents in your assigned reading groups. The portlet displays the name of the document and, if applicable, the deadline date it should be read by.

Depending on the portlet's settings, it may display only documents that you have or have not viewed. It also may display only documents that are overdue or marked as reference. Double-click a document to open it.

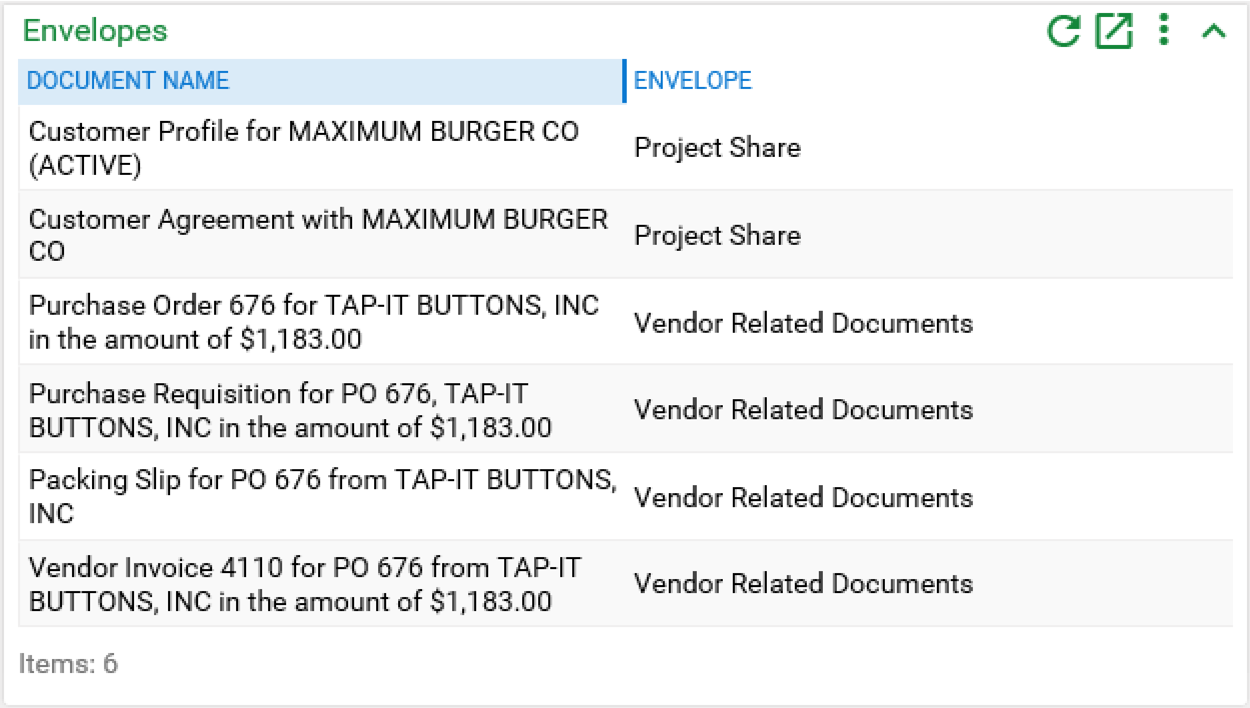


In the pane to the right of an open document, click a button to reject, acknowledge, or mark the document as a reference. For more information about using these options, see the Document Knowledge Transfer help files.



Envelope Portlets

Envelope portlets display documents that reside in the specified envelope(s). If the portlet is configured for multiple envelopes, then it also displays the envelope in which each document resides. Double-click a document to open it.

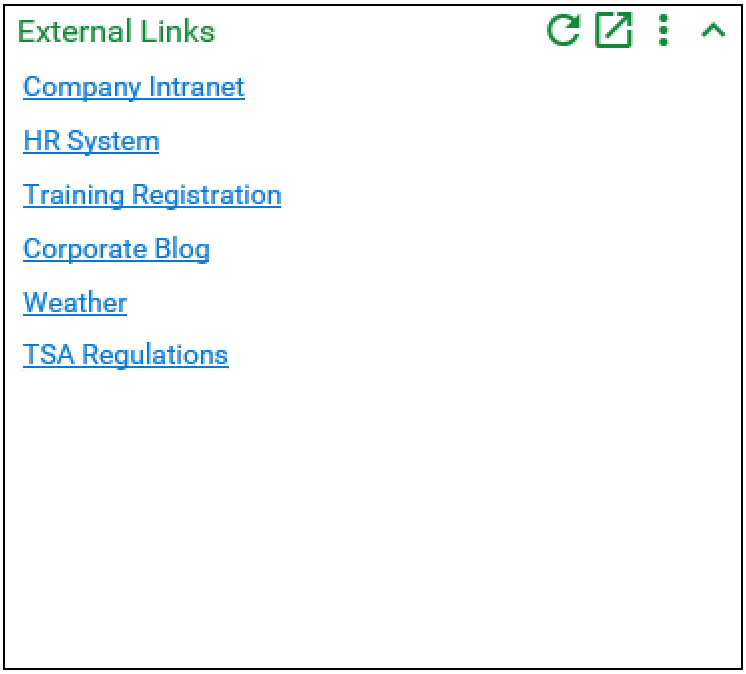

Envelopes

DOCUMENT NAME	ENVELOPE
Customer Profile for MAXIMUM BURGER CO (ACTIVE)	Project Share
Customer Agreement with MAXIMUM BURGER CO	Project Share
Purchase Order 676 for TAP-IT BUTTONS, INC in the amount of $1,183.00	Vendor Related Documents
Purchase Requisition for PO 676, TAP-IT BUTTONS, INC in the amount of $1,183.00	Vendor Related Documents
Packing Slip for PO 676 from TAP-IT BUTTONS, INC	Vendor Related Documents
Vendor Invoice 4110 for PO 676 from TAP-IT BUTTONS, INC in the amount of $1,183.00	Vendor Related Documents

Items: 6

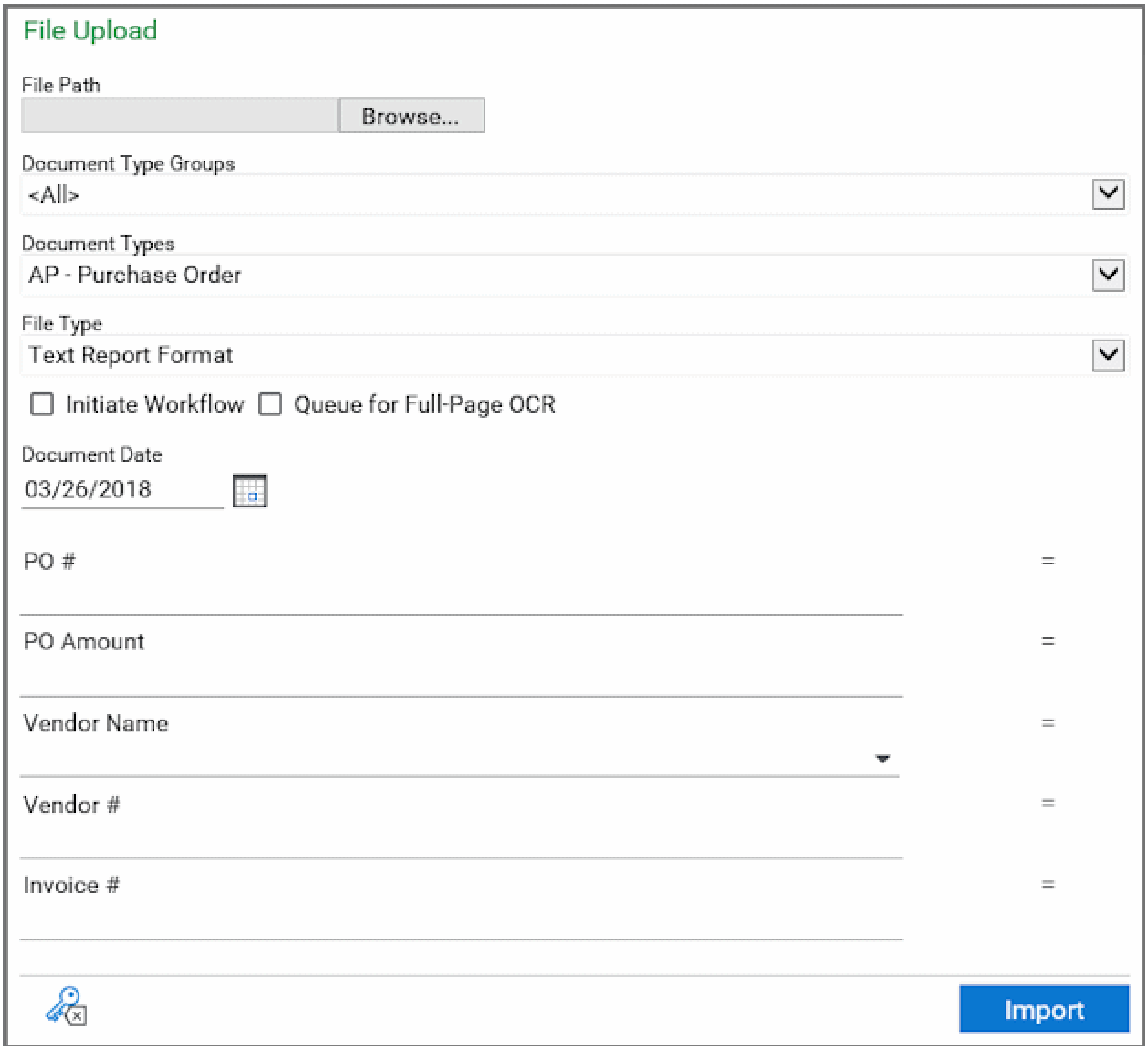
External Links Portlet

The External Links portlet provides links to other Web sites or file paths. Click a link to open the associated site or file in a new window.



File Upload Portlet

The File Upload portlet allows you to import documents into OnBase.



To upload a file:

1. Click **Browse** to select the file you want to upload.
2. Select a Document Type Group, Document Type, and File Type.

3. Select the Document Date.

Note: Depending on your system configuration, the **Document Type Groups**, **Document Types**, and **File Type** drop-down lists, as well as the **Document Date** field, the **Initiate Workflow** option, or the **Queue for Full-Page OCR** option, may not be displayed. See your system administrator for more information.

Tip: To retain the selected date for future uploads, click the lock button to the right of the calendar. The selected date is retained until you click the lock button again to unlock it.

4. Enter Keyword Values for the document. Available Keyword Type fields vary per Document Type.
5. Click the **Import** button to import the document into OnBase.

   If necessary, click the **Clear Keywords** button to clear all Keyword Values, or click the **Clear All** button to start over.

Folder Portlets

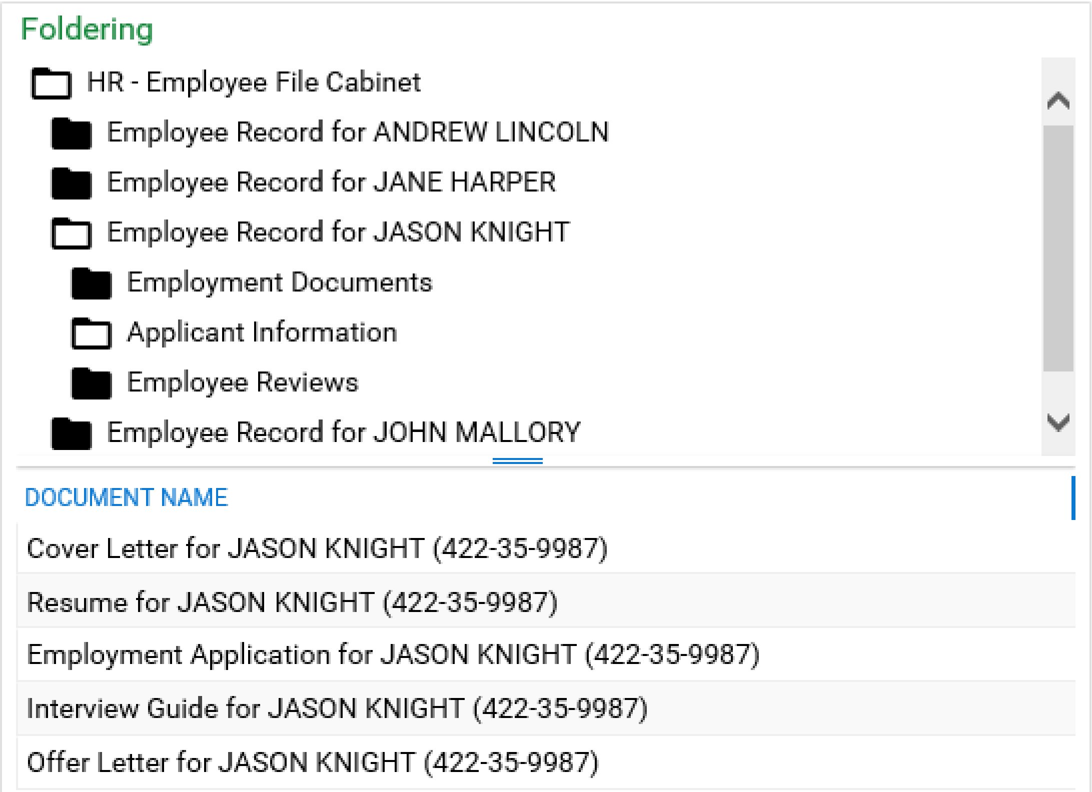
Depending on their configuration, folder portlets may allow you to browse or search for folders.

Browsing Folders

If the portlet displays a list of folders, you can click a folder to view its contents.

Depending on the portlet's configuration, contents are displayed either in the Folders window or within the portlet itself.

- If the Folders window is displayed, see Navigating the Folders Window on page 104.
- If the contents are displayed within the portlet, continue browsing the folder structure until you find the documents you are looking for. The **Documents** list displays the documents residing in the selected folder. Double-click a document to open it.



Tip: If a folder contains a long list of documents, click and drag the divider above the list to display more documents.

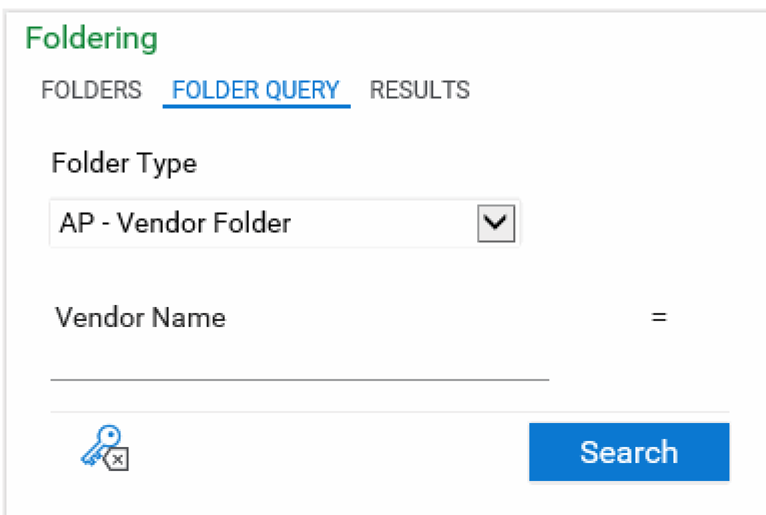
Searching for Folders

Depending on the portlet's setup, you may be able to conduct folder searches within the portlet.

Note: If your user has no configured rights to view any folder types, an error message is displayed: **There are no folder types available for searching.**

1. If necessary, click the **Folder Query** tab.
   The **Folder Query** tab is present only if the portlet is configured to both search for folders and display a list of folders by default.

2. Select a Folder Type from the **Folder Type** drop-down.



   If any Keyword Types are assigned to the selected Folder Type, Keyword Type fields are displayed.

Note: If the Folder Type has one or more Keyword Types, then at least one valid Keyword Value must be entered. You cannot retrieve folders by entering only space characters or asterisks (*).

3. Enter Keyword values as necessary.
   - You can use all functionality of Keywords in the folder search, including adding additional instances of a Keyword Type or Keyword Type Group, or using Wildcard or Boolean operators to narrow the search.
   - If a Folder Type requires a Keyword value to be provided, the required Keyword Type is displayed in red.
   - To clear all Keyword values, click **Clear**.
4. Click **Search** to find all folders matching the criteria.
   - If the portlet is configured to display search results within the portlet, then the **Results** tab displays the folders retrieved by your search.

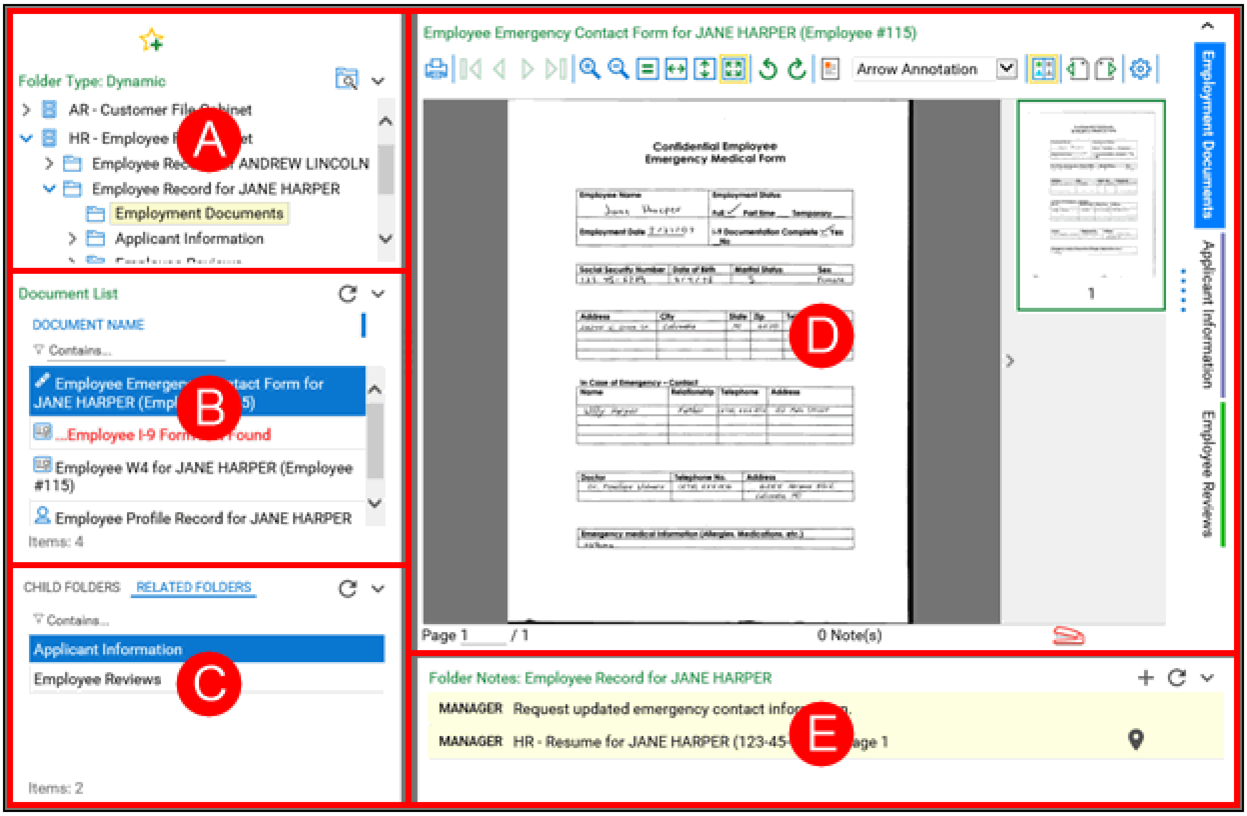
     See Browsing Folders on page 101.
   - If the portlet is configured to display search results in a new window, the Folders window is displayed.

     See Navigating the Folders Window on page 104.

Navigating the Folders Window

Depending on how the portlet is configured, the **Folders** window may be displayed when you open a folder or retrieve a folder search list.

The **Folders** window displays all available file cabinets and folders. The following diagram highlights the main sections of the **Folders** window.



Section	Description
A	Folder Tree: Displays folder hierarchy. Also allows you to add the Folders window to your Favorites or perform a folder search.
B	Document List: Lists all documents in the selected folder, unless a template is applied.
C	Child Folders/Related Folders: Displays child folders (subfolders) and related folders of the selected folder.
D	Document Viewer: Displays the selected document and folder tabs, if configured.
E	Folder Notes: Lists all folder notes in the current branch of the folder tree, if the branch is configured to allow notes.

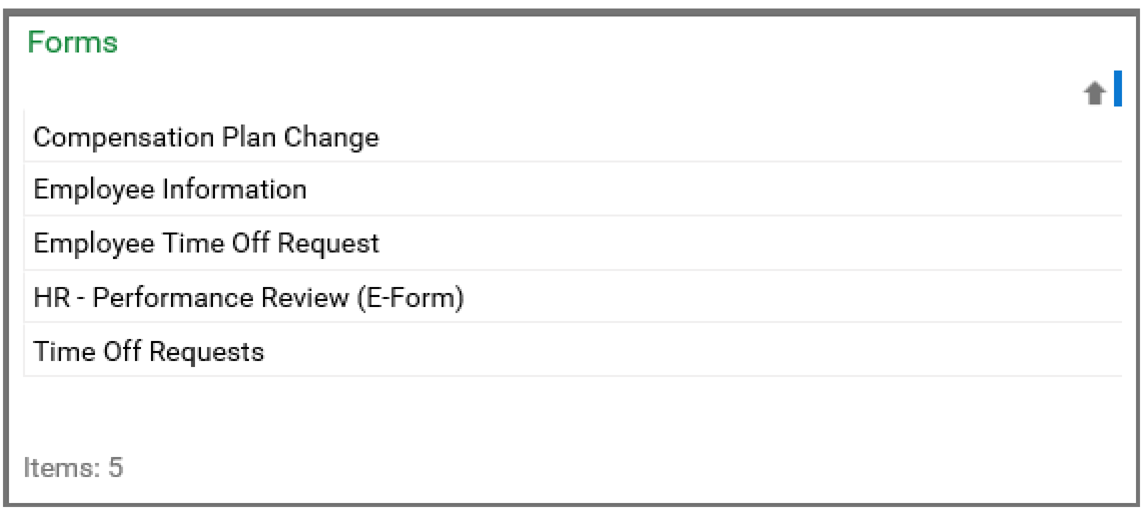
Note: A folder search may return the same folder multiple times if the folder is indexed with multiple instances of a Keyword Type Group and each instance has the same value for one of the Keyword Types.

Display Child Folders in a Pop-up List

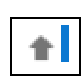
If the folders are configured with the **Display Child Folders in a Pop-up List** option selected, the Folders window is displayed, and the **Find Folder** dialog is displayed so you can search for the folders.

Form Portlets

Form portlets display HTML E-Forms, Unity Forms, and Image Forms that can be created from the portlet. Double-click the form you want to create.



You can change the way the forms are sorted by clicking on the **Sorted ascending/descending** button.



Click **Sorted ascending** to sort the forms in ascending order. Click **Sorted descending** to sort the forms in descending order.

HTML Portlets

HTML portlets can vary greatly depending on your configuration. They can contain content such as Web links, OnBase links, images, tables, and formatted text. OnBase links can include the ability to view a document, create an E-Form, or create a Unity Form.

SharePoint Site Dashboard Portlets

Note: This portlet requires a Site Provisioning for Microsoft SharePoint license.

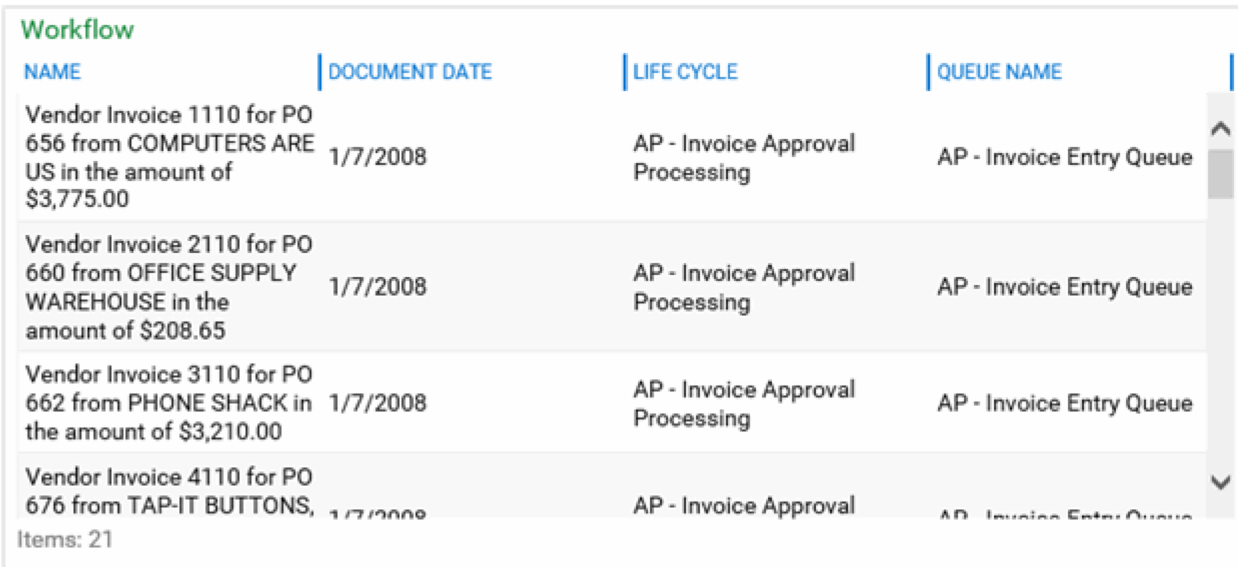
The SharePoint Site Dashboard portlet provides a log of SharePoint sites created by the Site Provisioning for Microsoft SharePoint module. Entries include the URL to the SharePoint site and the date of creation.

Double-click a URL to open the site in a new window.

Workflow Portlets

Workflow portlets display documents from selected queues. If the portlet is configured for multiple queues, then it lists the name, date, queue, and life cycle for each document.

The following illustration provides an example of a Workflow portlet configured to display multiple queues:



If the portlet is configured to display only one queue, then the portlet displays only the name and date of each document in the queue.

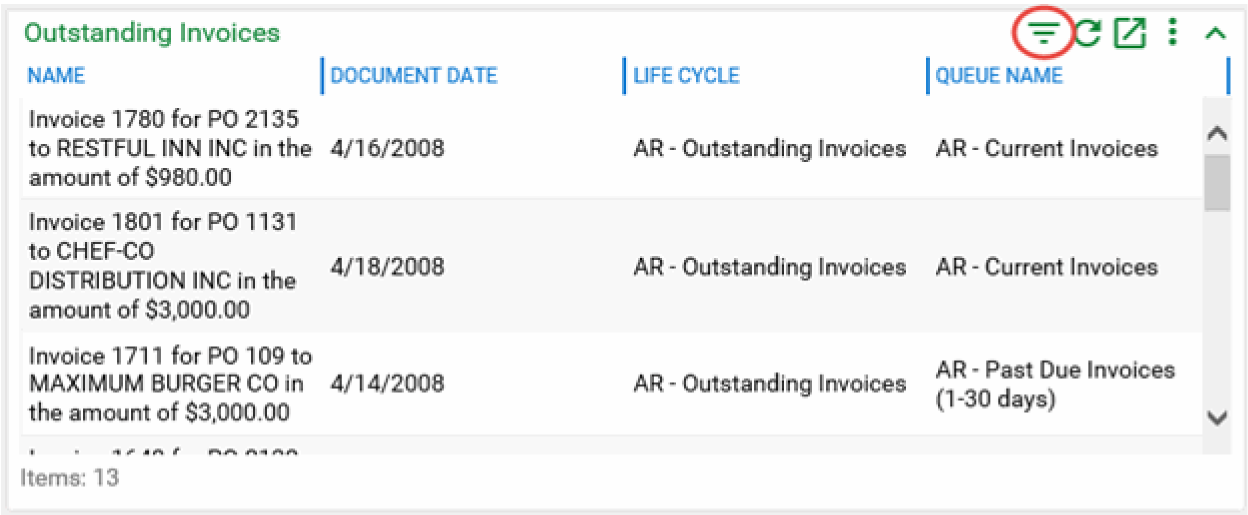
Tip: To sort documents by column, click the column's header.

Filtering Workflow Documents

Depending on your Workflow solution's setup, you may be able to filter Workflow portlets to display a specific subset of documents. When you apply a Workflow filter, the portlet displays only documents belonging to the filter's assigned Document Types, and the filter's columns provide additional document information.

To filter a Workflow portlet:

1. Click the **Filter Items** button in the upper-right corner of the Workflow portlet.



   The portlet displays a menu listing all filters available for any queue assigned to the portlet.
2. From the menu, select the filter you want to apply.

   The portlet displays the documents that match the filter criteria. Only one filter can be applied at a time.

Note: If a Keyword Type that is used as a display column has more than one value for a document, the document will be listed for each Keyword Value.

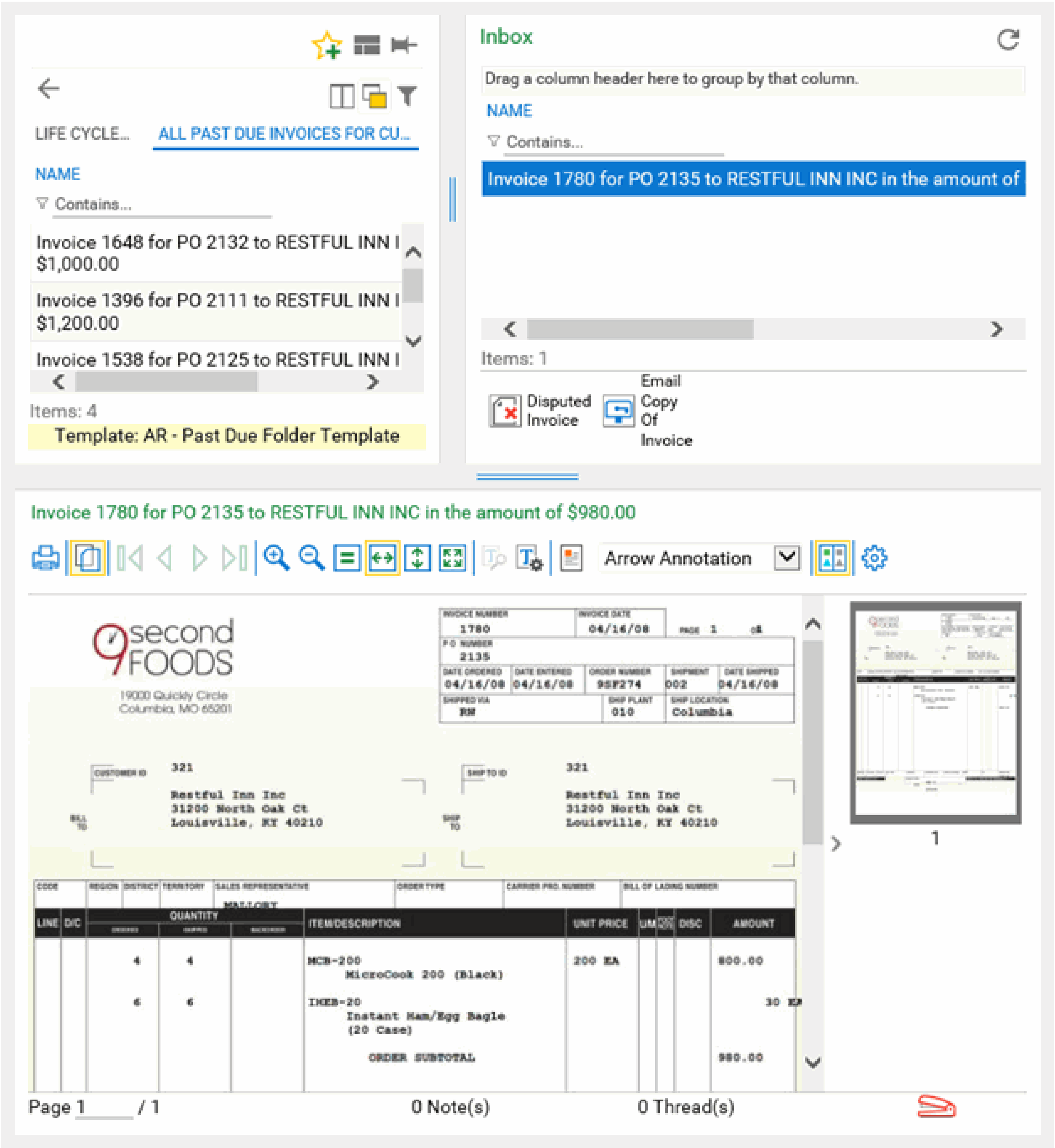
Note: Filters configured with an HTML form do not display the HTML form when they are applied in StatusView. Workflow portlets are filtered according the Document Types assigned to the filter.

To remove a filter:

1. Click the **Filter Items** button in the upper-right corner of the Workflow portlet.
2. Select **None**.

Opening Web Workflow

Double-click a document to open it in the Web Workflow page.



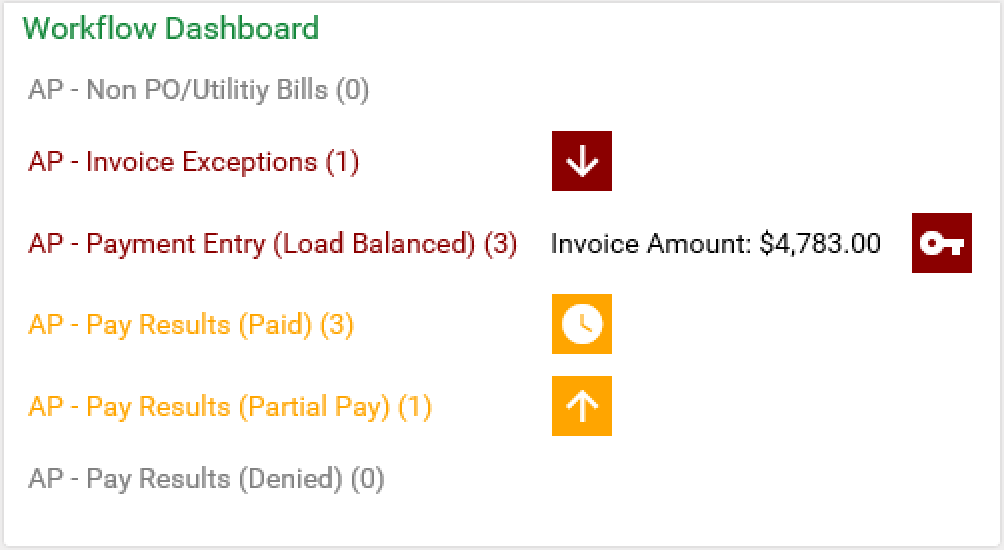
This page displays the selected document, its related documents, and ad hoc tasks configured for the document's queue. Click the **Life Cycle View** tab to view other life cycles you have rights to view.

For more information about Workflow functionality, see the Web Workflow documentation.

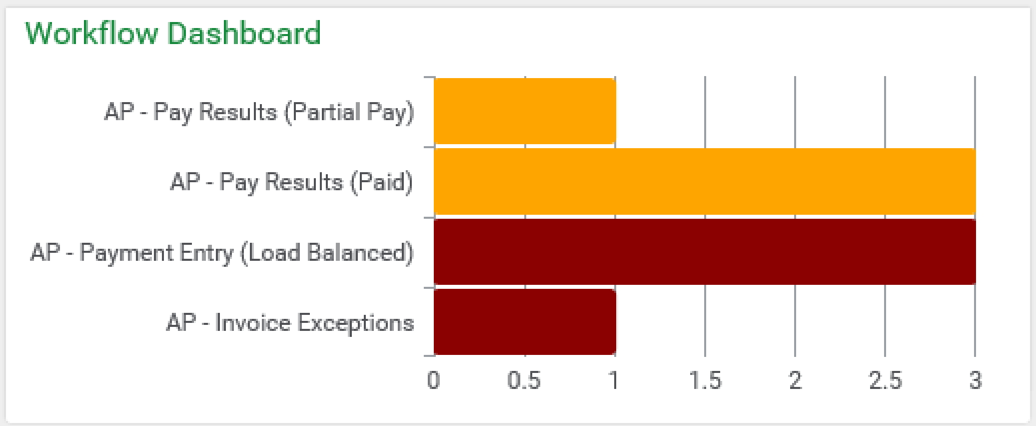
Workflow Dashboard Portlets

Note: This portlet requires a Business Activity Monitoring license.

Workflow Dashboard portlets display a configured set of Workflow queues for monitoring.



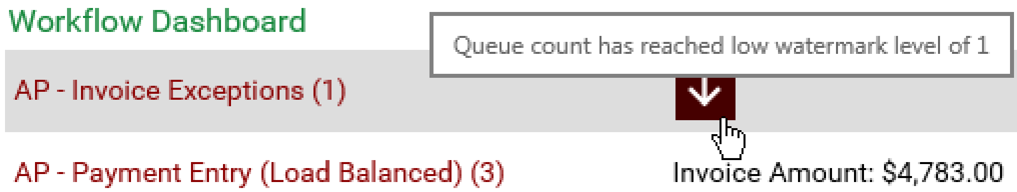
Each queue and its document count are listed. If the portlet is configured to display a chart, the chart displays a bar for each queue.



Warnings and alerts may be triggered based on the following criteria:

- Document count: The number of documents is too high or too low.
- Document age: The queue contains a number of documents that meet or exceed a configured age.
- Keyword sum: The documents' combined value for a Keyword Type is too high.

If the document count, age, or Keyword sum triggers a warning or alert, a monitoring symbol is displayed to the right of the queue. Rest your pointer over a symbol to display its meaning.



Monitoring symbols are described in the following table:

Symbol	Description
	High watermark. This symbol indicates that the number of documents residing in a queue is at the high watermark warning or alert level.
	Low watermark. This symbol indicates that the number of documents residing in a queue is at the low watermark warning or alert level.
	Document age. This symbol indicates the document age for documents residing in the queue is at the warning or alert level. Document age is determined by the time the document entered the queue. **Note:** A tolerance setting may have been configured to allow a number of older documents to reside in the queue without triggering the warning or alert.
	Keyword sum. This symbol indicates the documents' combined value for the displayed Keyword Type is at the warning or alert level.

Whether the queue is at a warning or alert level is indicated by the color in which the queue's name, monitoring symbol, and bar are displayed. The default colors for warning and alert levels are orange and red, respectively.

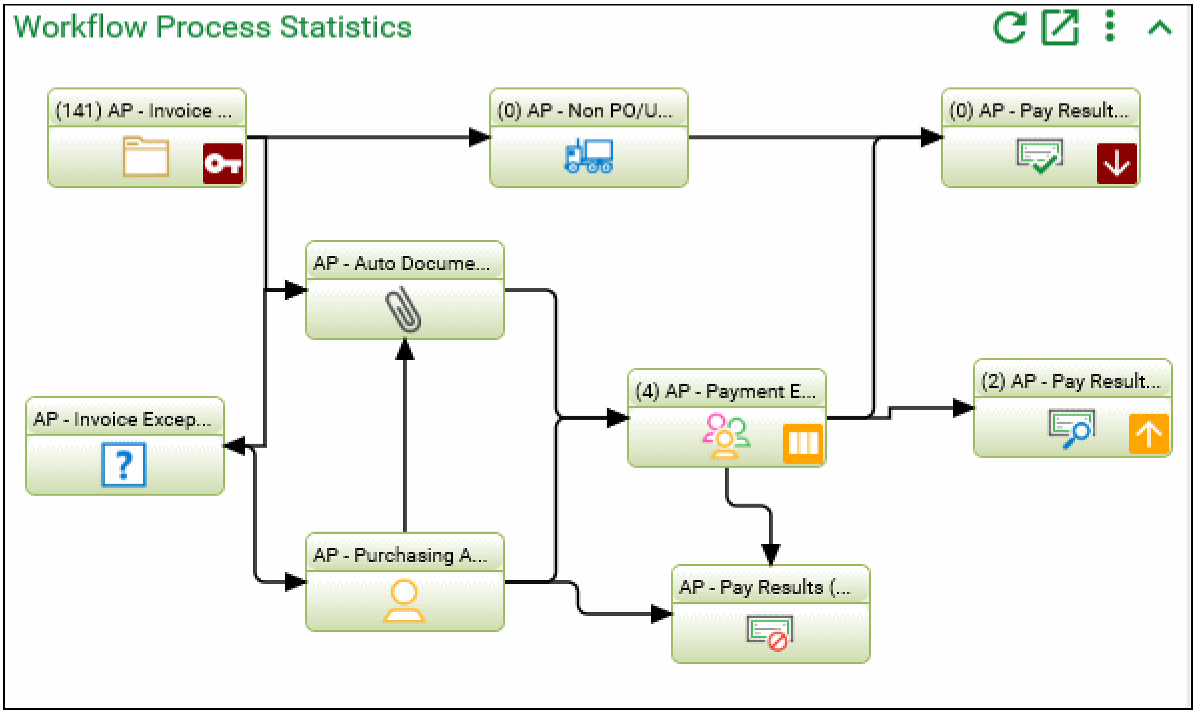
Click a queue to open the Web Workflow page, which is described under Workflow Portlets on page 107.

To rotate, print, or save the chart, see Using the Chart Viewer on page 120.

Workflow Process Statistics Portlets

Note: This portlet requires a Business Activity Monitoring license.

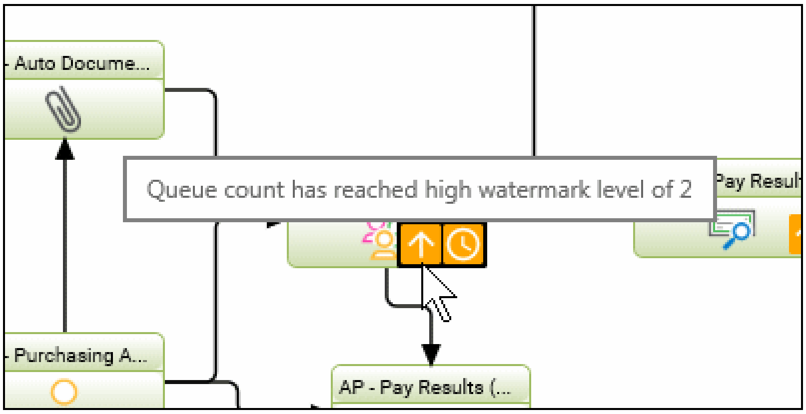
Workflow Process Statistics portlets display a graphical view of Workflow life cycles for monitoring. Each portlet provides a snapshot of a life cycle, including the number of documents in each queue and how documents are transitioned between queues. Each queue is represented by its configured shape and icon. The number of documents residing in a queue is displayed next to the name of the queue.



Warnings and alerts may be triggered based on the following criteria:

- Document count: The number of documents is too high or too low.
- Document age: The queue has contained documents past a configured amount of time.
- Keyword sum: The documents' combined value for a Keyword Type is too high.

If the document count, age, or Keyword sum triggers a warning or alert, a monitoring symbol is displayed next to the icon in the queue. Rest your pointer over a symbol to display its meaning.



Monitoring symbols are described in the following table:

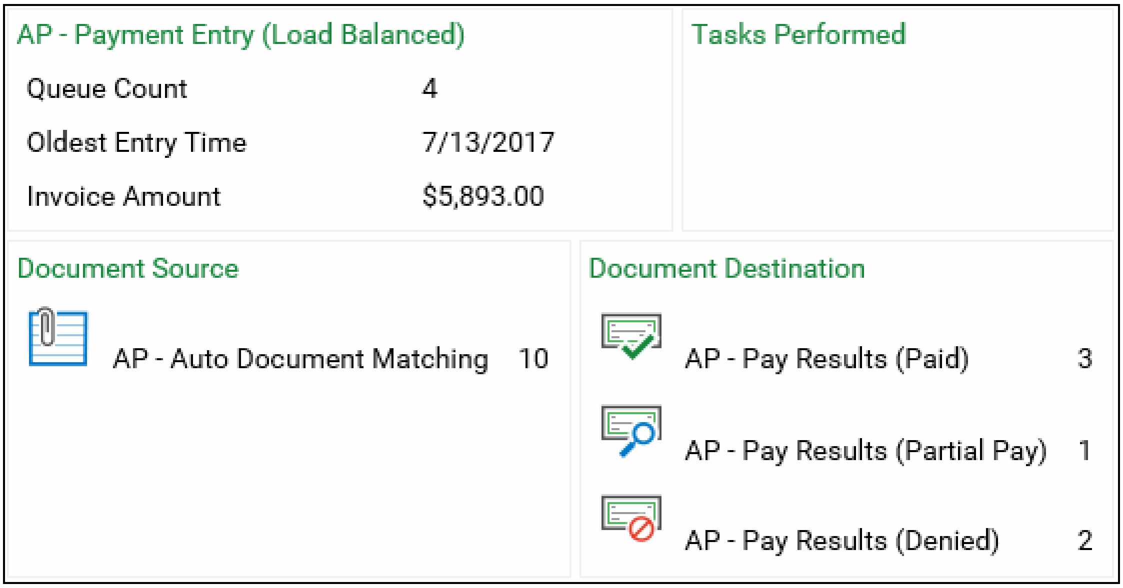
Symbol	Description
	High watermark. This symbol indicates that the number of documents residing in a queue is at the high watermark warning or alert level.
	Low watermark. This symbol indicates that the number of documents residing in a queue is at the low watermark warning or alert level.
	Document age. This symbol indicates the document age for documents residing in the queue is at the warning or alert level. Document age is determined by the time the document entered the queue. **Note:** A tolerance setting may have been configured to allow a number of older documents to reside in the queue without triggering the warning or alert.
	Keyword sum. This symbol indicates the documents' combined value for the displayed Keyword Type is at the warning or alert level.

Whether the queue is at a warning or alert level is indicated by the color in which the monitoring symbol is displayed. The default colors for warning and alert levels are orange and red, respectively.

Workflow Queue Activity Portlets

Note: This portlet requires a Business Activity Monitoring license.

Workflow Queue Activity portlets display real-time activity of actions performed in a queue for monitoring.



The panes containing this information may be arranged horizontally or vertically, depending on the amount of horizontal space available.

Workflow Queue Activity portlets are highly configurable and may display the following information:

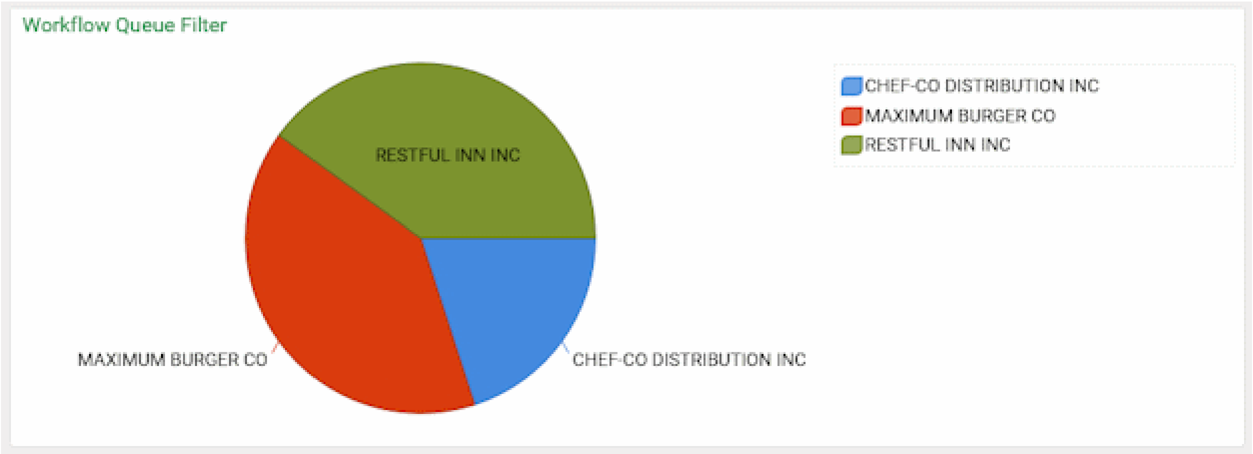
- **Queue Statistics** - This pane displays the queue's name, document count, and oldest entry date. The pane may also display a combined value for a Keyword Type from all documents in the queue.
- **Tasks Performed** - This pane displays the tasks performed at the task list level, including system work, user work, ad-hoc user tasks, and timer work. Actions and rule-level work are not included. A disabled task is counted if there is an attempt to execute it (e.g., through system or timer work).
- **Document Source** - This pane displays where the documents in the queue transitioned from. Click a queue's name to open the queue using Web Workflow. The Document Source pane displays transitional queues only. The source is not displayed for documents entering the selected queue through an import process or through document import.
- **Document Destination** - This pane displays where the documents in the selected queue transitioned to. Click a queue's name to open the queue using Web Workflow. The Document Destination pane displays transitional queues only. The destination is not displayed for documents transitioned out of the life cycle or deleted upon exiting the queue.

Workflow Queue Filter Portlets

Note: This portlet requires a Business Activity Monitoring license.

Workflow Queue Filter portlets display a filtered view of documents in a queue, grouping documents together by entry date, assigned user, or Keyword value. Results may be displayed in a pie, bar, or column chart. In the following examples, documents are grouped by Assigned To.

As an example, the pie chart view will look similar to the following:



Tip: Rest your pointer over a pie piece or bar to display the label for that part of the chart. For example, **Manager (6)** may be displayed. In this example, the information is grouped by job role, and the number **6** represents the total number of documents for **Manager**. The method for grouping and totaling varies based on the portlet's configuration. In addition, if the portlet is configured to display labels, the labels display this information automatically.

Clicking on any of the queues in the chart will open the Web Workflow page, which is described under Workflow Portlets on page 107.

To rotate, print, or save the chart, see Using the Chart Viewer on page 120.

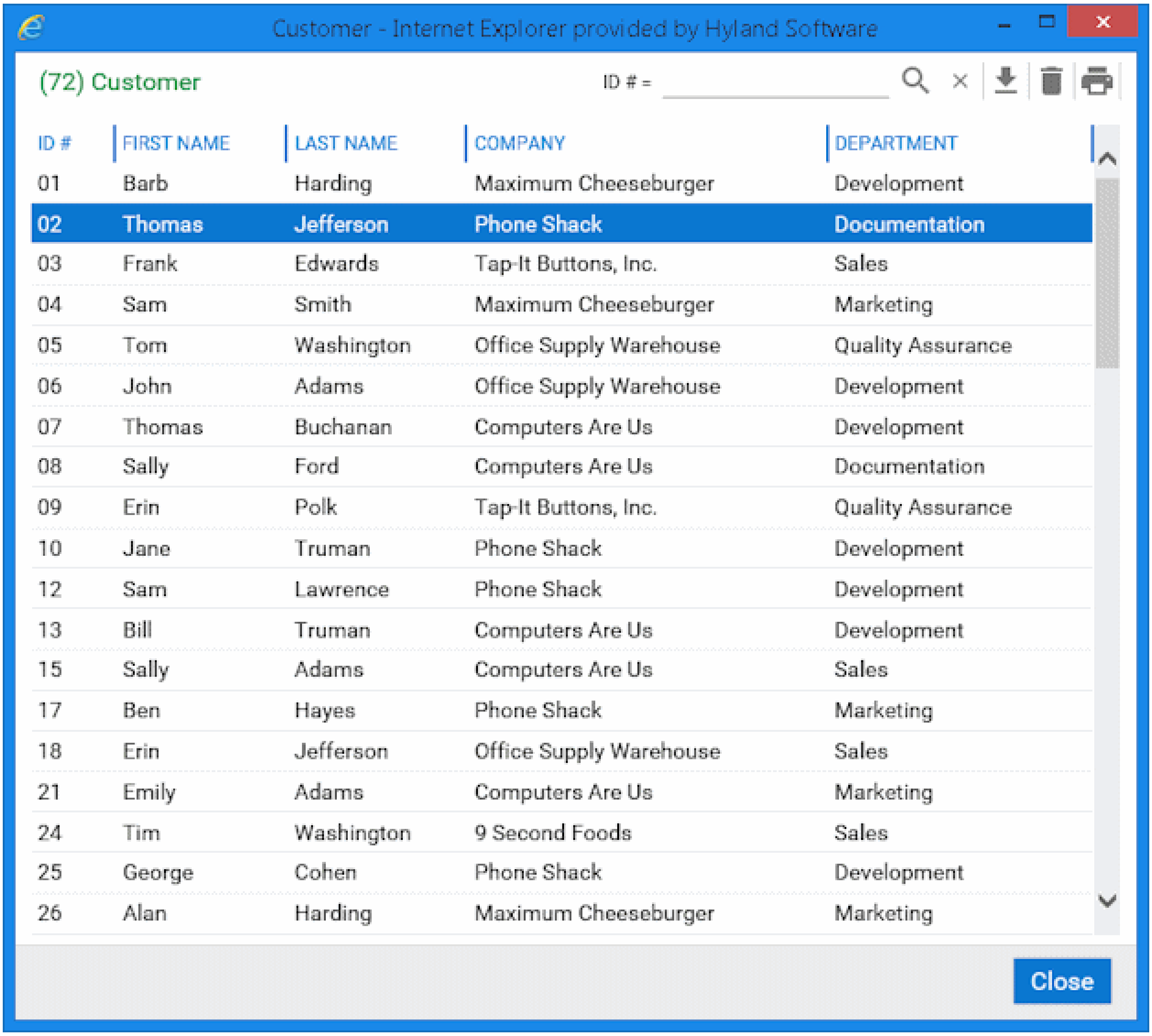
WorkView Filter Portlets

Note: If a WorkView database update is required, a message is displayed in place of WorkView content.

WorkView portlets are windows to WorkView filters. Depending on the filter selected, the portlet may display a list of objects, or it may display search fields and a search button.

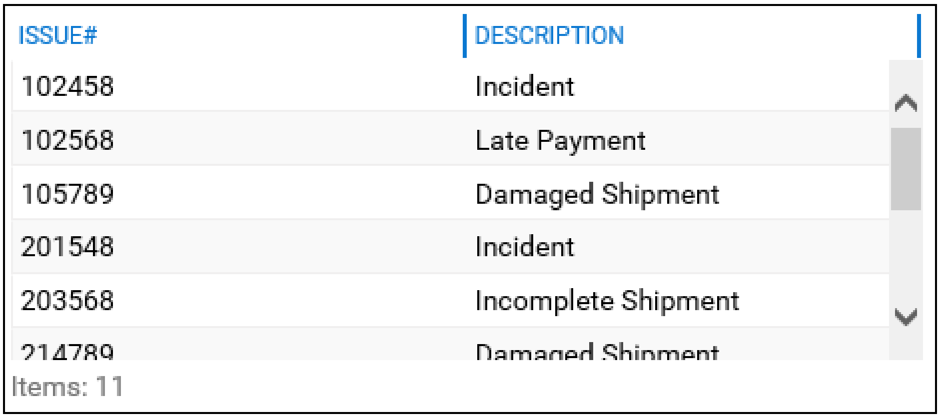
The following is an example of a filter that is configured to display search fields with User Entry Constraints.

The results are configured to display in a new window. Double-click an object to open it.



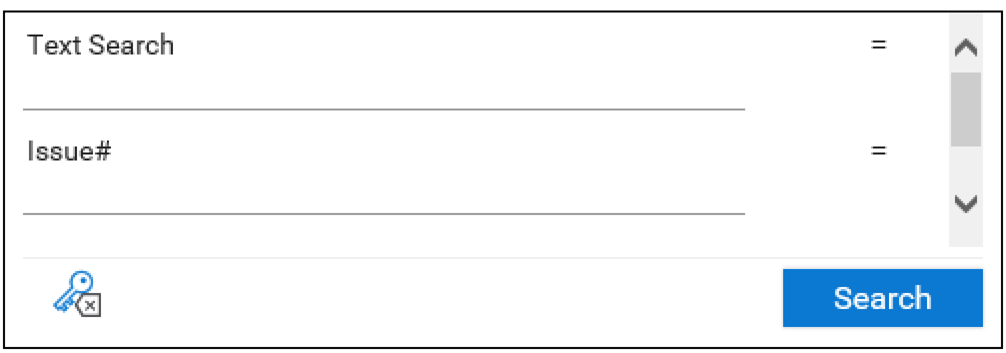
ID #	FIRST NAME	LAST NAME	COMPANY	DEPARTMENT
01	Barb	Harding	Maximum Cheeseburger	Development
02	Thomas	Jefferson	Phone Shack	Documentation
03	Frank	Edwards	Tap-It Buttons, Inc.	Sales
04	Sam	Smith	Maximum Cheeseburger	Marketing
05	Tom	Washington	Office Supply Warehouse	Quality Assurance
06	John	Adams	Office Supply Warehouse	Development
07	Thomas	Buchanan	Computers Are Us	Development
08	Sally	Ford	Computers Are Us	Documentation
09	Erin	Polk	Tap-It Buttons, Inc.	Quality Assurance
10	Jane	Truman	Phone Shack	Development
12	Sam	Lawrence	Phone Shack	Development
13	Bill	Truman	Computers Are Us	Development
15	Sally	Adams	Computers Are Us	Sales
17	Ben	Hayes	Phone Shack	Marketing
18	Erin	Jefferson	Office Supply Warehouse	Sales
21	Emily	Adams	Computers Are Us	Marketing
24	Tim	Washington	9 Second Foods	Sales
25	George	Cohen	Phone Shack	Development
26	Alan	Harding	Maximum Cheeseburger	Marketing

The following is an example of a filter that lists objects without searching. Double-click an object to open it. All WorkView functionality available for an open object is available when the object is accessed through StatusView.

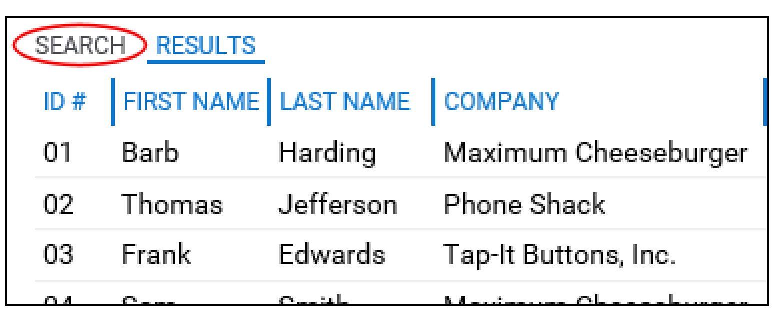


Tip: To sort results by column, click the column's header.

The following is an example of a filter that displays search fields. Enter the search parameters in the search fields and click **Search**.



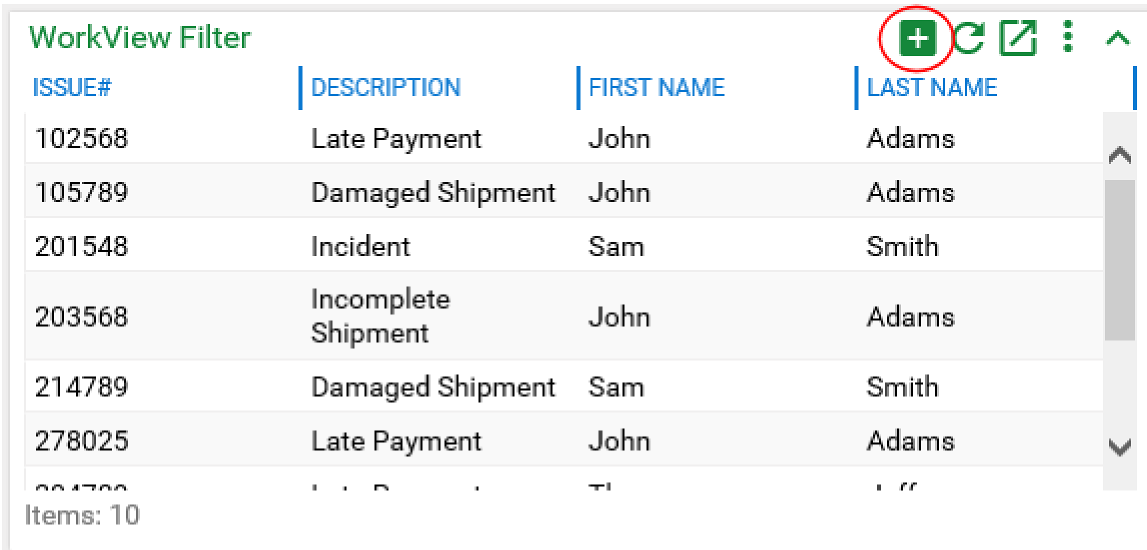
A list of objects is displayed. Double-click an object to open it. If the results are displayed within the portlet, click the **Search** tab to perform a new search.



Creating New Objects

The WorkView Filter portlet allows you to create new objects within the current WorkView application. To create a new object:

1. Click the **Create** button.



2. Select a class for the new object.
3. Fill out and save the object as needed. For detailed information about working with objects, see the **WorkView | Case Manager** module reference guide or help files.

WorkView Summary Portlets

The WorkView Summary portlet is displayed in one of three views: Tabular, Pie Chart, or Bar Chart.

Tabular

The following is an example of the tabular view:

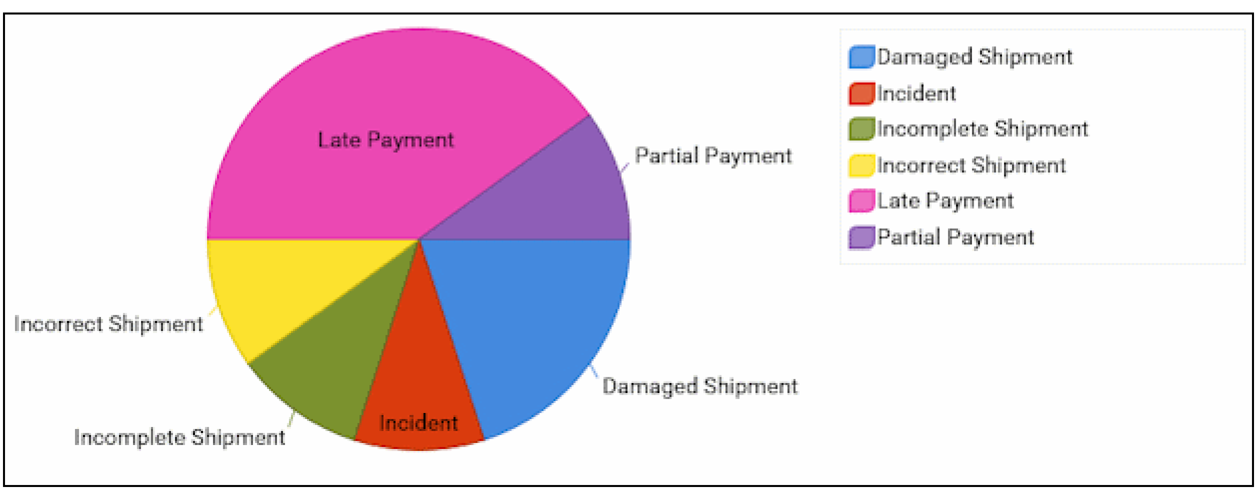
NAME	COUNT	PERCENT
Damaged Shipment	2	18.18
Incident	2	18.18
Incomplete Shipment	1	9.09
Incorrect Shipment	1	9.09
Late Payment	4	36.36
Partial Payment	1	9.09

Items: 6

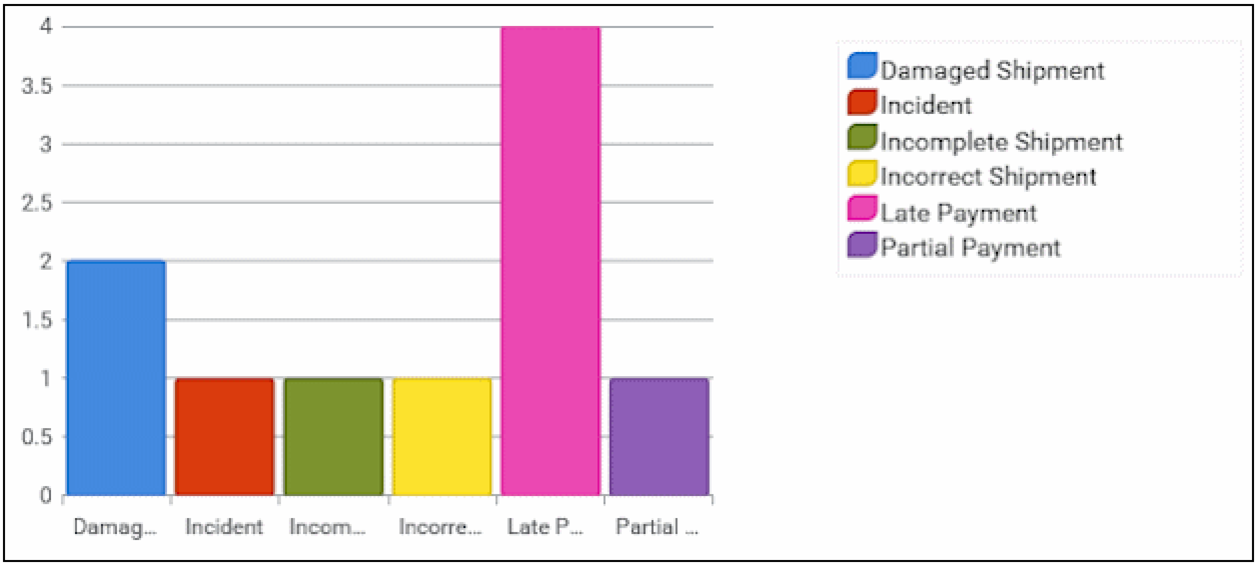
Double-click any category to display a list of WorkView objects that belong to the category.

Pie Chart and Bar Chart

The following example illustrates the pie chart view:



The following example illustrates the bar chart view:



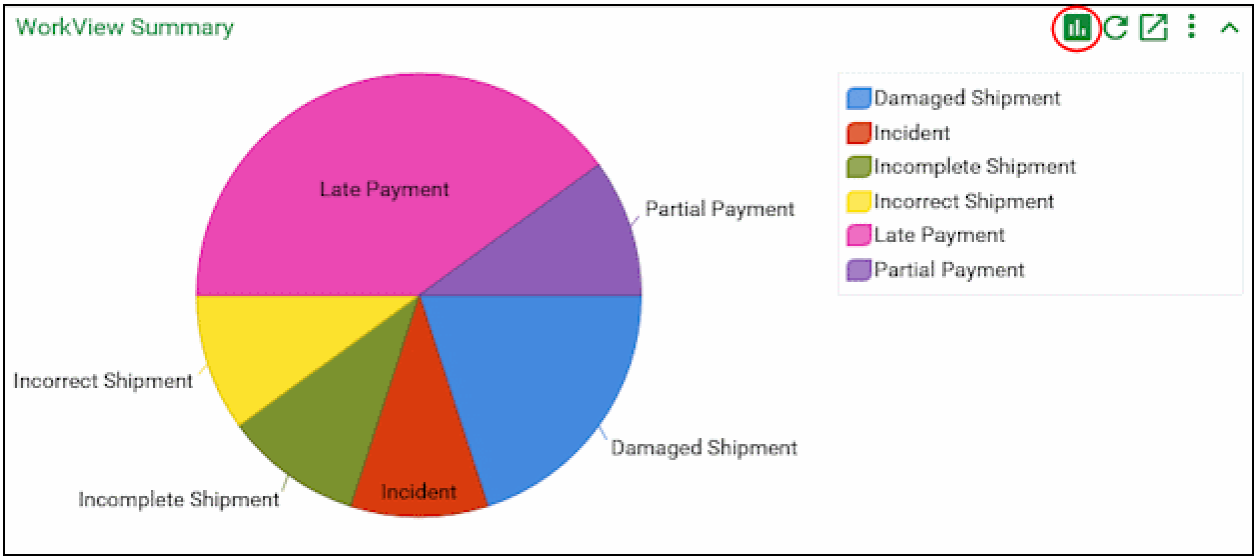
Click on any category in the chart to display a list of WorkView objects that belong to the category.

To rotate, print. or save the chart, see Using the Chart Viewer on page 120.

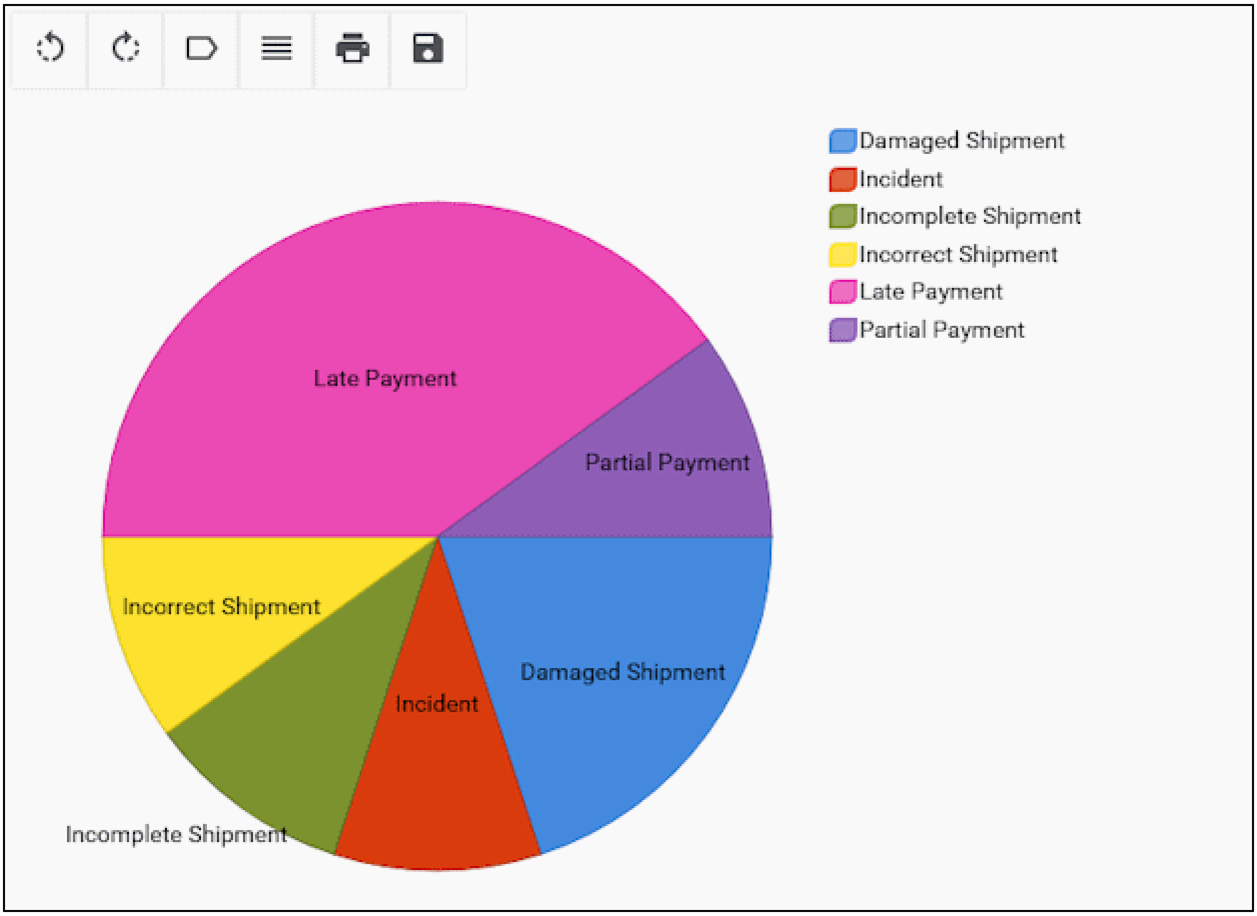
Using the Chart Viewer

Both the Workflow Queue Filter and WorkView Summary portlets can display data in as a chart or graph.

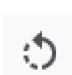
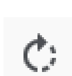
To zoom in on the chart and see all labels, click the **Open Chart** button displayed in the title bar of the portlet.



When you click **View**, the Chart Viewer window opens and lets you perform several tasks.



Use the buttons at the top of the window to rotate, toggle the labels and legend, print, or save the chart.

Button	Description
	Rotates the chart horizontally to the left.
	Rotates the chart horizontally to the right.
	Hides or displays the chart labels.

Button	Description
	Hides or displays the chart legend.
	Prints the display.
	Saves the display in a .png format in its current rotation.