



Performing Basic Console Tasks

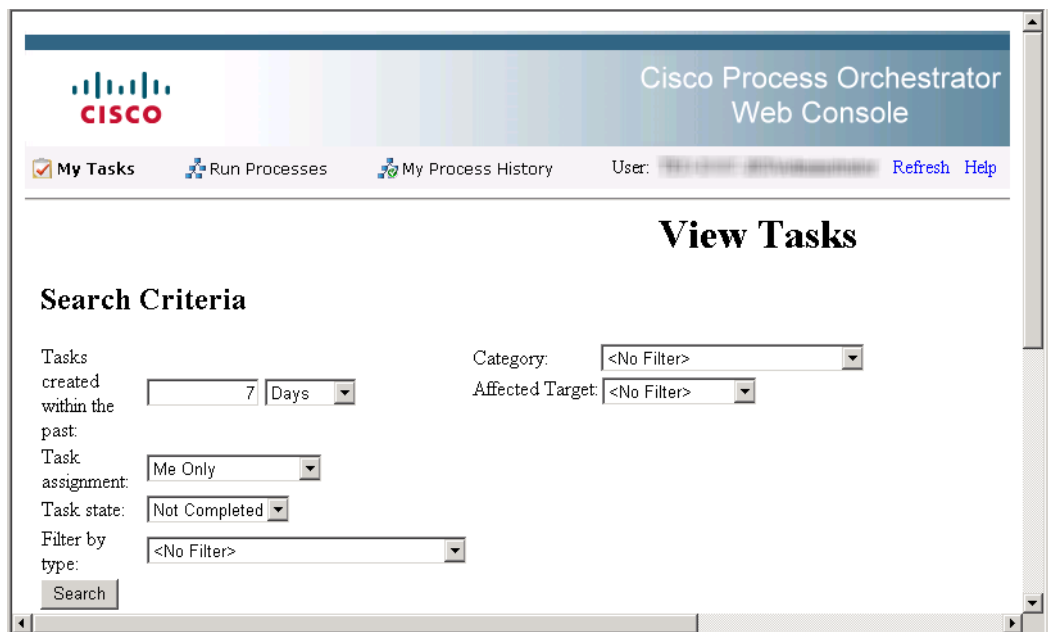
The Process Orchestrator Web Console provides a simplified web-based view to allow end users to interact with automation. The web console does not allow users to define processes but does allow them to start processes, monitor processes they started, or interact with human steps in processes called *tasks* (such as approvals). This interface is purposefully simplified to minimize the learning curve of the occasional user.



Note

The Web Console is typically not used when Process Orchestrator is used in conjunction with Cisco Prime Service Catalog. In these cases, end-user interaction occurs through the catalog rather than Process Orchestrator interfaces. The Web Console is typically only used in cases when Process Orchestrator is used independently.

Figure 9-1 Cisco Process Orchestrator Web Console



For the Web Console to work properly, Internet Information Services must be installed on the computer on which the Web Console is installed. For information about installing and configuring IIS, refer to the *Cisco Process Orchestrator Installation Guide*.

You cannot create or modify processes on the Web Console. To modify a process, you must have the appropriate security rights and must access the Process Orchestrator console. If you think you should have access to the expert Process Orchestrator console, contact your manager to authorize your access.

Use the following sections for instructions on navigating and performing actions in the Web Console:

- [Launching the Web Console, page 9-2](#)
- [Performing Web Console Actions, page 9-2](#)

Launching the Web Console

To use the Process Orchestrator Web Console, you must log in using your Windows credentials. If you have Windows integrated authentication configured, then logging in might not be required.

To access the Web Console, choose one of the following:

- Open the Cisco Process Orchestrator console and choose **File > Environment Properties** to see the web console location.
- Choose **Operations > Getting Started > Launch Web Console**.
- Choose **Start > All Programs > Cisco > Cisco Process Orchestrator > Cisco Process Orchestrator Web Console**.

Performing Web Console Actions

The following sections describe some of the typical actions you can perform using the Web Console.

Refreshing the Display

The Refresh option updates the information on the current web page.

To refresh the current view, use *one* of the following methods:

- Press **F5**.
- Click the **Refresh** tool.
- On the navigation bar, click **Refresh**.

The display refreshes with the latest information generated from the Process Orchestrator server.

Viewing the My Tasks Page

Use the My Tasks page to navigate and manage Process Orchestrator tasks in the Web Console.

Before You Begin

To make sure the default search criteria is available after the initial search on the Process Orchestrator Web Console, enable the cookies in your browser.

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- Step 1** Launch the Web Console and click **My Tasks**.
- Step 2** Enter the search criteria, then click **Search**. Tasks can be filtered to display:

- Tasks created within a selected time period.

**Note**

Press Alt E to highlight the **Tasks created within the past** option.

- Tasks assigned to the currently logged in user or user group
- Tasks filtered according to the state of the task
- Tasks filtered according to the type of task
- The affected target (for example, the default SMTP server, automation service, or Process Orchestrator server) that the alert or incident describes
- Tasks filtered according to the category assigned to the task

The <No Filter> option allows the page to display all tasks regardless of the assigned state.

Step 3 To view the task details, highlight the appropriate task, then click **View Details**.

Resolving Tasks in the Web Console

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- Step 1** Launch the Web Console, click **My Tasks**, then enter the search criteria to filter the display.
- Step 2** Highlight the appropriate task, then click **View Details** or press Alt V.
- Step 3** From the Status drop-down list, choose the appropriate status for the task resolution.
- Step 4** In the Add Notes text box, if available, enter any notes related to the task resolution or status update.
- Step 5** Click **Submit** to resolve the task.
-

Taking Ownership of a Task

These steps are used when deciding to take ownership of a task that is unassigned or assigned to an entire group of which the current logged in user is also included.

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- Step 1** Launch the Web Console, click **My Tasks**, then enter the search criteria to filter the display.
- Step 2** Highlight the appropriate task, then click **View Details**.
- Step 3** In the Add Note text box, add notes to the task, as necessary.
- Step 4** Check the **Take sole ownership of this task** check box, then click **Submit**.
-

Starting Processes in the Web Console

The Run Processes page displays the processes that the user has access to run, are enabled, and have the Started by User trigger.

- Step 1** Launch the Web Console and click **Run Processes**, then enter the search criteria to filter the display. To filter the display by category, choose the appropriate category and click **Search**.
- Step 2** On the appropriate process, click **Start**.
- Step 3** If process has input variables, under **Start the process with the following parameters**, verify or modify the values:

Column	Description
Name	Name of the input variable
Value	Value assigned to the variable
Description	Brief description of the variable
Data Type	Type of variable <ul style="list-style-type: none"> • Boolean—Indicates whether the set of elements is true or false • Hidden String—Holds data that must be protected from other Process Orchestrator users • Identity—Represents the value of a user identity • Numeric—A single whole or decimal number assigned (positive and negative) • String—Sequence of characters, such as letters, numbers, and punctuation marks displayed in a string of text • Table—Used to store a set of records in a table format

- Step 4** If the process has multiple start points and you want to start a process from a specific point, check the **Start from start point** check box, then select the appropriate starting point. The first activity after the specified starting point will run first.
- Step 5** Under **This process will execute against [Target Name]. Would you like to override?**, choose *one* of the following options:
- Yes—To specify a target or target group different from the defined process target
 - No—To continue with the process execution
- Step 6** Click **Start** to start the process; click **Observe** to review the process execution details.

Overriding the Process Target

With the appropriate rights, you can override the target of any manually-started process before process execution begins. To override the current process target, see [Starting Processes in the Web Console, page 9-3, Step 5](#).



Note Targets cannot be modified from the Web Console.

Viewing My Process History

The My Process History page displays the processes that you have run in Process Orchestrator. You can filter the display of the processes you have launched and the details of the processes.

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- Step 1** Launch the Web Console, click **My Process History**, then enter the search criteria to filter the display. You can filter by:
- Processes that were started in a specified time period.
 - Process state—Display all processes in all states (same as <No Filter>), only the processes that have succeeded, or only the process that have failed.
 - Category—Filter by the category associated with the processes in the list. The <No Filter> option displays all processes regardless of the assigned category.
- Step 2** Click **Search** to modify the process list display.
- Step 3** On the appropriate process, click **View Details**. The Process Details page displays the summary information for the process.
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Viewing an Automation Summary

An automation summary is a collection of data summarizing the objects included in the process and the data retrieved by the processing of the objects. On the web console, an automation summary can be launched from the following locations:

- Task detail page—Displays the task details of the task
- Process history page—Displays the details of the process activity

-
- Step 1** Launch the Web Console.
- Step 2** Use *one* of the following methods:
- Choose **My Tasks**, highlight the appropriate task, then click **View Details**. After the task opens, choose **Automation Summary > View**.
 - Choose **My Process History**, highlight the appropriate process, click **View Details**, then click **View Automation Summary**.

The Automation Summary page displays the following information.

Field	Description
Situation Analysis	<p>After Process Orchestrator requires action, it performs deep analysis based on the type of situation identified.</p> <p>During situation analysis, Process Orchestrator captures volatile state and diagnostic information that may otherwise be difficult or impossible to capture manually.</p> <p>The <i>Situation Analysis</i> section displays below the overview information.</p> <p>Click the link in the upper portion of the summary to navigate directly to the <i>Situation Analysis</i> section or simply scroll to the section.</p>

Field	Description
Context Analysis	<p>Process Orchestrator analyzes all data points in context with each other to identify a situation that may require action.</p> <p>This information can be viewed in the <i>Context Analysis</i> section of the summary. The <i>Context Analysis</i> displays the symptom and possible causes.</p>

The topics in the following sections describe some of the more typical actions you can perform from the Process Orchestrator console:

Basic Actions

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Refreshing the View

The Refresh option updates the information on the current view.

To refresh the current view, choose **View > Refresh**, or click **F5**.

Viewing and Modifying Object Properties

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- Step 1** Click **Definitions > [Object]**, highlight the appropriate object, right-click and choose **Properties**.
 - Step 2** On the [Object] Properties property sheet, click the tabs to view and update the various properties for that object.
 - Step 3** Click **OK** to close the dialog.
-

Configuring the Navigation Pane

The Navigation pane includes views that you use to perform specific functions in the product. You can customize the views that display in the Navigation pane and the order in which they display.

Step 1 In the bottom right corner of the Navigation pane, click the >> icon.

Step 2 Select the option for the appropriate action to be performed:

Field	Description
Show More Buttons	Select this menu item to add buttons (views) to the Navigation pane. This option is available only if all of the available views are not currently displayed.
Show Fewer Buttons	Select this menu item to remove buttons (views) from the Navigation pane. This option is available when there are navigation views that can be removed from the Navigation pane.
Button Configuration	Select this menu item to display the Button Configuration dialog box, where you can arrange the order of the navigation views.
Add or Remove Buttons	Select this menu item to display the list of views that can be displayed or hidden in the Navigation pane.

Customizing the Fonts and Colors

The default formatting for the Console display can be updated through the Customize dialog box. The available items to update depend on the category selected.

Step 1 Choose **Tools > Customize**.

Step 2 From the Category drop-down list in the Customize dialog box (see [Using the Actions Menu, page 2-5](#)), select any of the following items, as necessary:

Field	Description
Console	Updates the display of the Console panel caption
Navigator	Updates the display of the Navigation pane
Activity	Updates the displayed processes on the Operations—Activity view
Calendar	Updates the display of the Calendar dialog box
Target	Updates the display of the color status on targets in the Operations workspace.
Definition	Updates the color status of the processes in the Definitions workspace
Task	Updates the color status of tasks in the Operations—Task view

Step 3 Under Display items, select the item to be modified. The available items to update depend on the category selected.

Step 4 Modify the following items as necessary, then click **OK**.

Field	Description
Font	Provides font and font size display options
Foreground	Provides a list of colors to appear on different items in the foreground. Click Custom to define a color not displayed in the list.
Background	Provides a list of colors to appear on different items in the background. Click Custom to define a color not displayed in the list.
Gradient Start	Provides a list of colors to appear graded from top the bottom. Click Custom to define a color not displayed in the list.
Gradient End	Provides list of colors to appear graded from bottom to top. Click Custom to define a color not displayed in the list.

Matching a Regular Expression

The Match dialog box provides the ability to easily check the specified string text against a specified regular expression.

Step 1 In the Process Editor, choose **Tools > Regex Matcher**.

Step 2 In the Match dialog box, specify the following information to the regular expression:.

Field	Description
Source text	Enter the text to be validated against the specified regular expression.
Regular Expression	Specify a fixed string to represent the regular expression to be used in matching.
Match case	Check the check box to specify whether regular expression matching should be case-sensitive.
Matches found	Displays the matching regular expression.

Changing the Process Display Icon

The following steps provide instructions on how to change the icon for the process that displays in the Process Views.

Step 1 On the Process Properties pane, click the **Options** tab.

Step 2 Under Display, check the **Use custom icon** check box and click **Select Icon**.

- Step 3** In the Select Images dialog box, the currently selected icons display to the right of the of the fields. To the right of both Image fields (*Small* or *Large*), click “...” to change the icon, then click **OK**.
- Step 4** In the Select Image dialog box, use *one* of the following options:
- To choose from the display of default icons, on the Common tab, click the appropriate icon and then click **OK**.
 - To choose an icon from a different location, click the **Custom** tab.
 - To the right of the Image path field, click “...” to insert the file path to the appropriate icon.
 - In the Display Name field, enter the name of the icon and click **OK**.
- Step 5** Click **OK**.
-

Configuring the Display Refresh Rate

Use the Refresh tab to specify the refresh rate for the Activity and Process Views.



Note Use the scroll buttons to the right of the text fields to change the numeric display one second at a time.

- Step 1** Choose **Tools > Options**, then click the **Refresh** tab.
- Step 2** Under Refresh, select the appropriate process and activity instance refresh rate (see [Using the Actions Menu, page 2-5](#)), then click **OK**.
-

Configuring Columns

The Choose Columns dialog box determines which columns display for a selected navigation item and the order in which the columns display. The available column headings vary depending on the selected item.

- Step 1** In the Navigation pane, select the appropriate item.
- Step 2** In the Results pane, right-click and choose **Choose Columns**.
- Step 3** Under Columns, use one of the following options to select the appropriate column heading to display:
- Check the check box for the column heading.
 - Highlight the column heading and click **Show**.
- Step 4** Choose any of the following options:
- a. To remove a column heading from the display, use one of the following options:
 - Uncheck the check box.
 - Highlight the column heading and click Hide.

- b. To change the order in which a column appears in the results pane, select the column heading and click **Move Up** or **Move Down**.
- c. To determine the width of a column, select the column heading and specify a value in the **Width of selected** column field.
- d. To reset the column settings to the default, click **Reset**.

Step 5 Click **OK** to save the settings and close the dialog box.

Searching for an Object

The Find dialog box locates an item with specific text in the current view.

Step 1 Choose **Edit > Find**.

Step 2 In the **Find what** text field, enter specific terms for the search query.

Step 3 Check the following check boxes, as necessary:

- **Match case**—Selected when searching for term using the specific case in the **Find what** text field
- **Use regular expressions**—Select this item to query items that can contain special characters.

Step 4 Click one of the following buttons to begin the search:

- **Find Previous**—Locates previous match in the search query
- **Find Next**—Locates next match in the search query

Modifying the Console Time Zones

Use the Date & Times tab to specify the time zone that will be used to display date and time values throughout the application.


Step 1 Choose **Tools > Options**, then click the **Date & Times** tab.

Step 2 Under **Show dates and times using**, choose one of the following options to specify the time zone to be used, then click **OK**.

Field	Description
The current time zone of my computer	Select this radio button to display the date and time zone settings of the computer on which the application is installed.
The specified time zone	Select this radio button to select the time zone to be displayed throughout the application.

Enabling and Disabling an Object

Most objects are enabled by default. If an object is manually disabled, it must be enabled before it is available. The disabled object is not removed from the list of objects in the Definitions > [Objects] Results pane.

-
- Step 1** Choose **Definitions > [Objects]**.
- Step 2** Highlight the object, then in the Results pane, right-click and choose one of the following:
- **Enable**—The Enabled column on the Results pane changes to *True*.
 - **Disable**—The Enabled column on the Results pane changes to *False*.
- Step 3** If necessary, click the **Refresh**  tool to update the view.
-

Deleting an Object



Note

If the object definition is shipped as a part of product or you do not have the appropriate rights, the Delete option will be disabled.

Use the Definitions > [Object] view to delete an object.

Before deleting an object, access the object's properties and click the **Used By** tab to view where this object is being referenced. This ensures that deleting the object does not affect any processes or activities.

Notes

- The deletion process will fail if the object is referenced by other objects.
- A process variable is not completely deleted from a process until after the process has been saved.

Connecting to a Server

Use this option when you want to connect to a different server used for process monitoring.

-
- Step 1** Choose **File > Connect to Server**.
- Step 2** Choose a previously connected server from the Server drop-down list or enter the server's name, then click **OK**.

If the server is properly connected, the Cisco Process Orchestrator License Check dialog box displays. If the server does not properly connect, the Connect to Server dialog box displays.

Specifying Server Credentials

The Specify Credentials check box on the Select Server dialog box displays the login pane used for entering the information to authenticate the server connection.

-
- Step 1** Choose **File > Connect to Server**.
 - Step 2** In the Select Server dialog box, enter the server URL into the Server field or choose the server from the list.
 - Step 3** Check the **Specify Credentials** check box.
 - Step 4** Enter the user name required to access the server, the domain where the server resides, and the user password. Then click **OK**.
-

Displaying Recent Servers

The Recent Servers option displays all the servers recently accessed during the current session.

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- Step 1** Choose **File > Recent Servers**.
 - Step 2** To adjust the number of recent servers displayed:
 - a. Choose **Tools > Options > General > Most recently used servers**.
 - b. Enter the number of servers to display on the Recent Servers list on the File menu, then click **OK**.
-

Assigning Credentials to Processes and Activities

Assigning Credentials to Processes

Use the Credentials tab to specify the runtime user that should be used for execution.

-
- Step 1** Choose **Definitions > Processes**, right-click and choose Edit, or right-click Processes in the navigation pane and choose New Process.
 - Step 2** On the Process Editor properties, click the **Credentials** tab.
 - Step 3** Check the check box for the appropriate runtime user types to be included with the process.
 - Step 4** Click Select All to select all the available runtime users. Click the Unselect All to clear the selected runtime users availability for the process.
 - Step 5** In the Default runtime user section, select the appropriate runtime user that the process will run on by default.
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Assigning Credentials to Activities

Use the Credentials tab to specify the runtime user that should be used for execution.

-
- Step 1** In the Process Editor Toolbox, choose and drag and drop the activity onto the Workflow pane.
- Step 2** Click the **Credentials** tab to define the properties specific to the activity, including:
- Use target's default runtime user—The default runtime user account that contains the credentials to connect to the target.
 - Use process runtime user—Use the credentials for the runtime user that was specified for the process.
 - Override process runtime user—Specify different credentials than what are used for the process. The selected runtime user overrides the runtime user that was specified for the process.
 - Use dynamic runtime user with the specified properties—Specify the credentials in the following JSON format to be used during the activity execution, for example:
- ```
{
 "Type": "RuntimeUser",
 "UserName": "user1",
 "Password": "string",
 "Description": "string"
}
```
- The credentials are created dynamically for the specific activity and gets deleted automatically once the activity is completed. For more information on JSON format, see <http://localhost:51527/swagger/ui/index/>.
- Step 3** Enter the information in the remaining tabs as necessary, then click **Save** to complete the activity definition.
- 

## Modifying the Condition Branches

Use the Result Handlers tab to modify the list of condition branches on the process. You can add condition branches, specify the order of the condition branches, or remove condition branches from the process.

## Assigning a Category

- 
- Step 1** Choose **Definitions > Processes**, right-click and choose Edit, or right-click Processes in the navigation pane and choose New Process.
- Step 2** On the Process Editor properties, click the **Category** tab.
- Step 3** Click **Add** to launch the Select Categories dialog box and select the category to which the process is to be assigned.

## Suspending Server Automation

Use the Suspend Automation check box to suspend the execution of processes on the server. The enabled check box suspends any new process from being created and the server will no longer create instances of activities or processes.

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- Step 1** Choose **File > Environment Properties**.
- Step 2** In the Environment Properties dialog box, check the **Suspend automation** check box.
- 

## Viewing the Properties of an Object

To view information about an object, highlight the object, right-click and choose **Properties**.

Properties are organized by tabs. For example, the General tab can include information such as the object name of the object and type, its status, a brief description, and whether the object is enabled or disabled. The properties that are displayed depend on the object type.

## Viewing Activity Instance Properties

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- Step 1** Select any of the activity views to display the process and activity instances in the Results pane (for example, **Operations > Activity Views > View Triggered**).
- Step 2** In the Results pane, expand the appropriate instance to display the related activities.
- Step 3** Highlight the appropriate activity, and use *one* of the following methods:
- Double-click the appropriate activity instance.
  - Right-click and choose **Observe**.
  - From the Details pane, click any hyperlink (see [Details Pane, page 2-10](#)).
- Step 4** To view activity instance properties, in the Results pane, expand the appropriate instance to display the related activities.
- 

## Viewing Environment Properties

The Environment Properties option provides a view of the properties for the entire high availability Process Orchestrator environment.

To view the environment properties, choose **File > Environment Properties**.

## Viewing Runtime Usage Properties

The Runtime Usage tab shows the list of running processes that is currently using that specific queue resource.

| Field               | Description                                                                               |
|---------------------|-------------------------------------------------------------------------------------------|
| Display Name        | Displays the queue resource name.                                                         |
| Process Name        | Displays the processes that uses the queue resource.                                      |
| Process Instance ID | Displays the process IDs of the running processes.                                        |
| Priority            | Displays the priority set on the queue block.                                             |
| Description         | Displays how many seconds the queue resource has been in allocated state for the process. |

## Viewing the Used By Properties of an Object

Use the Used By tab to display the objects that directly reference the selected object in their configuration. Because the Used By tab displays objects in a tree view, you can also display the objects that directly reference the top level objects for the selected object.

The objects at the top level are the objects that reference the selected object directly, but you can expand the listed objects and see their referenced objects. For example, if *object A* is used by *objects X* and *Y* and *object X* is used by *object Q*, then on the property pages of *object A*, you will see *X* and *Y* listed. If you expand the (+) *object X*, then *object Q* will display.

- 
- Step 1** Click **Definitions > [Object]**, highlight the appropriate object, right-click and choose **Properties**.
  - Step 2** On the [Object] Properties property sheet, click the **Used By** tab to view the objects that use that object.
  - Step 3** Click **OK** to close the dialog.
- 

## Viewing the History of an Object

Use the History tab to view a history of changes that have been made to an object. This is a display-only tab that does not require any user interaction.

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- Step 1** Click the **History** tab to view the changes made to the object.

The following information about the history of the object is displayed:

| Column       | Description                                           |
|--------------|-------------------------------------------------------|
| Created by   | The user name of the person who created the object    |
| Created time | The date and time the object was created              |
| Time         | The date and time the action occurred                 |
| User         | The user name of the person that performed the action |




| Column      | Description                                     |
|-------------|-------------------------------------------------|
| Type        | The action that occurred                        |
| Description | Information about the action that was performed |


- Step 2** To view the audit history for a specific action, highlight the appropriate time, right-click and choose **Properties**.
- Step 3** Click **OK** to close the property sheet.

## Creating an Alert Task

Use the Alert task to create an alert regarding any potential problems. An alert reflects potential problems that a user might want to investigate and possibly diagnose the problem.

- Step 1** Choose **Operations > Task Views > New > IT Record > Alert**.
- Step 2** Click the **General** tab and enter the required information.
- Step 3** Click the **Alert** tab to enter the following criteria for the alert:
- Alert class—String or numeric value indicating the class of the alert.
  - Severity—Severity of the alert:
    - High—Interruption to critical business processes.
    - Normal—Interruption to the work of individual employees.
    - Low—Hindrane to the work of individual employees, continuation of work possible by means of a circumvented solution.
  - Automation Summary—Enter the file path for the related automation summary that was performed on the alert.
- Step 4** Click the **Affects** tab to specify the elements that trigger the selected target:
- This alert applies to the following target— Specify the affected target to be used in the activity.
  - Process target—Use the process target as the affected target in the activity.
  - Activity target—specify the affected target for a specific task activity.
    - Activity target—Select the activity containing the target that will be used. Only task activities will display in the list.
    - Specific target—Specify the affected target that will be used.
 

To view the properties for the selected target, click the **Properties**  tool. To create a new target, click **New > [Target]**.
    - Specific target group—Specify the affected target group that will be used.
 

To view the properties for the selected target group, click the **Properties**  tool. To create a new target group, click **New > [Target Group]**.

From the **Choose a target using this algorithm** drop-down list, specify which target will be chosen from the eligible target group members.

### Target Algorithms

Choose all targets that satisfy the specified criteria—Executes the process on all targets defined by the criteria specified in the Target Selection dialog box.

Choose any target that satisfies the specified criteria—Executes the process on any targets defined by the criteria specified in the Target Selection dialog box.

Choose the target with the specified name—Executes the process on the member of the group specified in the Name to match text field.

Select SAP target with the specified System ID—SAP System runs target against the SAP System database connection

- Choose the target with the specified name—Runs the process on the member of the group whose name is specified in **Name to match**.

- This applies to the following configuration item—Specify the configuration item to be used in the activity
- Name—Name of the configuration item (IT component) to which the alert pertains. For example, the name of a database server that failed or the name of a specific job that failed.
- Type—Enter the appropriate configuration item type or select the type of ITIL configuration item (IT component) from the list which the alert describes. For example, the type of the specific application element that failed (Application Server, Database, Host, or User).
- This is a CMDB reference—Indicate that the true source of the CI is in the CMDB, so the configuration item properties reference a CMDB entry.
- Object key—ID for the specific record in the CMDB that contains the configuration item
- Object source—Name for the specific record in the CMDB that contains the target configuration item
- Affected services—IT Service affected by the alert or incident
- Affected organizations—Organizations that consume the IT service affected by the alert or incident

**Step 5** Click the **Assignment** tab to manage the general task properties for the alert.

- Assigned to—User names assigned to the task
  - Add—Click **Add** to launch the Select Identity dialog box to add a user name to the list.  
Type the name of the assignee or to search for the assignee, click Browse to launch the Select User or Group dialog box to select the name of the person.
  - Remove—Select the user name and click this button to remove the user from list.
- Priority—Indicates the priority of the task
- Due date—Check the check box and select appropriate date the task should be completed from the drop-down calendar.
- Expiration date—Select the appropriate date the alert should expire from the drop-down calendar.

**Step 6** Click the **Notification** tab to specify the recipients to be notified when the task rule is executed.

**Step 7** Click the **Parameters** tab to define parameters for a specific task.

**Step 8** Click the **Notes** tab to enter any notes related to the task.

Click **Add** to launch the **Add Note Dialog Box** to add a specific set of notes to the task.

**Step 9** Click the **Categories** tab to assign an alert to a category or modify an existing assigned category for the task.

**Step 10** Click the **Related** tab to assign or modify an existing related task. The fields displayed depend on the task selected.

- Step 11** Click the **External** tab to specify the external incident information to support the synchronization between Cisco Process Orchestrator and the system that the customer is using.
- Step 12** Enter the information in the remaining tabs as necessary, then click **OK** to complete the task definition.
- 

## Creating an Approval Request Task

Use the Approval Request task to specify the user or group required to approve a task including the message associated for the approver.

- Step 1** Choose **Operations > Task Views > New > User Interaction > Approval Request**.
- Step 2** Click the **General** tab and enter the required information.
- Step 3** Click the **Approval** tab and enter the following criteria:
- **Message**—Message that informs the approver what is being requested
  - **Approval Choices**—The approval choices available (Add, Remove)
  - **Choice**—Enter the appropriate approval choice
- Step 4** Enter the information in the remaining tabs as necessary, then click **OK** to complete the task definition.
- 

## Creating a Change Request Task

Use the Change Request task to request a modification to the configuration of an object or system. Change requests are used to request system enhancements, report problems with a system, or report changes from one system which affects another system.

- Step 1** Choose **Operations > Task Views > New > IT Record > Change Request**.
- Step 2** Click the **General** tab and enter the required information.
- Step 3** Click the **Change Request** tab to enter the following criteria for the task:
- **Change request identifier**—Cisco Process Orchestrator generated ID number for the change request task
  - **Change request class**—Numeric value indicating the class of the change request
  - **Reason for change**—Describes the business justification for the request
  - **Change timing**—Enter the deadline date or time for the change
  - **Severity**—Severity of the change request (High, Normal, Low)
  - **Automation Summary**—Enter the file path for the related automation summary that was performed on the change request.
- Step 4** Enter the information in the remaining tabs as necessary, then click **OK** to complete the task definition.
-

# Creating a Guided Operation Task

Use the Guided Operations activity to detail the steps a user makes when handling an assigned task.

- 
- Step 1** Choose **Operations > Task Views > New > User Interaction > Guided Operation**.
- Step 2** Click the **General** tab and enter the required information.
- Step 3** Click the **Guided Operation** tab and enter the step-by-step process for handling the task.
- **Alert**—Alerts reflect potential problems that a user may want to investigate and possibly diagnose the problem
  - **Approval Request**—Specifies the message and choices for the assignee who is approving the task
  - **Guided Operation**—Details the steps a user takes to complete an assigned task
  - **Incident**—Task requires an operator to take action in order to resolve an issue
  - **Input Request**—Task requires input from an individual or group
  - **Review**—Task assigns a document for review
- Step 4** Enter the information in the remaining tabs as necessary, then click **OK** to complete the task definition.
- 


# Creating an Incident Task

Use the Incident task to create a create a task that requires an operator to take action in order to resolve an issue.


Click the hyperlink to display field descriptions for the appropriate tab. Click the hyperlink again to remove the displayed field descriptions.

- 
- Step 1** Choose **Operations > Task Views > New > IT Record > Incident**.
- Step 2** Click the **General** tab and enter the required information.
- Step 3** Click the **Incident** tab to enter the criteria for the incident.
- **Incident Identifier**—ID of the incident
  - **Reporting user**—User name of the individual who reported the incident and contact information of the user who called IT to report the problem
  - **Reporting user details**—Contact information of the individual who reported the incident
  - **Severity**—Severity of the incident (High, Normal, Low)
  - **Automation Summary**—Enter the file path for the related automation summary that was performed on the alert
- Step 4** Click the **Affects** tab to specify the elements that trigger the selected target:
- **This alert applies to the following target**— Specify the affected target to be used in the activity.
  - **Process target**—Use the process target as the affected target in the activity.
  - **Activity target**—specify the affected target for a specific task activity.
    - **Activity target**—Select the activity containing the target that will be used. Only task activities will display in the list.

- Specific target—Specify the affected target that will be used.

To view the properties for the selected target, click the **Properties**  tool. To create a new target, click **New > [Target]**.

- Specific target group—Specify the affected target group that will be used.

To view the properties for the selected target group, click the **Properties**  tool. To create a new target group, click **New > [Target Group]**.

From the **Choose a target using this algorithm** drop-down list, specify which target will be chosen from the eligible target group members.

- Choose the target with the specified name—Runs the process on the member of the group whose name is specified in **Name to match**.
- This applies to the following configuration item—Specify the configuration item to be used in the activity
- Name—Name of the configuration item (IT component) to which the alert pertains. For example, the name of a database server that failed or the name of a specific job that failed.
- Type—Enter the appropriate configuration item type or select the type of ITIL configuration item (IT component) from the list which the alert describes. For example, the type of the specific application element that failed (Application Server, Database, Host, or User).
- This is a CMDB reference—Indicate that the true source of the CI is in the CMDB, so the configuration item properties reference a CMDB entry.
- Object key—ID for the specific record in the CMDB that contains the configuration item
- Object source—Name for the specific record in the CMDB that contains the target configuration item
- Affected services—IT Service affected by the alert or incident
- Affected organizations—Organizations that consume the IT service affected by the alert or incident

**Step 5** Click the **Related** tab to assign or modify alerts that originated the incident.

**Step 6** Enter the information in the remaining tabs as necessary, then click **OK** to complete the task definition.

## Creating an Input Request Task

Use the Input Request task to create a set of questions requiring a user or group response in order to gather a large set of information.

**Step 1** Choose **Operations > Task Views > New > User Interaction > Input Request**.

**Step 2** Click the **General** tab and enter the required information.

**Step 3** Click the **Questions** tab and enter the following criteria for the input request:

- Input request message—Introductory message for the input request
- Questions presented on the input request—Displays the input request question properties
  - Question—Input request question
  - Type—Type of question (text, select, check box)
  - Default Value—Default answer for the question

- **New**—Use this option to create a specific type of input request question. Click **New** each time to create additional questions for the input request.
    - **Text**—Launches the Text Question Properties dialog box to allow the user to define a text question.
    - **Hidden value text**—Launches the New Hidden Text Properties dialog box to allow the user to define a question requiring an encrypted value as a response.
    - **Check box**—Launches the Check box Question Properties dialog box to allow the user to define a question utilizing a check box.
    - **Select**—Launches the Select Question Properties dialog box to allow the user to define a text question.
  - **Properties**—Modifies the properties for the question.
- Step 4** Enter the information in the remaining tabs as necessary, then click **OK** to complete the task definition.
- 

## Creating a Review Task

Use the Review task to submit a document for review as well as provide a message for the reviewer.

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- Step 1** Choose **Operations > Task Views > New > User Interaction > Review**.
- Step 2** Click the **General** tab and enter the required information.
- Step 3** Click the **Review** tab to enter the following criteria for the review request:
- **Message**—Read-only display of message that informs the reviewer what is being requested
  - **Document to review**—Click **Browse** to locate document or automation summary to be reviewed. The following example is the display for the file path for the document.  
C:/Documents and Settings/user name/My Documents/
- Step 4** Enter the information in the remaining tabs as necessary, then click **OK** to complete the task definition.
- 

## Adding a Related Task

Related tasks could be duplicates of one another or the resolution of the task is dependent on the solution of the existing task.

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- Step 1** Choose **Operations > Tasks Views**, highlight the appropriate task, right-click and choose **Properties**.
- Step 2** Click the **Related** tab to modify the list of tasks related to the opened task.
- Step 3** Click **Add** to launch the Select Task dialog box.
- Step 4** Use *one* of the methods to choose a category:
- To choose a single category, highlight the appropriate category.
  - To choose multiple categories, press **CTRL** and hold the key while making the appropriate selections.

- Click **New** to create a new related task.

**Step 5** Click **OK** to close the dialog box.



**Note** On the **Related** tab, you can click **Remove** to remove the task from the list. This action does not delete the task from the system.

## Adding an Option to the Input Request Select Question

Use the following steps to create options for the Select question. Repeat the steps for each additional option.

**Step 1** On the **New Select Properties** dialog box, click **New**.

**Step 2** Enter the label name and value for the selection, then click **OK**.

The new selection displays on the **New Select Properties** dialog box under the **Selections** area.

## Assigning a Category to a Task

**Step 1** Choose **Operations > Tasks Views**, highlight the appropriate task, right-click and choose **Properties**.

**Step 2** Click the **Categories** tab to modify the list of categories assigned to the task.

**Step 3** Click **Add** to launch the **Select Categories** dialog box.

**Step 4** Use *one* of the methods to choose a category, then click **OK**.

- To select a single category, highlight the appropriate category.
- To select multiple categories, press **CTRL** and hold the key while making the appropriate selections.



**Note** On the **Related** tab, you can click **Remove** to remove the category from the list. This action does not delete the category from the system.

## Assigning a Duplicate Alert

This task can be auto-populated if the duplicate task criteria defined in the **Create Alert** activity has been met.

**Step 1** Choose **Operations > Tasks Views**, highlight the appropriate task, right-click and choose **Properties**.

**Step 2** Click the **Related** tab to indicate the task is a duplicate of another task.

**Step 3** Click **Browse** to launch the Select Tasks dialog box.

**Step 4** Use *one* of the following to choose a duplicate task, then click **OK**.

- To choose a single task, highlight the appropriate task.
- To choose multiple tasks, press **CTRL** and hold the key while making the appropriate selections.
- Click **New** to create a new task.



**Note** On the Related tab, you can click **Remove** to remove the selected task from the field. This action does not delete the task from the system.

## Creating a Check Box Question

Use a Check Box question in an Input Request task to check a specific selection to a defined question. For example, create this task type to allow assignees to respond with an answer such as *True/False* or *Yes/No* to the question.

**Step 1** Choose the **Input Request > Questions** tab, click **New > Check Box**.

**Step 2** Enter the following information to create or modify questions that contain a check box:

- ID—Unique ID for the input request question (Default: Q1)
- Question—The question for the input request
- Default value—Default value to be used for the question

**Step 3** Click **OK** to create the new question.

The new question displays on Input Request > Questions tab under the Questions presented on the input request area.

## Creating a Hidden Text Question

Use the Hidden Text Properties dialog to create or modify Hidden text questions for an input request. An example of an encrypted value includes values such as passwords.

An encrypted value will be available from the Insert Variable Reference dialog and can be used in providing a response to the Hidden text question. The encrypted value is only to be used when the question type is a Hidden text question.

**Step 1** Choose **Input Request > Questions**, then click **New > Hidden Text**.

**Step 2** Enter the following information for the question:

- ID—Unique ID for the input request question (Default: Q1)
- Question—The question for the input request



**Step 3** Click **OK** to create the new question.

---

## Creating a Select Question

A Select question in an Input Request task allows the user to choose a single option from a list of answers to a defined question.

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**Step 1** Choose **Input Request > Questions**, then click **New > Select**.

**Step 2** Enter the following information to create or modify questions that contain a check box:

- ID—Unique ID for the input request question (Default: Q1)
- Question—Enter the question for the input request
- Selections—Displays the input request question properties:
  - Label—Input request question
  - Value—Default answer for the question
  - New—Use this option to launch the Select Choice dialog box to create a selection for the input request question. For additional information, see [Adding an Option to the Input Request Select Question, page 9-23](#).
- Properties—Modifies the properties for the selected option
- Delete—Removes the selected option from the list

**Step 3** Click **OK** to create the new question.

The new question displays on Input Request > Questions tab under the Questions presented on the input request section.

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## Creating a Text Question

A Text question in an Input Request task allows the user to enter a text or numeric value to the question.

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**Step 1** Choose **Input Request > Questions**, then click **New > Text**.

**Step 2** Enter the following information for the text question:

- ID—Unique ID for the input request question (Default: Q1)
- Question—The question for the input request
- Default value—Default value to be used for the question

**Step 3** Click **OK** to create the new question.

The new question displays on Input Request > Questions tab under the Questions presented on the input request area.

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## Manually Changing the Status

- 
- Step 1** Choose **Operations > Tasks Views**, then highlight the appropriate task, right-click and choose **Properties**.
- Step 2** Click the **General** tab and enter the following information, then click **OK**.
- Display name—Name of the task
  - Status—Choose the appropriate status of the task. The statuses displayed depend on the currently open task.
  - Description—Brief description of the task
- 

## Modifying the Assignment Properties for a Task

Use the following steps to change the assignee or other assignment properties for the task. This includes taking ownership of the task, if necessary.

- 
- Step 1** Choose **Operations > Tasks Views**, highlight the appropriate task, right-click and choose **Properties**.
- Step 2** Click the **Assignment** tab to modify the assignment properties for the task.
- Step 3** Under **Assigned to**, change the list owners for the task.
- Step 4** Modify the task priority, the date the task should be completed, and the expiration date, then click **OK**.
- 

## Specifying Parameters for a Task

A single task can include up to 10 parameters.

- 
- Step 1** Choose **Operations > Tasks Views**, highlight the appropriate task, right-click and choose **Properties**.
- Step 2** Click the **Parameters** tab, then click **Add**.
- Step 3** Enter the appropriate information for the task, then click **OK**.
- 

## Resolving a Task

### Before You Begin

Only users with administrative rights can update tasks from the **Operations > Task** view in Cisco Process Orchestrator.

- 
- Step 1** Choose **Operations > Tasks Views**, highlight the appropriate task, right-click and choose *one* of the following:

- Resolve
- Select a choice

**Step 2** From the Status drop-down list, choose the appropriate status for the task resolution, then click **Submit**.

---

## Viewing Task History

Use the History tab to view a history of changes that have been made to the task.

- 
- Step 1** Choose **Operations > Task**, highlight the appropriate task, right-click and choose **Properties**.
- Step 2** Click the **History** tab to view the changes made to the task.
- Step 3** To view the audit history for a specific action, highlight the appropriate item, right-click and choose **Properties** to display the Audit Properties dialog box.
- Step 4** Click **OK** to close the dialog box.
- 

## Reversing Process Changes

This item is used when changes have been made to the process definition, but are no longer necessary. This option deletes all changes made since you last saved the process. If you have saved the process and have not made any additional changes, then no action will be taken.

To reverse process changes, choose **File > Revert**.

The process reverts back to the last saved version of the process. All activities, components, and other changes are removed from the process definition.

## Deleting a Calendar

Choose **Definitions > Calendars** to delete calendars that are no longer used. Before deleting a calendar, access the properties, then select the **Used By** tab to view where objects are being used by the calendar. The calendar deletion process fails if the calendar is used by another object.

If the calendar definition is a core product or the user does not have the appropriate rights, the *Delete* option will be disabled.

## Removing Dates from a Calendar List

- 
- Step 1** Choose **Definitions > Calendars**, highlight the appropriate calendar, right-click, and choose **Properties**.

To remove a calendar from either list, highlight the appropriate calendar and click **Remove**.

Certain features of the property pages may display as display-only if the calendar definition is shipped as part of an automation pack or the user does not have the appropriate rights.

- Step 2** Click the **Dates** tab, highlight the appropriate date, and drag it onto the calendar displayed to the right.
- Step 3** Click the **Preview** tab to review the schedule, then click **OK**.

## Applying a Value to a Target-Specific Target Property

Use the Target Values tab to specify a target property value for a specific target. This values overrides the default target property value.


- Step 1** Choose **Definitions > Target Properties**, highlight the appropriate target property, right-click and choose **Properties**.
- Step 2** Click the **Target Values** tab to specify a target property value for a specific target.
- Step 3** Click **New** to launch the Target Properties dialog box.
- Step 4** To add a specific target to the target property, click **Add** to launch the Select Targets dialog box.
- Step 5** On the Select Targets dialog box, select the targets to be added to the target property.
- Step 6** Use the Value field to modify the value assigned to the targets assigned to the target property. The fields displayed depend on the type of extended target property.
- Step 7** Click **OK** to close the dialog box.

## Viewing Target Properties

Use the Definitions—Target Properties view to access the properties of the target property.

- Step 1** Choose **Definitions > Target Properties**, highlight the appropriate target property, right-click and choose **Properties**.
- Step 2** Click the **General** tab to view information such as Target name, owner, data type, and description.
- Step 3** Click the **Group** tab to view information about the primary property group name, secondary property group name, and the grouping index.
- Step 4** Click the **Target Types** tab to view the information about the Target types that are chosen.

## Inserting Reference Variables

The Reference  icon displayed next to a text field indicates that the field can be populated by referencing a defined variable or the property of another activity or process. Use the Insert Variable Reference dialog box to select a defined variable or reference an object to populate a field. The OK button does not activate until a valid property or variable is selected.

Depending on the object type, some of these variables might not be available.

| Reference Variable              | Description                                                                                   |
|---------------------------------|-----------------------------------------------------------------------------------------------|
| Notes                           | Description for the virtual machine                                                           |
| Name                            | Display name of the object                                                                    |
| Created by / Owner              | User name or the owner of the object                                                          |
| Creation Time                   | The date and time the object was created                                                      |
| Modified by                     | User name of the individual who modified the object                                           |
| Modification Time               | The date and time the object was modified                                                     |
| Type                            | Type of object                                                                                |
| Is Normal Status                | Status is normal and indicates that there are no known problems with this object              |
| Is Unreachable Status           | Status is unreachable which indicates that there are no known problems with this object       |
| Status Information              | Detailed information regarding the target status and the reasons for object being unreachable |
| Target ID                       | ID number assigned to the object                                                              |
| Authentication                  | String used by the client for authentication                                                  |
| Polling interval                | Interval to query the system                                                                  |
| Port                            | Port number used to access the server port                                                    |
| Server                          | Host name or the IP address of object server                                                  |
| Description                     | Description of the activity                                                                   |
| Audit Starts                    | Date and time the process audit starts                                                        |
| Audit Successes                 | Indicates the number of successful audits                                                     |
| End Time                        | Date and time the activity stopped                                                            |
| Error Information               | Description of the error that has occurred                                                    |
| Group Name                      | Name of toolbox activity group                                                                |
| Instance Canceled               | Indicates the process was canceled manually                                                   |
| Instance Failed                 | Indicates the process has failed                                                              |
| Instance Failed (Completed)     | Indicates the process has failed but the process execution was completed                      |
| Instance Failed (Not Completed) | Indicates the process has failed and did not complete the process execution                   |
| Start Time                      | Date and time the activity was started                                                        |
| Process Id                      | ID number of the Process Orchestrator process                                                 |
| Process Instance Id             | ID number of the Process Orchestrator process instance                                        |
| Entry ID                        | ID number assigned to the object entry                                                        |
| Incident Id                     | Incident ID of the object property                                                            |
| Back Link Id                    | ID number assigned to the first item in the item relationship                                 |

|                 |                                                                |
|-----------------|----------------------------------------------------------------|
| Forward Link Id | ID number assigned to the second item in the item relationship |
| Work Info Id    | ID number of the work info entry                               |
| Results         | Results of the activity                                        |
| Field Values    | Value of the property                                          |