Ultimus DPA Portal Help

Issued with

Ultimus Digital Process Automation Suite 2026

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Assumptions about the reader

This document makes the following assumptions about the reader:

- The person installing, administering or maintaining the Ultimus product (referred henceforth as “the reader”) has an **extensive understanding** and knowledge of the customer-specific **Ultimus environment**.
- The reader is a **network administrator or IT professional**: an individual who oversees the installation (and possibly deployment and maintenance) of enterprise-class software.
- The reader is an experienced Microsoft Windows user who is familiar with working within the Microsoft Windows environment.
- The reader has full **Administrator rights** on all computers within the organization and can make changes to **LAN security and configuration**.
- The reader is **knowledgeable in configuring any hardware or software firewall** tools the organization has in place. Communication among Ultimus modules in a firewall-enabled environment is incumbent upon the **network administrator** to properly configure.

For up-to-date information about changes to supported technologies, see the *Ultimus Supported Technologies* document on the **Ultimus Customer Portal**.

Contacting Ultimus

Ultimus is striving to improve its products and support services.

Visit the **Ultimus Customer Portal** to contact our experts to resolve your technical issues, to get answers to common and specific questions, and to download the latest product builds and documentation.

- To **create or view a support case**, go to **www.ultimussupport.com**, or visit the Ultimus Customer Portal **Ultimus Customer Portal/Cases** section.
- Visit the **Ultimus Knowledge Services** section to learn about our **trainings and certifications** on the latest Ultimus products which provide you with up-to-date knowledge on the latest product releases, or contact us at training@ultimus.com.
- Use our contact form to **Contact Ultimus Support** directly.
- Visit the **Ideas** section to submit a **product enhancement idea**, feature concept, or send your feedback about how we can improve our technical documentation and online helps.

Introduction

Ultimus DPA Portal is a browser-based application installed on a remote server and accessed through the internal network connection, or through the Internet. DPA Portal users can log in from any Internet-connected mobile or desktop device type that are supported by the company, provided they have a compatible operation system and browser version installed.

This document explains how to use **Ultimus DPA Portal**.

- Accessing the Ultimus DPA Portal
- Navigating in the Ultimus DPA Portal
- Working in the Ultimus DPA Portal

The performance of the DPA Portal can be influenced by external conditions such as connection bandwidth and network quality.

Accessing the Ultimus DPA Portal

This section outlines how to log in and log out of the Ultimus DPA Portal.

- Logging in to the Ultimus DPA Portal
- Logging in to the Ultimus DPA Portal as a different user
- Logging out of the Ultimus DPA Portal

Access rights, **user accounts** and **access levels** are managed by your organization. Please contact the **application support** at your organization if you do not know the Ultimus DPA Portal **website URL**, or cannot access the Portal.

The **DPA Portal content** will display correctly only if a supported **operating system** and **browser version** are installed.

The DPA Portal is **accessible on any device** supported by your organization.

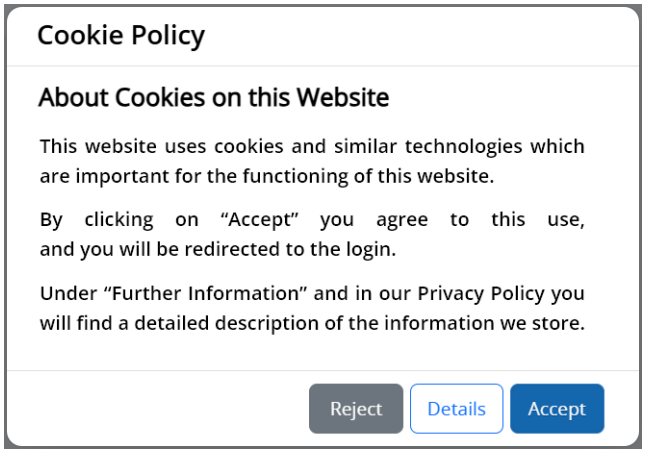
To **access** the Ultimus DPA Portal **faster**, create a **shortcut** on your desktop/home screen.

Logging in to the Ultimus DPA Portal

To log in to Ultimus DPA Portal, do the following:

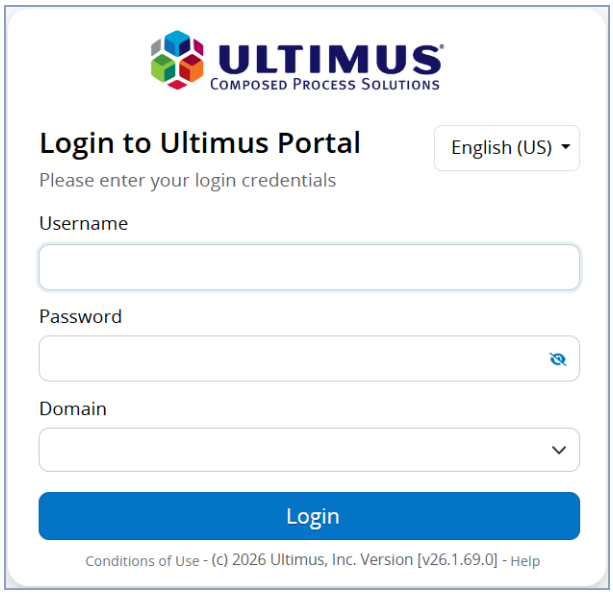
1. Open the **Ultimus DPA Portal website URL** provided by your organization in a supported **web browser**.
2. The application checks for DPA Portal **website cookies** on your computer.
   If none is found, a **cookie consent** message appears:
   - Click **Accept** to consent, and proceed to the login page.
     To read more on how the website uses cookies, click **Details**.

Your browser might request **permission** to share your exact **location** with the Ultimus DPA Portal website. To permit this, click *Allow*.



3. The **Ultimus DPA Portal login** dialog box appears.
   Type in the following information and when finished, click **Login**:
   - **User ID** and **Password**: your Ultimus account user name and password.
   - **Domain**: Select the domain in which your Ultimus account resides.
   - **Remember Me**: If selected, the Ultimus DPA Portal saves your User ID and domain selection for the next login.
   - **Language**: Select the preferred display language.
   - **Help**: Open the ***Ultimus DPA Portal Help*** in a new browser tab.
   - **Conditions of Use**: Opens the *End User License Agreement* in a new browser tab.

Certain options may not appear on your login screen due to organizational policies.



Once logged in to the DPA Portal, your starting page is shown; this is either the DPA Portal Dashboard or a View/Folder.

- To get to know more about the Ultimus DPA Portal user interface and how to use it, see section Navigating in the Ultimus DPA Portal or section The Ultimus DPA Portal user interface.
- For instructions on how to work in the Ultimus DPA Portal in general, see section Working in the Ultimus DPA Portal.

Before attempting to access the Ultimus DPA Portal website, make sure your device is connected to the internet.

Access rights, **user accounts** and **access levels** are managed by your organization.
Please contact the **application support** at your organization if you do not know the Ultimus DPA Portal **website URL**, or cannot access the Portal.

The DPA Portal **website content** will display correctly only if a both a **supported operating system** and a compatible **browser version** are installed.

The **DPA Portal starting page** can be set by the Ultimus Administrator, or by the logged-in user (in **Menu** >> **Settings**).
Central settings can **overwrite** local settings.

The DPA Portal is **accessible on any device** supported by your organization.

You can be logged on in **multiple DPA Portal instances** simultaneously from the **same** device or browser, as well as from **different** devices, different web browsers, and/or browser windows/tabs.

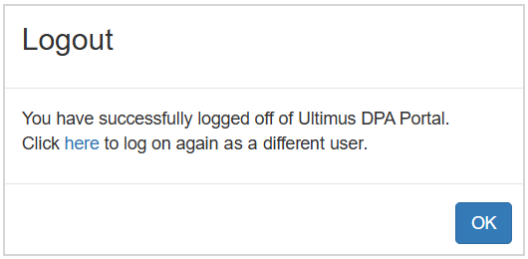
To **access** the Ultimus DPA Portal **faster**, create a **shortcut** on your desktop/home screen.

Logging in to the Ultimus DPA Portal as a different user

If **Single sign-on (SSO)** is enabled in your Ultimus environment, you can log in as a different user after having logged out of the DPA Portal.

To log in to the DPA Portal with different credentials, do the following:

1. Select the **Login As**... option in the DPA Portal **Menu** ( ).
   This terminate all your active sessions.
2. When the following **logout message** appears, click on the word '*here*': the hyperlink redirects you to the login screen where you can provide the user credentials.



If **SSO** is disabled, the DPA Portal **Menu** ( ) does not include the **Login As**... option.

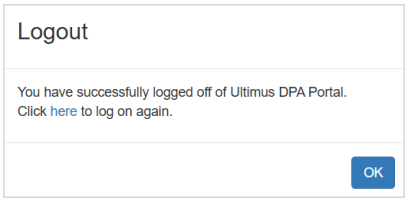
Logging out of the Ultimus DPA Portal

To log out of the DPA Portal, **do one of the following**:

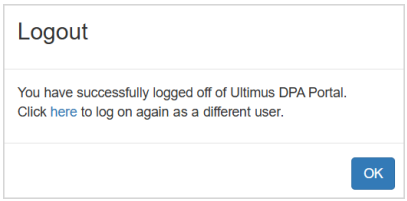
- Select the **Log Out** option in the **DPA Portal Menu** ( ).
- Close the web browser application/window/tab.

If the active session has been terminated successfully, one of the following messages is displayed:

- **If SSO is disabled**:



- **If SSO is enabled**:



Single sign-on (SSO) is a technology which combines several different application login screens into one. Your administrator may disable or enable the use of SSO for Ultimus DPA Portal.
- If **SSO** is **disabled**, your other active sessions remain active even after you log out of one of them.
- If **SSO** is **enabled**, logging out of one of your active sessions terminates all other sessions too.

Navigating in the Ultimus DPA Portal

The following sections describe how to use the Ultimus DPA Portal user interface.

- The Ultimus DPA Portal starting page
- Highlights
- Mouse and touch gestures
- Messages and Notifications
- User interface element types
- Main user interface components
- The DPA Portal Header Pane
- The DPA Portal Navigation Pane
- The Ultimus DPA Portal View/Folder interface
- The Ultimus DPA Portal Dashboard

⚠ The DPA Portal website content will be displayed correctly only if both a supported **operating system** and a compatible **browser version** are installed.

ℹ The **DPA Portal main interface** supports **browser controls** as well as the **mouse** and the **keyboard** for navigation.

The Ultimus DPA Portal starting page

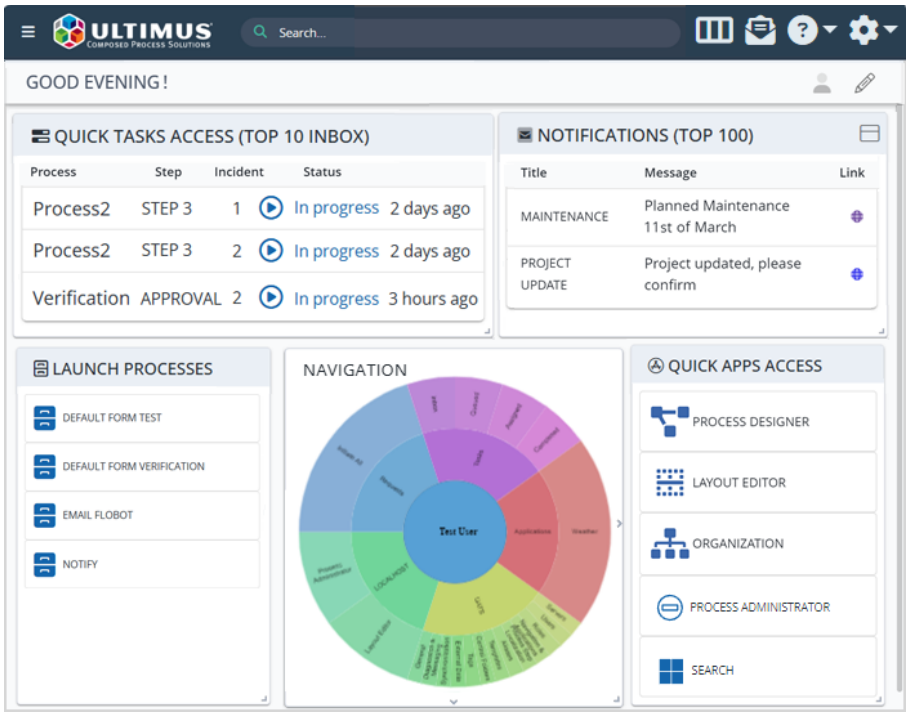
Once logged in to Ultimus DPA Portal, the default **Starting Page** is shown as set by the Ultimus administrator, or individually by the logged-on user.

- If the **DPA Portal Dashboard** page is enabled in by your Administrator, it may be set as default Starting Page.
- Alternatively, a **View** or a **Folder** can be set as default starting page.

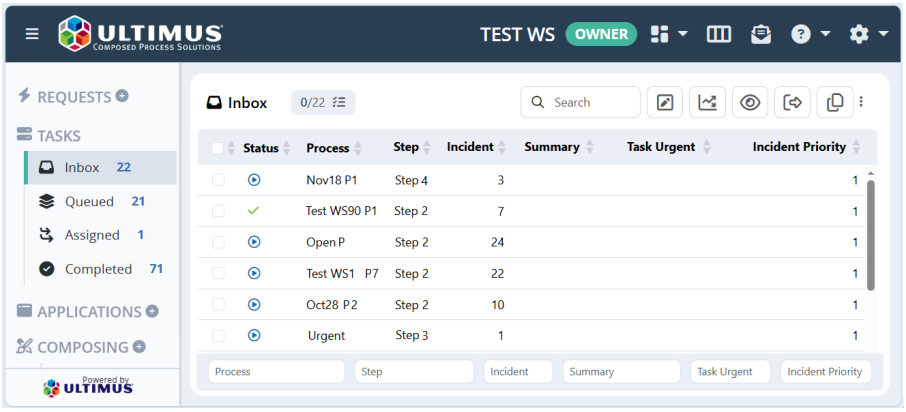
Examples:

- The **DPA Portal Dashboard** set as starting page:

Only available if enabled by your Ultimus Administrator.



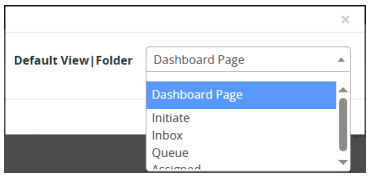
- The **Inbox** View set as starting page:



Setting the default Starting Page

To set the default starting page for the Ultimus DPA Portal do the following:

1. Open the DPA Portal **Menu** ( ) >> **Settings** .
2. From the **drop-down** list, **select** a Navigation Item to use as your starting page.
3. Click **OK** to save changes, or click **Close** to exit without saving changes.



Highlights

⚠ The DPA Portal website content will be displayed correctly only if both a supported **operating system** and a compatible **browser version** are installed.

- The Ultimus DPA Portal content is displayed in a single browser window by default.
  However, **Tasks** and **Applications** may be configured to display in a new window, or in a new tab.
- **Browser controls** are supported for navigation - except for content that is configured to open in a pop-up window (the supported controls are displayed in the pop-up window as well).
- Depending on the configuration, clicking the name of an **Application** in the **Navigation Pane** may open the Application **full-screen**, with the **Navigation Pane hidden**.
  - To **display** or **hide** the **Navigation Pane**, use the three-line button () located in the top-left corner.
- To **open a Task**, select the Task then click **Open Task** ( ).
  Alternatively, **double-click** a Task to open for editing.
- To **select multiple Tasks**, select the checkbox next to each Task.
  This is useful when copying multiple tasks into a Folder.
- To **reload** and update the DPA Portal **content**, click **Menu** () » **Refresh**.
- To **return** to the DPA Portal **Dashboard** from anywhere in DPA Portal, click the **Dashboard** button ().
- To **display** or **hide** the Navigation Pane, use the three-line button () located in the top-left corner.

Mouse and touch gestures

The **DPA Portal main interface** supports **browser controls** as well as the **mouse** and the **keyboard** for navigation.

The following table contains the most frequently used **mouse and touch gestures** supported when using the Ultimus DPA Portal.

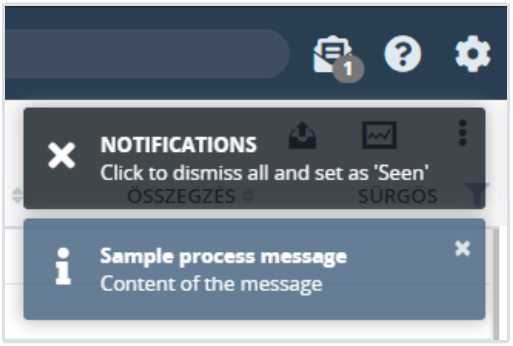
The layout of the **DPA Portal Dashboard** may be slightly different on touch screens.

Touch gesture	Mouse gesture	Description
Tap	Click	Typically it is used to initiate an action. For example to activate a button or a menu item, to follow a hyperlink, to open a menu or a drop-down list, to mark the starting point of a text input, or to select an item (a Task or a checkbox).
Double-tap	Double-click	Typically it is used to extend an action on a selected item (e.g. to open the selected Task), or to open the item-specific menu of an item (not applicable in DPA Portal).
Swipe	Mouse-wheel scroll or Arrow key scroll	It is used to navigate within the boundaries of a display or a list. For example when viewing screen content larger than the screen.
Press and hold	Right-click	Typically it is used to call the list of the item-specific actions for an item (context menu). This gesture may not be interpreted in your DPA Portal interface.
Drag (with one finger)	Mouse drag	Press and hold while you move the item to a new position, then release the item above the designated location. (*drag&drop*)
Pinch-to-zoom	Mouse wheel scroll with key or mouse button press	Touch Gesture: press and hold with two fingers while moving them apart (Zoom in) or toward each other (Zoom out). Mouse wheel + Key/Mouse button press: zoom in or out by turning the mouse wheel while holding the Alt or Ctrl key or the primary mouse button (left or right button).

Messages and Notifications

System messages are sent to all DPA Portal users by your Administrator. These type of messages display always on top of the opened View/Folder, in a pop-up window.

DPA Portal notifications are displayed over the other DPA Portal content as well as in the Notifications panel.



- You can read notification right away, then close the pop-up, or read the notification later.
  The **envelope** icon in the **top-right** corner shows the number of **unread** Portal notifications:



- **To view the content of an unread Portal Notification**, click the envelope icon.
- **To close any message or notification**, click the **X** in the corner.

User interface element types

The Ultimus DPA Portal interface has **general** (“built-in”) elements and **custom** elements.

General user interface elements and actions are available to all DPA Portal users in all Ultimus environments. For example, “built-in” Views, general **Menu** () options, View/Folder actions, Task list actions and Task actions.

Custom user interface elements and actions are specific to the Ultimus DPA Portal version deployed in a customized Ultimus environment. The actions and elements are specific to the deployment environment and made available based on various attributes, for example user Role(s). Custom elements are configured to meet specific requirements and principles at a company, such as workflow, design, or functional elements. For example Business/Workspace **Process Forms** and actions, DPA Portal **Application** content and actions, **custom Views**/**Folders**, centrally enabled and configured **DPA Portal Dashboard** content and actions, **Navigation Pane** items.

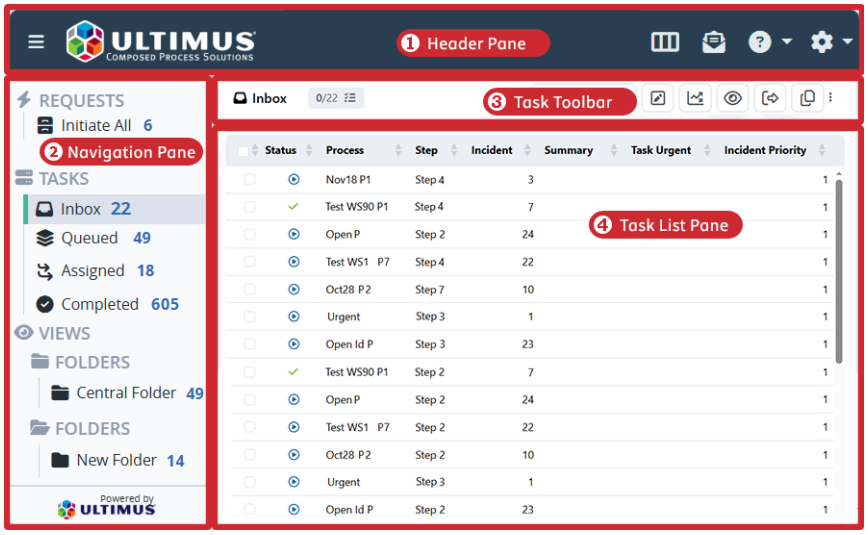
This document outlines the **general** elements and actions of the user interface.
For detailed instructions on working with custom **Applications**, **Solutions**, or Processes specific to your company, please refer to the relevant **Help** documents accessible via the DPA Portal **Menu** ().

Main user interface components

The DPA Portal interface has four main components.

- The **Header Pane** (1) and the **Navigation Pane** (2) visible when using the application.
- The **Task Toolbar** (3) and the **Task List Pane** (4) are not visible if one of the following is open: a Task (Form), the DPA Portal Dashboard, the content of an Application.

Click the links to jump to the relevant section.



The DPA Portal Header Pane

The **Header Pane** is the shown on the top of the Ultimus DPA Portal interface.

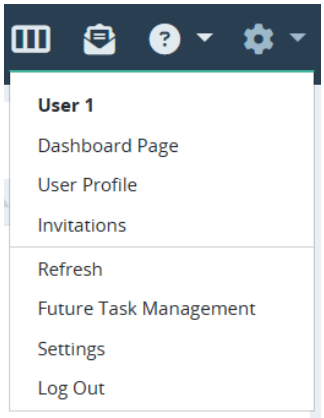


The **Header Pane** contains the following elements:

	Hides or displays the **Navigation Pane**. Its position is saved upon exiting the DPA Portal.
	Opens the **DPA Portal Dashboard**.
	Shows the *number* of unread **DPA Portal Notifications**. When clicked on, shows the *list* of unread Portal Notifications.
	If clicked on outside Tasks and Applications, it opens the general **Ultimus DPA Portal Help** documentation. If clicked on when working on a Task (Form) or in an Application, a more specific documentation is shown (if available). Such as: **Application Help**, **Solution Help**, **Process Help**, or **Step/Task Help**.
	When clicked on, the DPA Porttal main **Menu** contains the available DPA Portal options available in that location for the logged-on user.

The content of the **DPA Portal main Menu** () depends on the content of the active screen, which is determined by the attributes of the logged-on user, such as user Roles, Group memberships, or Applications.

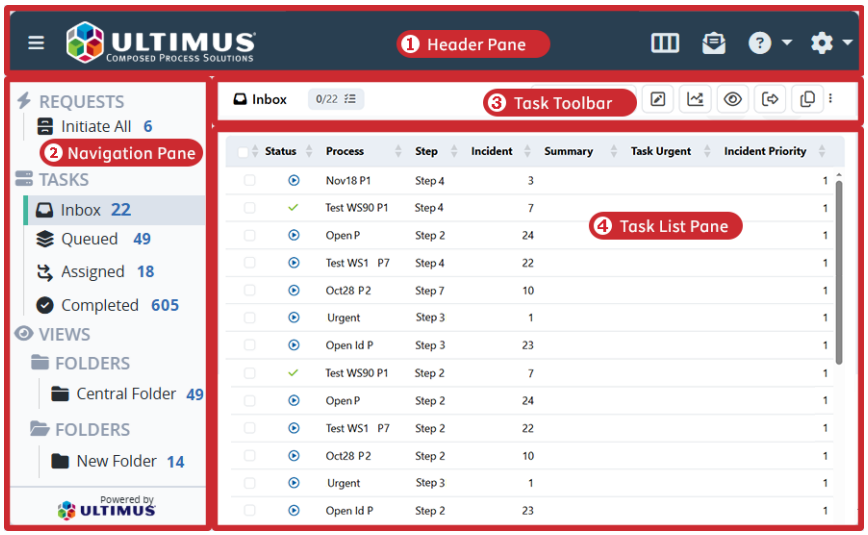
For example, the Menu - with the conditional item marked - may show the following options in **Inbox** view:



- **Dashboard Page**: Opens the DPA Portal *Dashboard* (same as )
  See also: The Ultimus DPA Portal Dashboard.
- **User Profile**: Opens the *My Profile* page with your user information.
- **Invitations**: Only shown if available for the logged-on user - the *Workspace Invitation* list.
  See also: Working with Workspaces.
- **Refresh**: Updates the content of the active screen with the latest data from the server.
- **New Folder**: Opens the *New Folder* dialog box.
  See also: Working with User Folders.
- **Future Task Management**: Opens the *Future Task Management* dialog box.
  See also: Working with Task processing user Rules and Conditions.
- **Settings**: Opens the *Ultimus DPA Portal Configuration* dialog box, where you can set the default starting page displayed by default when logging into Ultimus DPA Portal.
  See also: The Ultimus DPA Portal starting page.
- **Log Out** (or **Login As...**): Logs you out of DPA Portal.
  See also: Accessing the Ultimus DPA Portal.

The DPA Portal Navigation Pane

The DPA Portal **Navigation Pane** (2) shows a *structured* list of *navigation items* that represent the content you have *access to* based on your user attributes (e.g. Role), as determined by your Ultimus Administrator.

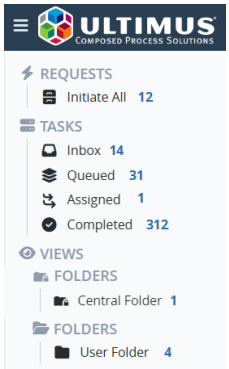


- To **hide** or **display** the **Navigation Pane**, use the **3-line** button ( ) located in the top-left corner. This setting is saved upon exiting the DPA Portal.
- To **expand** or **collapse** the content of a **navigation node**, click the name of the node.

Navigation Pane structure and content

The **custom** navigation items and their placement in the Navigation Pane are managed by your Ultimus Administrator, while the general (*built-in*) items have a fixed placement as default elements of the Ultimus DPA Portal user interface. **Navigation items** may be organized into **navigation nodes**, or added as **single** items.

The following example shows the **general structure and content of the DPA Portal Navigation Pane**:



General (*built-in*) **navigation items**:

- **REQUESTS** node:
  - **Initiate All** View, showing all workflow Processes you are allowed to initiate.
  - **Tagged** Views (if available) are sub-views that organize the content of the Initiate All View, based on e.g. workflow type, work area or any custom condition. Tagged Views are custom Views managed by your Ultimus Administrator.
- **TASKS** node:
  - **Inbox** View: Shows the list of Tasks assigned to the logged-on user (as *Process Step Recipient*).
  - **Queued** View: Shows the list of Tasks assigned to the members of a specific user Group (as *Process Step Recipient*).
  - **Assigned** View: Shows a list of Tasks that are assigned to the logged-on user specifically by other DPA Portal users.
  - **Completed** View: Displays all *Completed* Tasks.
- **VIEWS** node:
  - **Central Folders** ("*Group Inboxes*") are custom Views that collect Inbox Tasks assigned to a User Group (as Process Recipient) based on a set of criteria. Central Folders and the connected Rules/Conditions are managed by Ultimus Administrator.
  - **User Folders** are user-managed custom Views that organize Inbox Tasks based on user-defined Rules/Conditions. User Folders can be shared with the purpose of making the same Tasks available for another DPA Portal user. (See also: Working with User Folders and Working with Task processing user Rules and Conditions)

Further *custom* navigation items:

Specific custom content are made available by your Administrator based on attributes such as user Role(s) assigned to the logged-on user. Such custom navigation items can be either external or internal Applications, website links, processes and other items specified by your organization.

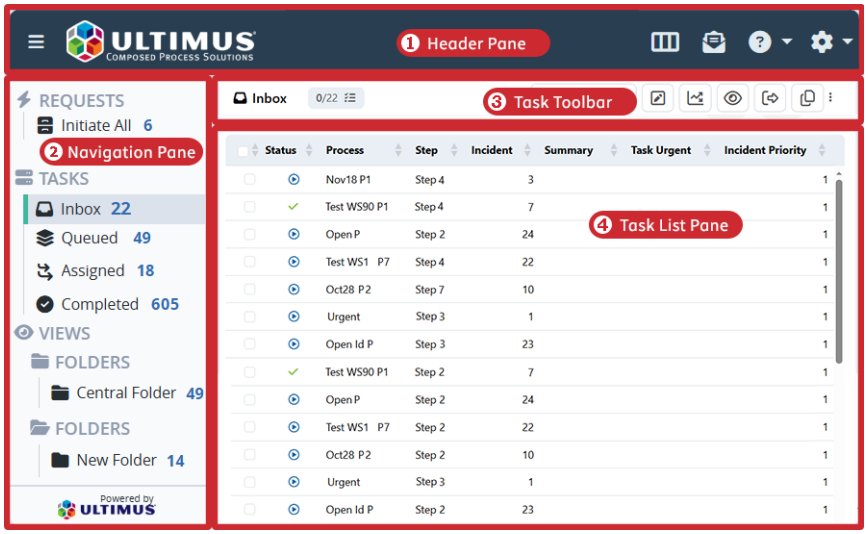
⚠ Custom navigation items are not discussed in this document.

The Ultimus DPA Portal View/Folder interface

The **View/Folder interface** consists of the **Task Toolbar** (**3**) and the **Task List Pane** (**4**).

In the Ultimus DPA Portal, **Task**s are organized into **Task Lists** which are displayed in **View**s and **Folder**s listed in the Navigation Pane.

- When the name of a View or a Folder is clicked, the Task List associated with it is shown.
- Next to the **icon** of a View/Folder, its **name** is displayed, along with the **number of items** (Tasks) in the Task List the View/Folder displays.
- To **show or hide** the **Task list** associated with a **View/Folder**, click the name of the View/Folder.



Highlights:

- **Views** and **Folders** display Tasks based on criteria of various origin: default, centrally defined, or user-defined.
- Views can be **general** ('*built-in*') or **custom**.
  See also: Differences between Views and Folders.
- The DPA Portal **Dashboard**, **Task/Forms** and **application content** occupy in the same area in which the **Task Toolbar** and the **Task List Pane** are displayed.
- To display a Task List in the **entire width** of the screen, **hide** the **Navigation Pane**.
  To **hide** or **show** the Navigation Pane, click the **3-line button** ( ) in the top-left corner.

Differences between Views and Folders

Both **Views** and **Folders** are used to organize **Tasks** into Task lists in DPA Portal, but there are differences between their nature and their usage.

For example:

- A Task can be displayed in multiple **Views/Folders** at the same time.
- **Views** only *display* Tasks, they do not *contain* them.
- **Views** can be '**built-in**' or **Custom**.
- **Folders** are custom Views, listing Tasks based on custom criteria that are defined either centrally by your Administrator (for a Central Folder), or individually by a DPA Portal user (for a User Folder).

In general, we refer to '**built-in**' Views as *Views*, to **custom** ones as *Folders*. Central Folders, which are centrally managed custom Views are referred to as Central Folders.

- You can not move Tasks to/from, or delete Tasks from a Central Folder.
- You can only copy the Tasks displayed in your Inbox View, and the target is only allowed to be one of your own User Folders.
- A Task can be only *moved* (cannot be *copied*) from one User Folder to another (both Folders must belong to the same user).

You cannot *move* a Task to a folder that that belongs to another user, but since sharing your Folders with other DPA Portal users is supported, the same Task may be visible in multiple Views/Folders at once.

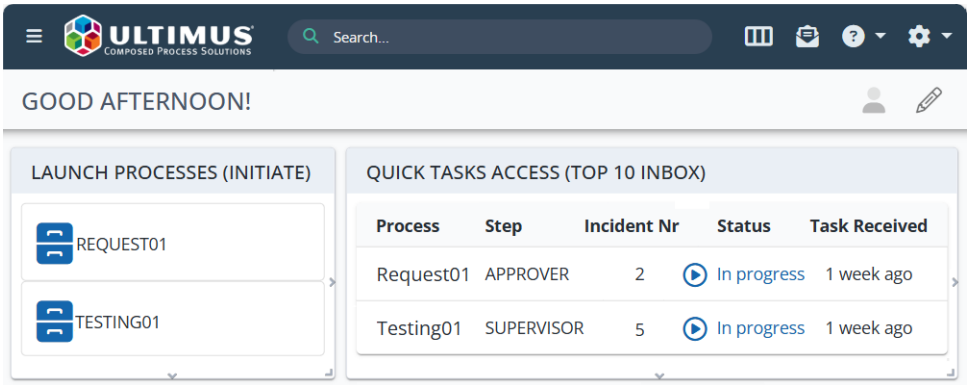
- 'Built-in' Views and Central Folders cannot be shared with another DPA Portal user.
- Users can create, rename, delete multiple user Folders, and share their own **User Folders** with another DPA Portal user.

The Ultimus DPA Portal Dashboard

Upon successful login, the DPA Portal **Dashboard** is displayed by default, provided it has been made available by your company.

The DPA Portal **Dashboard** can be configured to display a wide range of elements.

- The content as well as the arrangement of the Dashboard Panels can be configured by your organization to present **company-specific content** (e.g., external, or company-specific Portal Applications and Business Processes to Initiate) in a specific way,
- besides **DPA Portal elements** that are displayed by default (e.g., Portal Notifications, Task Lists).



The content of the Dashboard panels is **synchronized periodically** in the background. In addition, you can initiate server data synchronization manually using the **Menu** ( ) >> **Refresh** option.

The layout of the DPA Portal Dashboard is customizable: DPA Portal users can save preferences for different browser window sizes. Layout settings are saved individually for each browser window size and are automatically loaded when the browser window size is modified.

For instructions, see section Customizing the DPA Portal Dashboard.

Customizing the DPA Portal Dashboard

The **Ultimus DPA Portal Dashboard** layout can be customized within the configuration determined by your Administrator. The available elements can be hidden or shown as preferred, layout panels can be resized and rearranged, and each user is allowed store custom layouts for **three different display screen sizes**:

- **small screens** (e.g. a mobile phones),
- **medium screens** (e.g. tablets), and
- **large screens** (e.g. desktop or laptop displays, or screens larger than 1280px in width)

To customize the Dashboard layout, use the following general method:

1. **Click** the **Edit Layout** ( ) button.
2. **Edit** the layout as preferred.
   For the list of supported actions, jump to section layout panel actions.
3. **Save** ( ) the new layout.
4. Click the **Exit Layout** ( ) button.

It is not possible to configure the Dashboad to display *more* content than defined by your administrator.

Changes only customize the layout for the **current screen size**.
Saved layout settings are **applied automatically** whenever the browser **window size** changes.

Supported Dashboard layout customization

In **edit mode** ( ) the following are the supported actions for changing the Dashboard content and layout.

When finished editing, **Save** ( ) the new layout. Click **Exit Layout** ( ) tp return to the DPA Portal Dashboard.

Reposition panel



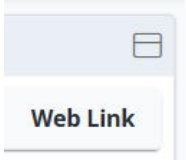
- Changes the position of a panel relative to other panels.
- Click and hold the panel title bar, drag the panel to a new position, then release the pointer.

Resize panel

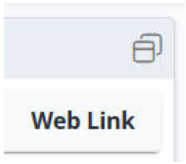


- Changes the size of a panel.
- Click and hold an arrow at the edge of the panel until you drag the edge to a new position, then release the pointer.

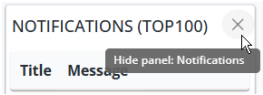
Maximize panel size (full screen width):



Minimize panel size (to the last saved width):



Hide panel



- Hides a panel from view.
- Click and hold an arrow at the edge of the panel until you drag the edge to a new position, then release the pointer.

Layout preset



- Click to switch to a layout that supports screen resolutions **larger than 1280 pixels in width**.



- Click to switch to a layout that supports resolutions between **768 - 1279 pixels in width**.

Show panel

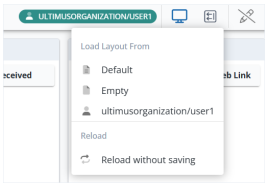


- Displays a hidden Dashboard panel. Affects **all saved** custom layouts.
  Click the **Show Panel** button and select a panel from the list.

Layout options



- Click the **Layout Options** ( ) button to see the options.
  - **Default**: Resets the Dashboard to the default layout and content configuration set by your company. Affects **all saved** custom layouts.
  - **Empty**: Empties the Dashboard screen.
  - **[organization/username]** : Your saved custom layout.
  - **Reload without saving**: Reloads the layout to the last saved layout.



Working in the Ultimus DPA Portal

This section outlines how to work in the Ultimus DPA Portal.

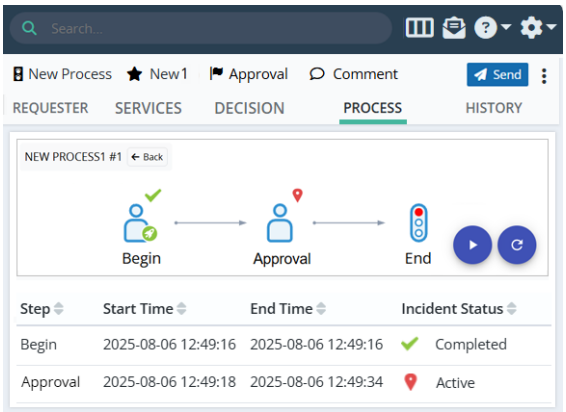
- Introduction to Processes, Incidents and Tasks
- Incident-level actions
- Task list-level (View/Folder) actions
- Working with Tasks and Forms
- Working with Workspaces

Introduction to Processes, Incidents and Tasks

The **content** and the **actions** available through the **Ultimus DPA Portal** are mainly determined by the following:

- The user **Role**(**s**), **Group**(**s**), and **Job Function**(s) the logged-on user is assigned to.
- The user **Role**(s), **Group**(s), and **Job Function**(s) the company-specific DPA Portal **Applications**, company-level **Business Processes** and **Workspace**-specific **Processes** are assigned to.

Here is an example of a company specific (simple) Business Process:



Business Processes are **company-specific** workflows that are composed using individually configurable elements that are arranged into a structure and a sequence that reflect real-life company structure, job assignments and workflows as well as the general *look&feel* design principles at the company (such as branding and naming conventions).

- When building a Business Process, the designers specify the individual Process **Steps** (user or automated) to the workflow first, then the decision points and other elements, e.g., processing/routing Rules. As they configure the behavior and the relationship between the elements, they assign Process Participants (user, user Group, Job Function, etc) as Step Recipients for each user Step and determine what should happen at decision points as well as train (configure) the automated Steps.
- Business Processes always start with a **Begin Step** and end with an **End point**.
- Between the two end-point, the configured routing mechanism carries the workflow along the **automated Steps**, **user Steps** and decision points as configured.

Process Participants (Step Recipients) are Ultimus DPA Portal users who meet Processes as **Tasks**.

- To make Tasks distinctive, some of the Process/Step attributes are displayed in DPA Portal user interface, for example Process names, Step names, Step and Task statuses.
- When a **Task** is opened in the DPA Portal, the **Form** linked to the Process when desigining the Process appears, requiring the Process Participant to provide input (text, choice, etc) to the different input fields at each Process Step and when completed, to Send/Submit the **Form**.

- **Forms** interact with the Process Participants (Step Recipients) in Ultimus DPA Portal: users must provide the required input to complete them. For example, adding text, selecting a list entry or an option, and uploading/downloading files. When all required input have been provided to the Form, the **Send**/**Submit** option becomes active.
- Upon Sending/Submitting the Task/Form, the status of the Step the Task represent changes to *Completed*, and the next Step in the workflow is activated: at **user Steps**, an incoming Task arrives to the next Recipient; at **automated Steps**, the preconfigured actions start executing in the background, without requiring human interaction until the next user Step is activated.

Process Incidents are individual instances of Processes that have been initiated from the *Initiated* view, or a sub-view of it (a Tagged View).

- To initiate a new Process Incident, the Form must receive all required input at the **Begin Step**, which enables the Send/Submit option.
- **Sending/Submitting** the Form at the Begin Step successfully creates an **Active** Process Incident that receives its own unique identifier (incident number) upon the successful Submit.
- Successfully initiating a new Process Incident triggers the next Step in the Business Process.
- When the Form in the last Step (Task) becomes *Completed*, the Process triggers the **End** point, and the **Process Incident** status is changed to **Completed**.
- **Process Incidents are tracked step-by-step**. The recorded Task data stores who and what and when happened to the Process Incident from the Begin Step to the End point.
  The recorded data is represented visually as **Process Map** when the **Incident History** function is used.

⚠ The **Process Map** is viewable for all Process Participants, but the **History Playback animation** feature is only visible for users with *Administrator* rights.

ℹ The **status** of a **Process Incident** remains *Active* unless it is stuck (*Stalled*), it is cancelled (*Aborted*) or the last automated/user Step of the Process Incident becomes *Completed*, which also changes the status of the Process Incident to *Completed*.

Business Process Steps (Tasks) have more statuses available (see section Task status indicators).

ℹ **Business Processes** can be company-level or Workspace-level.

- **Company-level** Processes are tied to the company-level hierarchy.
- **Workspace Processes** are ties to the hierarchy created for routing the Workspace Processes between members of the same Workspace.

Incident-level actions

Process Incidents are individual instances of Processes that have been initiated from the *Initiated* view, or a sub-view of it (a Tagged View).

- Sending/Submitting the Form at the Begin Step successfully creates an **Active** Process Incident that receives its own unique **identifier** (incident number) upon the successful Submit.
- When the Form in the last Step (Task) becomes *Completed*, the Process triggers the End point, and the Process Incident status is changed to **Completed**.
- The status of a Process Incident remains **Active** unless it is stuck (**Stalled**), it is cancelled (**Aborted**) or the last automated/user Step of the Process Incident becomes *Completed*, which also changes the status of the Process Incident to **Completed**.
- **Process Incidents are tracked step-by-step**. The recorded Task data stores who and what and when happened to the Process Incident from the Begin Step to the End point.
  The recorded data is represented visually as **Process Map** when the **Incident History** function is used.

The following sections outline the Incident-level actions available in Ultimus DPA Portal:

- Initiating a new Process Incident
- Aborting a Process Incident
- Viewing the status of a Process Incident
- Completing a Process Incident

For details about Business Process Incident Step/Task statuses, see section Task status indicators.

Initiating a new Process Incident

The **Initiate All** View (and its sub-views, of any) contains the Business/Workspace Process workflows you can start.

To initiate a new Process Incident, follow these steps:

1. **Double-click** (double-tap) a Process in **Initiate** View (or in a sub-category, if set).
   The Task **Form** opens and becomes editable.
2. Provide the required data.
   When finished, **Send**/**Submit** the Task.
   - Editable elements require your input.
   - Read-only fields are greyed out; you cannot add or edit their content.

When finished, **Send**/**Submit** the Task.

Sending/Submitting a Task completes the current Step and invokes the next Step of the Business Process: the Task Form closes and the Task List pane is shown, the submitted Task disappears from the list, and appears in the *Completed* View, and the recipient of the next Step receives an Inbox Task.

Without your valid and complete input the Task cannot be Sent/Submitted. Review the error messages in the DECISIONS Tab: click on an error message to jump to the element that is missing your input and complete the input.

To allow Forms to open in a new window (if not configured otherwise), you must allow pop-up windows for the web site hosting Ultimus DPA Portal. If a Task Form does not open, check if your browser is displaying a notification that it is blocking pop-up windows for the Ultimus DPA Portal web site.

At certain type of Processes, you can use a saved Form Template and edit the Form data - this does not affect the saved Form Template.

You can interrupt workflows of Process Incidents initiated by you. For instructions, see sction Aborting a Process Incident.

You may be required to interact with the Task Form elements in a different ways. For more information on the actions required from you when working on a Task, please refer to the Process Help/Step Help documentation.

Certain Form types allow Saving the Task without Sending/Submitting it when the Save (Save Form) button is clicked instead of Send/Submit (Send Form).
To continue working on the saved Task, reopen it the usual way.

Aborting a Process Incident

Aborting an Incident means interrupting the workflow associated with the Business Process, canceling the related Tasks. This action removes a Task from the following client Views: **Current**, **Overdue**, **Urgent**, and **Completed**, and halts the Process workflow.

- Aborted incidents are **tagged** to distinguish them from successfully completed Incidents.
- DPA Portal users can **Abort** Business Process Incidents *they have initiated previously*.
- The **Abort Incident** Task action is available in the **Inbox** View, the **Assigned** View, and the *User Folders* created by the logged-on user.

⚠ Once an Incident has been aborted, it cannot be re-activated.

To abort a Process Incident, follow these steps:

1. Select a Task in your **Inbox** View, **Assigned** View, or in your own User Folder.
2. Open the **3-dot menu** and select the Abort Incident option.
3. The **Abort Incident** dialog box is shown.
   Type in the reason why the Process Incident is aborted, then click **OK**.
   This text will be sent as an Notification to all Process Participants of the aborted Process Indcident.

The Tasks of the aborted Process Incident are removed from the Task list(s).



⚠ To abort a Process Incident that has been initiated by **another DPA Portal user**, please contact the application support at your organization.

ℹ Other Process Participants are only informed by **email** if this type of Notification has been **configured** previously.

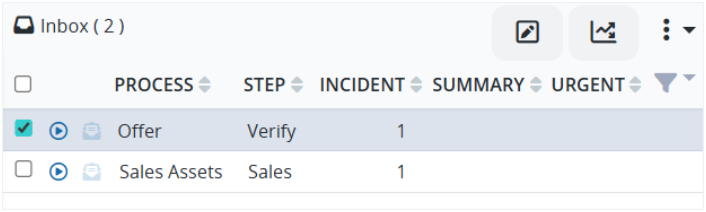
Viewing the status of a Process Incident

Process Incidents are instances of a Process workflow.

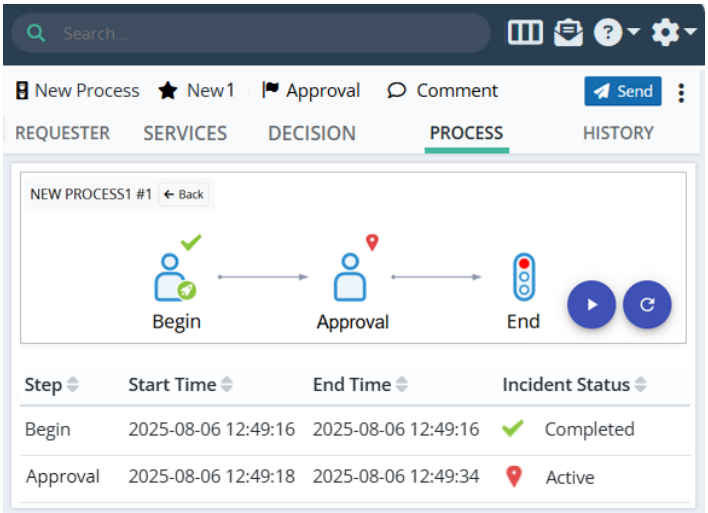
For details on how these are connected to Process Steps and Tasks, see section Introduction to Processes, Incidents and Tasks.

To check the status of a Process Incident and the associated Steps/**Tasks** and other details, do one of the following:

- **Select** a **Task** in the Task List pane with one click, then **click** the **Incident Status** button ( ) in the top-right corner to display the **Process Map**.



Double-click (tap) a **Task** to open it, and go to the **PROCESS** tab to display the **Process Map**. The following example illustrates the Process Map (History) view of a short workflow:



- **To display Step/Task status details**, move the mouse pointer over the Step in the Process Map.
- **To move the Process Map** use the *drag and drop* gesture: click the Map and hold while moving the Map to a new position, then release the pointer.
- **To change the Process Map display size**, use the *mouse wheel zoom* gesture: move the pointer over the Map, then scroll with the mouse wheel to increase or decrease the Map size.
  On touch screens, use the *pinch* gesture on the Process Map.
- To play the **animated workflow**, click the **Play** button ( ).
- **To move the Process Map** within the white area, click on the Map, hold while moving the Map to a new position, then release the pointer.

- **To close the Process Map** and return to the Task list, click the **Back** button next to the Incident Number.

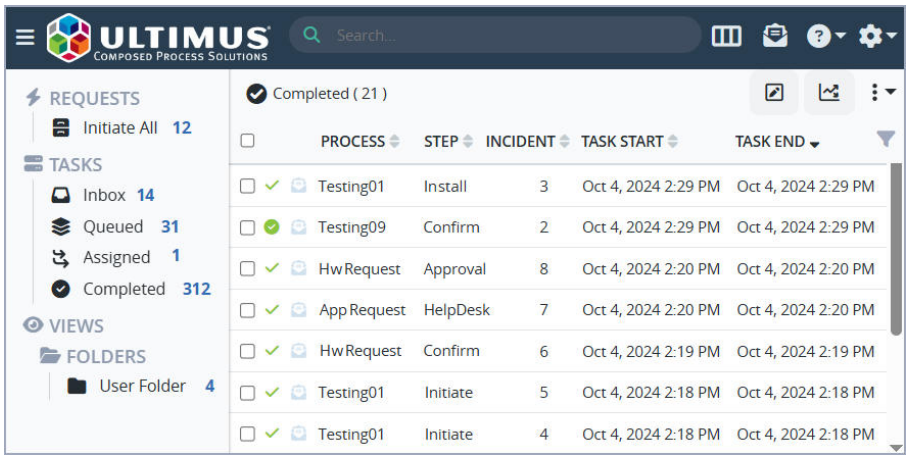
⚠ The **History Playback** feature and the enhanced **Process Map** are only visible for users with *Administrator* rights.
Should you have questions, please contact your **Ultimus Administrator**, or the application support.

Completing a Process Incident

Completing a Step/Task means successfully Sending/Submitting the Form after all required input have been added. Sending/Submitting a Task closes the Form and *Completes* the current Step of the Process. This automatically triggers (activates) the next Step, generating an *Active* Task for the next Step Recipient. The submitted Task disappears from the Task lists, and appears in the **Completed** View, and the recipient of the next Step receives an Inbox Task.

The status of an *Active* **Process Incident** is automatically set to ***Completed*** if and when **all Steps** in its workflow has been *Completed* successfully.

The **Completed** View of the Ultimus DPA Portal displays **all** *Completed* **Tasks** of the logged-on user, **regardless Process Incident status** (*Completed*, *Active* or *Stalled*) - for explanation on Task statuses, see section Task status indicators.

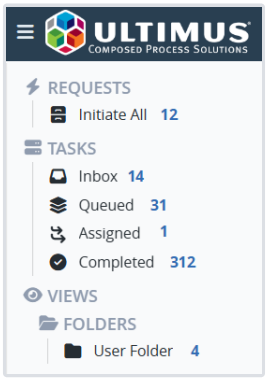


The **Process Map** and **History** can also be viewed in **Completed** View. For more on this see Viewing the status of a Process Incident.

You can interrupt Process Incidents that have been initiated by you. For instructions, see section Aborting a Process Incident.

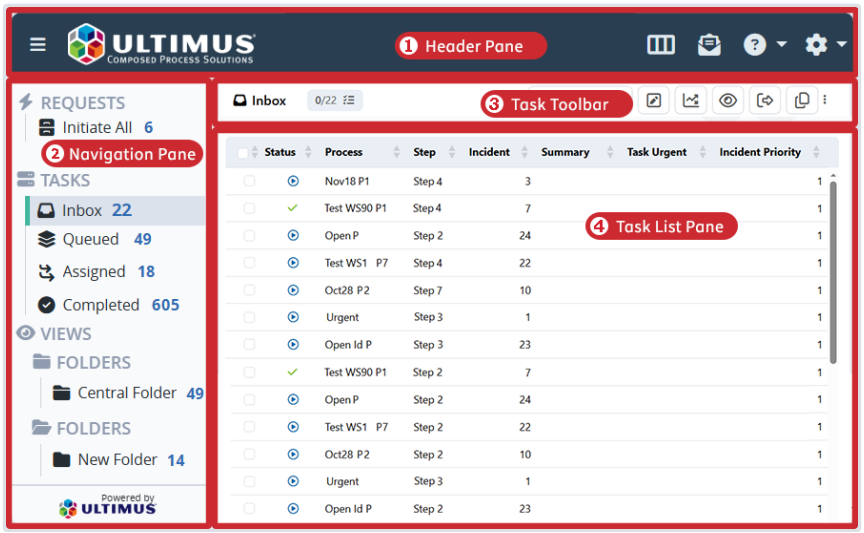
Task list-level (View/Folder) actions

Task lists are lists of Tasks organized into Views and Folders.
To display a Tasks list, click on the name of a **View** or a **Folder** in the **Navigation Pane**.



The **Task list area** consists of the following main parts:

1. The **Task Toolbar** is located above the Task List. It contains actions supported for the displayed content.
2. The **Task list Pane** displays the Tasks with attributes determined by the location (View or Folder).



- To **select** one or more **Task**(s), click the checkbox(es) next to the Task(s).
- To **open a Task**, double-click (tap) on the Task, or select the Task then click **Open Task** ( ).
- If a **Task** contains a **message**, the **envelope icon** next to the Task name changes its color from grey to blue .
  To open the message, click the envelope icon.
- To display the **Memo** and the **Attachment** columns, go to the DPA Portal main **Menu** ( ) » **Settings**, then click **Show Attachment and Memos**.

- **Task List sorting**: click the arrow(s) next to a column name to toggle between **unsorted** and the two **sorted** (or) options. To **reset** sorting, go to **Filter** ( ) » **Clear Sort**.
- To maximize the Task list area, hide the **Navigation Pane** using the **3-line** icon ( ) in the top-left corner.
  Clicking it again displays the Navigation Pane.
- To reload or **update the DPA Portal content**, click **Menu** ( ) » **Refresh**.

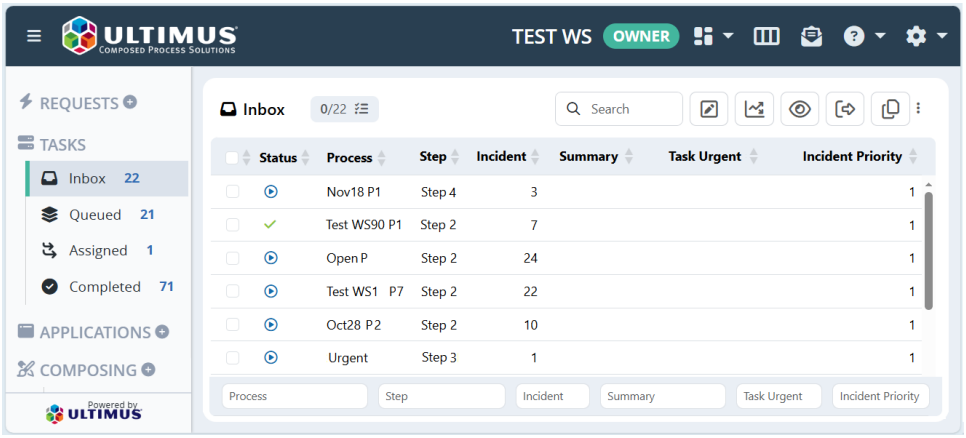
For instructions on further Task List-level actions, refer to the following sections:

- Using the Task List Filtering option
- Working with User Folders
- Exporting a Task List

Using the Task List Filtering option

To specify which tasks to display in the selected View, use the **Task Filtering** option at the bottom of the screen.

Start typing the text to search for in one of the search text boxes. The results are shown as you type.



- The entered text does not need to be a whole word.
- The filtering is **not case-sensitive**.
- If **more than one keyword** is defined in the **Process field**, the keywords will be **combined** into one. For example, defining both the keyword *Hotel* and the keyword *Car* displays all Tasks that have **both** the word Hotel and the word Car.
- If **multiple fields** contain a keyword, they are **not combined** into one: the relationship between the filter criteria is '**OR**' and **not 'AND**'.
  For example, defining both the keyword *booking* in the *Process* field and the keyword *approve* in the *Step* field displays all Tasks that belong to any Process with the word '*booking*' in the Process Name as well as all Tasks that belong to any Step that has '*approve*' in the Step Name.

The available search text fields depend on the **Task List display Template** applied to the View/Folder. For more information on Templates, see Working with Task list display templates.

Working with User Folders

Ultimus DPA Portal users are allowed to create a number of User Folders to organize their Tasks, as well as to rename, delete, share a User Folder, apply Rules or Conditions to it, move Tasks between heir User Folders, copy Tasks from the Inbox to a User Folder (this action is only allowed in this context), and customize the display Template of their User Folders.

User Folders are Views that list Tasks as defined by their creator.

This section discusses the following **User Folder actions**:

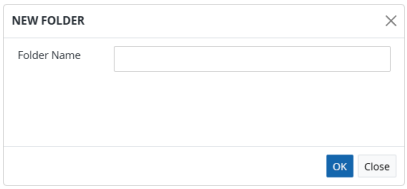
- Creating a User Folder
- Renaming a User Folder
- Deleting a User Folder

For instructions on how to work with Task lists and Tasks in User Folders, refer to the following sections:
- Working with User Folder Tasks
- Working with Task processing user Rules and Conditions

Creating a User Folder

To create a User Folder, do the following:

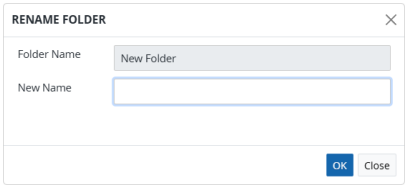
1. Select the **New Folder** option in the DPA Portal **Menu** ( ).
2. In the **New Folder** dialog box, type in a name for the new Folder.
3. Click **OK** to create the Folder.
   (To exit without creating the folder the operation, click **Close**.)



Renaming a User Folder

To rename a User Folder, do the following:

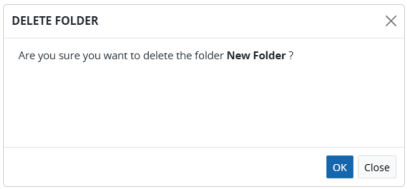
1. In the DPA Portal **Navigation Pane**, click on the name of the User Folder to rename.
2. The Task List of the selected Folder is shown.
   Select the **Rename Folder** option in the DPA Portal **Menu** ( ).
3. In the **Rename Folder** dialog box, enter a new name for the Folder, then click **OK** to save changes.
   (To abandon changes, click **Close**.)



Deleting a User Folder

To delete a **User Folder**, do the following:

1. In the DPA Portal **Navigation Pane**, click on the name of the User Folder to delete.
2. The Task List of the selected Folder is shown.
   Select the **Delete Folder** option in the DPA Portal **Menu** ( ).
3. The **Delete Folder** confirmation message is shown.
   Click **OK** to delete the selected Folder.
   (To abandon changes, click **Close**.)



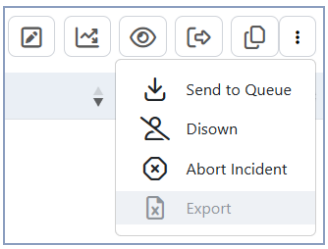
⚠ Only **empty** User Folders can be deleted. Before deleting a Task, Complete the Tasks, or *move* it to **another User Folder**.

Exporting a Task List

A Task List can be **exported** and saved as a .**CSV** file, which then may be imported into a spreadsheet application, or used as a database table.

To **export a Task list**, do the following:

1. Select the **Export Task List** option in the **3-dot menu**.



2. **Specify** a location for the new file and overwrite the file name if necessary.
3. To export and save the file, click **Save**.

Working with Tasks and Forms

Working with Tasks in the Ultimus DPA Portal means using the interface functions to manage both the incoming **Tasks** and the **Forms** associated with them.

The following sections outline the *general* Task/Form-level actions in Ultimus DPA Portal:

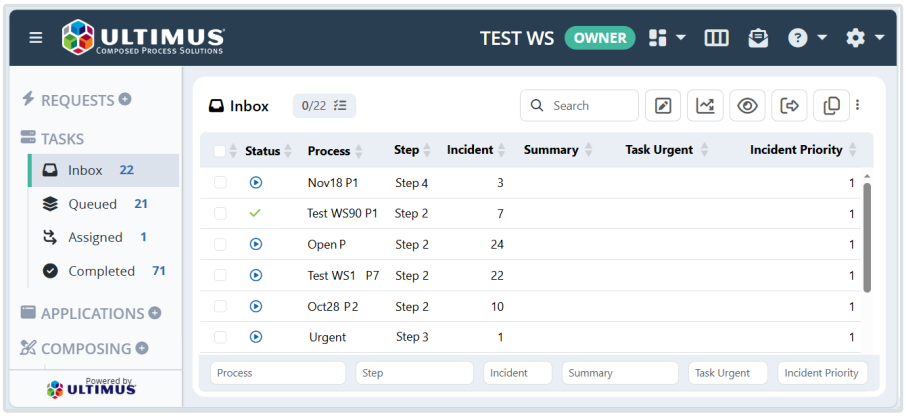
> ⚠ Processes and Forms are custom-made and represent the company-specific workflows in the Ultimus environment.
> For details on how to work with company-specific DPA Portal content, please also read the **Process/Step Help** documentation. Should you have questions, please contact your Ultimus Administrator (or the application support).

- Task status indicators
- Viewing a Task
- Completing a Task
- Picking up and returning Queued Tasks
- Assigning a Task to another DPA Portal user
- Returning a Task to the previous Process Participant
- Working with Tasks in Central Folders ("Group Inboxes")
- Working with User Folder Tasks
- Disowning a Task
- Working with Task Form Templates
- Enabling scripting in Internet Explorer
- Working with Memos
- Working with attachments
- Conferring a Task to another Process Participant
- Working with signatures
- Printing a Task Form
- Working with Task processing user Rules and Conditions

Task status indicators

Business Processes consist of **Steps** presented as **Tasks** for Step Recipients (individual users as well as user Groups) in the DPA Portal.

Task lists displayed in DPA Portal **Views** and **Folders** display a **status icon** that shows the current status of each Task.



The following tables explain the **Task status indicators** in use in Ultimus DPA Portal.

Status Codes:

1 = TASK_STATUS_ACTIVE
3 = TASK_STATUS_COMPLETED
4 = TASK_STATUS_REJECTED
7 = TASK_STATUS_ABORTED
12 = TASK_STATUS_SKIPPED
13 = TASK_STATUS_INQUEUE
18 = TASK_STATUS_DELAYED
19 = TASK_STATUS_FAILED

Colors:

- **Blue** - Active, Normal states
- **Green** - Completed, Success states
- **Orange** - Warning, Late states
- **Red** - Error, Urgent, Failed states

- **Active** Task status indicators:

Status	Substatus	Icon	Status Title
1 ACTIVE	default		**Active**
1 ACTIVE	1 LATE		**Active Late**
1 ACTIVE	2 OVERDUE		**Active Overdue**
1 ACTIVE	3 URGENT		**Active Urgent**
1 ACTIVE	4 REASSIGNED		**Active Reassigned**
1 ACTIVE	5 REASSIGNED_LATE		**Active Reassigned Late**
1 ACTIVE	6 REASSIGNED_OVERDUE		**Active Reassigned Overdue**
1 ACTIVE	8 CONFERRED		**Active Conferred**
1 ACTIVE	8 CONFERRED_LATE		**Active Conferred Late**
1 ACTIVE	10 CONFERRED_OVERDUE		**Active Conferred Overdue**
1 ACTIVE	16 RETURNED		**Active Returned**
1 ACTIVE	32 RESUBMITTED		**Active Resubmitted**

- **Completed Task** status indicators:

Status	Substatus	Icon	Status Title
1 ACTIVE	32 RESUBMITTED		**Active Resubmitted**
3 COMPLETED	default		**Completed**
3 COMPLETED	2 FAILED		**Completed Failed**
3 COMPLETED	1 RETURNED		**Completed Returned**
3 COMPLETED	12 INCIDENT_ACTIVE		**Completed Incident Active**
3 COMPLETED	4 INCIDENT_COMPLETE		**Completed Incident Complete**

- **Other** Task status indicators:

Status	Substatus	Icon	Status Title
7 ABORTED	-		**Aborted**
19 FAILED	-		**Failed**
18 DELAYED	-		**Delayed**
4 REJECTED	-		**Rejected**
12 SKIPPED	-		**Skipped**
13 INQUEUE	-		**In Queue**
initiate VIEW	default		**Initiate**
initiate VIEW	template		**Form Template** (sys_task_summary not empty)
initiate VIEW	2 DISABLED		**Initiate Not Available**
unknown	-		**Unknown** (fallback for unrecognized status)

Viewing a Task

Opening a Task for viewing displays it without reserving it for editing. The content of the Task (Task Form) is displayed as **non-editable**.

To view a Task, select a Task from the list, then click the **View** button in the menu bar.

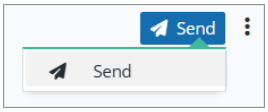
Tasks listed in **shared User Folders** or **Central Folders** can be checked out and edited by only one Process Participant, but the same Task can be opened for viewing by any number of Process Participants at the same time, even if it is checked out for editing. **Viewing** a Task displays the content of the Task (Task Form) as **non-editable** content.

Completing a Task

Ultimus DPA Portal users meet Business Processes and its Steps as **Tasks** and **Forms**: when a Task is opened, the Form linked to the Process is displayed.

At each of Step of a Process, Task **Forms** display elements which require user input. For example, Process Recipients must add text, select an item from a list, or upload/download files.

When all required input have been provided to the Form, the **Send** (Submit) option becomes active.

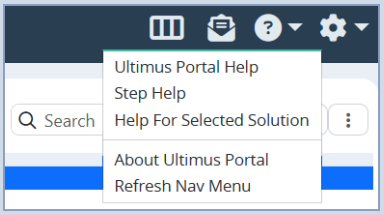


To complete a Task, do the following:

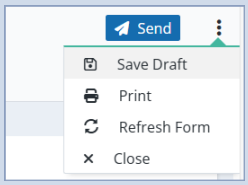
1. **Open** the Task for editing: **double-click** (double-tap) the Task.
   The Task **Form** becomes editable.
2. **Provide the required input**.
   - *Read-only* elements are greyed out; you cannot add or edit their content. These elements are active at other Steps of the Process.
   - Editable elements require your optional or mandatory, but **valid** and **complete input**.
   - Mandatory elements that require your input are marked with red.
   - The Task cannot be Sent/Submitted, unless all mandatory elements have been provided valid and complete input.
   - To review the error messages ('violations'), click the **Send** button, then select **Review Violations** to jump to the **DECISIONS** Tab.
   - Click on an error message to jump to the Form element that requires input, then provide a complete and valid input.
3. When finished, **Send** (Submit) the Task.

When Task (Form) is successfully **Sent (**Submitted), the status of the Step the Task represents changes to *Completed*, and the next Step in the workflow is activated.

Company-specific solutions, contents and custom interface elements are not discussed in this document. For instructions on how to work with company-specific **Applications**, **Solutions**, **Processes** and **Steps/Tasks** refer to the specific **Help** documentation available through the DPA Portal **Menu** .



Certain Form types allow Saving the Task Form without Sending/Submitting.



- When the **Save Draft** button is clicked instead of Send/Submit (Send Form), the input is saved and the Form is closed. This does not *Complete* the Task.
- To continue working on the saved Task Form, open the Task.

If a Task Form does not open, check if your browser is displaying a notification that it is blocking pop-up windows for the Ultimus DPA Portal web site. To allow Forms to open in a new window (if not configured otherwise), you must allow pop-up windows for the web site hosting Ultimus DPA Portal.

Picking up and returning Queued Tasks

Tasks displayed in the **Queue** View are visible only for the members of predefined Process Recipient Groups, or *queues*.

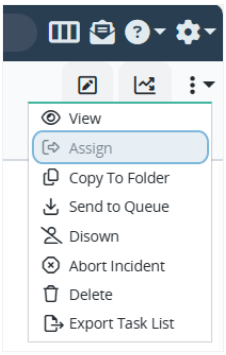
- Assigning a Task to yourself from the Queue View
- Returning a Task to Queue View

Assigning a Task to yourself from the Queue View

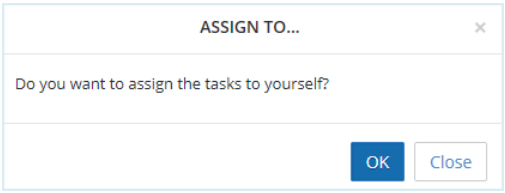
Tasks assigned to you are listed in your **Inbox** View instead of the **Queue** View.

To 'pick up' a Task from the Queue, assign it to yourself as follows:

1. Open the **Queue** View and select a Task to assign to yourself.
2. Select **Assign** from the **3-dot menu** to display the **Assign to**... dialog box.



3. Click on **OK** to assign the Task to yourself.
   (Click on **Close** to cancel the operation.)



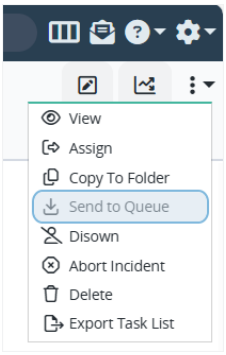
Returning a Task to Queue View

- Tasks returned to the Queue are no longer assigned to you: they disappear from your Inbox View and appear in **Queued** View.

- This operation also removes the **Returned** Tasks from the User Folders in which it used to be listed when it was assigned to you.

To return a Task to the Queue, do the following:

1. **Open** your **Inbox** View and **select** a Task.
2. Select the **Send to Queue** option in the **3-dot menu**.



Assigning a Task to another DPA Portal user

You can assign one or more Tasks to another DPA Portal user from the following DPA Portal locations:

- your **Inbox** View,
- the **Queued** View,
- from the **User Folders** created by you.

The Tasks assigned this way appears in the **Assigned** View, along with the name of the DPA Portal user the Task is assigned to, and the *original* due date of the Task.

To assign a Task to another DPA Portal user, follow these steps:

1. **Select** a Task, then select the **Assign** button in the menu bar.

2. In the **Assign To**...dialog box, provide at least 3 characters to search for.
3. Select a **DPA Portal user** from the **drop-down** list then click **OK** to assign the Task to the selected user. (Click **Close** to cancel the operation.)



This feature may be restricted, or may require approval.

For information on how to assign your future incoming Task to another DPA Portal user(s), see section Working with Task processing user Rules and Conditions.

Task assigned this way can be reassigned to you. To **take back a Task**, open the **Assigned** View, select the Task and click on **Take Back Task** ( ).

Returning a Task to the previous Process Participant

⚠ This section is applicable to:
- ...those Form types that allow returning a Task using this specific method.
- ...returning a Task to its original owher if the Task was shared with you for consultation using the **Conferred to** function.

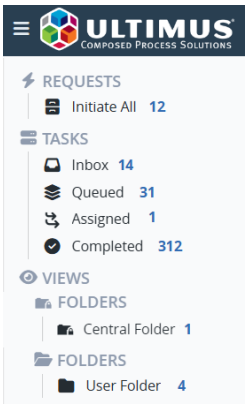
To return a Task to the previous Process Participant, or the original owner, do the following:

1. **Check out** the Task which is to be returned.
2. Click **Return Form**.

Working with Tasks in Central Folders ("Group Inboxes")

Central Folders (CFs, or "Group Inboxes") are *centrally-managed custom Views* that serve as an Inbox View for the specified user Group.

When a Process Step has been successfully executed, the next Step is activated. If the newly activated Step is a user Step and its Recipient is a Group, then a new Task arrives to the Central Folder associated to that Group.
You can find Central Folders (Group Inboxes) under the **VIEW**s node in the **DPA Portal Navigation Pane**.



- Central Folder **Tasks are visible only for the members** of the associated user Group (as Process Recipient).
- Tasks listed in a shared User Folder or a Central Folder can be **edited by only one Process Participant at a time**. However, the same Task can still be viewed by other Process Participants simultaneously, even if it is currently being edited.
- Tasks displayed in a **Central Folder** are also displayed in the **Inbox** of the Task owner: When a Task in your Queued View is opened for editing, it is assigned to you automatically, meaning that the Task appears in your Inbox View. In addition, for you the Task appears in those Central Folders of those user Groups of which you are a member.
- You can work with Central Folder Tasks the same way as with any other Task, with one exception: user-defined Rules/Conditions do not overwrite the Central Folder Rules/Conditions.
- DPA Portal users cannot copy CF Tasks to a user Folder, move Task to/from a Central Folder, or delete CF Tasks.
- Central Folders apply their own custom Task List display templates automatically (see template names starting with *CF_*).
- Central Folders (Group Inboxes) are created and managed by your **Ultimus Administrator**.
- This also includes the **Rules/Conditions** for collecting and displaying Tasks:
  - Rules and Conditions defined by the user (including Future Task Management) cannot overwrite CF Rules and Conditions.
  - *CF Rules* and Conditions are applied to incloming Tasks prior to executing user-defined Rules/ Conditions.
  - *CF Rules* are marked with *[Admin]* in the list of Rules.

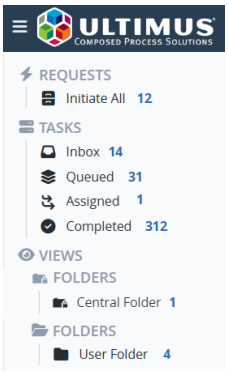
To work on a Task listed in a Central Folder (Group Inbox), do the following:

1. **Open the Task** for editing by double-clicking (double tapping) the Task.
   The Task gets automatically assigned to you, making you the owner of the Task, but it is also displayed in the Group Inbox until it is *Completed* (Sent/Submitted successfully).
2. **Complete the Task** (as described in section Completing a Task).
3. **Send** (Submit) **the Task**.

Working with User Folder Tasks

User Folders are custom Views that organize Inbox View Tasks based on the Rules and Conditions set by the DPA Portal user.

Expand the **FOLDERS** node in the Navigation Pane to display a list of User Folders.



- Copying a Task to a User Folder
- Deleting a Task from a User Folder

> See also: Working with User Folders

Copying a Task to a User Folder

The **Copy to Folder** action allows the selected **Inbox** Task to be also displayed in the specified User Folder you created.

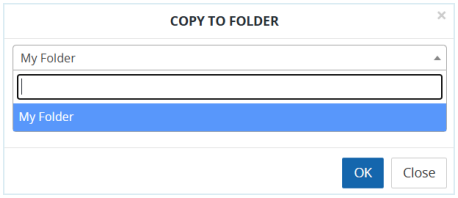
- Copying a Task does not *move* the Task; The Task remains listed in the original View as well.
- Tasks assigned to you appear in *built-in* Views and Custom Views (Central Folder and Tagged Views) as well as in the User Folder it was copied to.

> The availability of this operation depend on the original location of the Task.

To copy a Task to one of your own User Folders, do the following:

1. **Select** a Task to copy, then click the **Copy to Folder** button in the menu bar.

2. **Select** the User Folder to which to copy the Task(s), then click **OK**.
   To cancel the action, click **Close**.



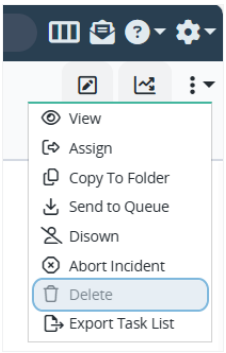
Deleting a Task from a User Folder

This option removes Tasks from a **User Folder**.

> ⚠ This option only removes Tasks from a **User Folder**. To remove Tasks from any location, either complete the Task, or use the Task operations available in the **3-dot menu** of that View/Folder.

To delete a Task from the Task List of a User Folder, do the following:

1. In one of your **User Folders**, **select** the Task to be removed from the list.
2. Select the **Delete Task** option in the **3-dot menu**.



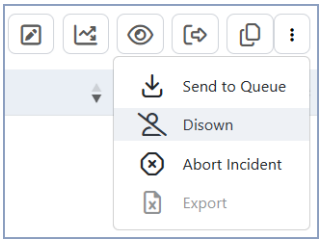
3. A pop-up message appears asking you to confirm your choice.
   Click **OK** to confirm, or **Cancel** to interrupt the action.

Disowning a Task

Disowning a Task means returning the Task from your **Inbox** View to the **Ultimus BPM Server**.

To disown a Task, follow these steps:

1. Select the Task to be disowned and click the **Disown** option in the **3-dot menu**.



2. A **pop-up message** appears, asking you to **confirm** your choice.
   Click **OK** to confirm and send back the Task to the BPM Server.
   (To cancel the operation, click **Cancel**.)

Working with Task Form Templates

⚠ This option is only available for certain Form types. Other Form types may require you to work with Form Templates using a different method.

Form Templates save you time when initiating a Process Incident: the saved custom Form Templates can be used to fill in Form data automatically from the Template when initiating a Process Incident that the Template is based on.

- Creating a Form Template
- Deleting a Form Template

Creating a Form Template

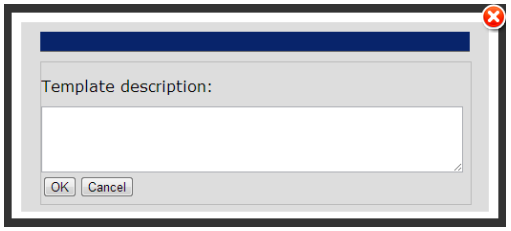
To create a Form Template, initiate a new Process Incident, and save the Template before submitting the Form as follows:

1. Click **Save Template**.
2. In the **Save Template** dialog box, enter a description that will be displayed in the Summary column in Initiate View (or its sub-views).

ℹ Templates associated with the same Business Process can be easily distinguished if their descriptions are clear.

3. Click **OK** to save the new Form Template.

   The new Template is displayed in the Business Process list. Click **Menu** (⚙) » **Refresh** to reload the list.



ℹ For instruction on initiating a Process Incident using Form Template, see Initiating a new Process Incident.

Deleting a Form Template

To permanently delete the selected Form Template, select the Form Template to delete, then click **Delete Process Template** (🗑).

Enabling scripting in Internet Explorer

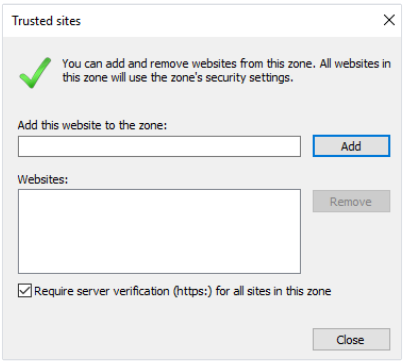
⚠ This content only applies for opening **Ultimus** (standard) **Forms** and **Ultimus Web Forms** using Internet Explorer. This means using the Compatibility mode to display the content of Ultimus DPA Portal.

ℹ We recommend that you use **Microsoft Edge** instead of Internet Explorer.

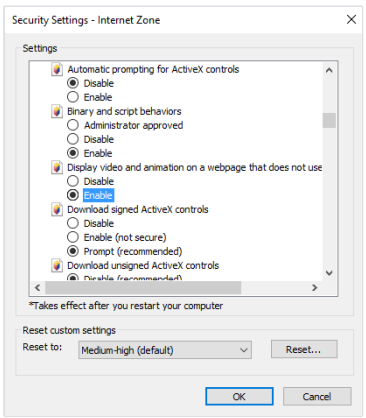
Scripting must be **enabled** in Internet Explorer for the Ultimus DPA Portal to display content correctly.

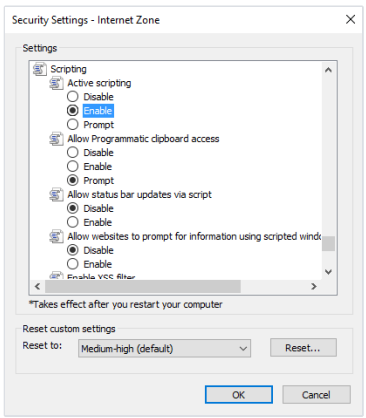
Open **Internet Explorer** >> **Tools** menu >> **Internet Options** >> **Security** tab, and do one of the following:

- Select **Trusted sites**, then click **Sites** to display the **Trusted sites** dialog box.
  Enter the Ultimus DPA Portal **URL** in the text box, and click **Add**. Click **Close** to exit.



- Select **Internet** and click **Custom level** to display the **Security settings - Internet Zone** dialog box. Set **all** of the following settings to ***Enabled***, then click **Apply**. When finished, click **OK** to exit.
  - *Binary and script behaviors*
  - *Display video and animation on web page that does not use external media player*
  - Scripting >> *Active scripting*





The classic menu is hidden by default. To unhide it, press the **ALT** key on the keyboard.

Working with Memos

⚠ The **Memo** option is only available for certain Form types. Other Form types may require different methods for commenting.
For Process/Step-specific instructions, refer to the Process/Step Help documentation. Should you have questions, please contact your Ultimus Administrator.

Depending on Form type, Process Participants can add memos as comments on the Tasks they work on. Once added, memos are carried over to the subsequent steps in the Process Incident.

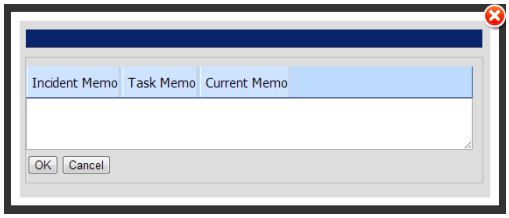
- **Incident memo**s that are added on **Process Incident level** to the Processes you can initiate.
- **Task memo**s that are added on **Task level at Process Steps/Tasks** by DPA Portal users (Process Participants).

For instructions on how to work with Memos, refer to the following sections:

- Adding a Task memo
- Viewing memos
- **Deleting memos**: It is not possible to **edit**, or permanently **delete** a memo in the Ultimus DPA Portal.

Adding a Task memo

1. Open the Task in which to enter a new memo.
2. Click the **View Memos** button to display the **Memos** dialog box.
3. Click on **Current Memo** to display the memo text box.
   Enter your comment, then click **OK** to save the new memo.



When the Task is opened again, the **View Memos** button ( ) next to the **Check Out** button is blinking, designating that a new Memo has been added since you last opened the Task.

⚠ When creating a memo, consider that once saved, it is not possible to **edit**, or permanently **delete** a memo.

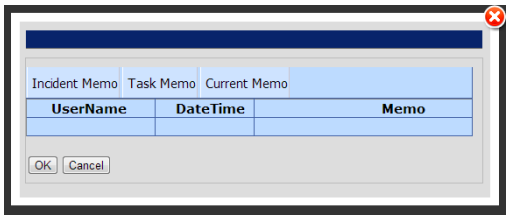
Viewing memos

To view the memos added on Incident-level or on Task-level, do the following:

1. **Open** a **Task** that has Memos.

   If the **View Memos** button ( ) is blinking (next to the Check Out button), a new Task memo has been added since you last opened the Task.

2. Click the **View Memos** ( ) button to display the **Memos** dialog box.
   The list of **Incident memos** is displayed by default, displaying the following columns:
   - **UserName**: The username of the Process Participant who entered a memo.
   - **DateTime**: The time the memo was saved.
   - **StepName**: The name of the step in the Business Process in which the Process Participant entered a memo.
   - **Memo**: The content of the memo.
3. To view **Task memos**, click on **Task Memo** to display the list of memos added to the individual Process Steps/Tasks.
   The **Task Memo** table displays the following columns:
   - **UserName**: the username of the Process Participant who entered a memo.
   - **DateTime**: the time the memo was saved.
   - **Memo**: the contents of the memo.



Working with attachments

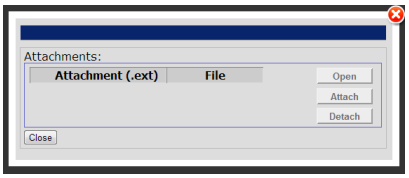
- Adding attachments
- Viewing or downloading an attachment
- Detaching a file

⚠ Different Task Form types require various methods for uploading attachments. This section outlines the two general methods referred as **option a)** and **option b)** for each of the file actions.

For Process/Step-specific instructions, refer to the **Process/Step Help** documentation. Should you have questions, please contact the **Ultimus Administrator** in your organization.

Adding attachments

1. **Open a Task** for editing by checking out the Task.
2. Click the **Attachments** button to display the **Attachments** dialog box.
3. Click **Attach**, then locate, then select, and upload the file to attach.
   When finished, click **Close** to exit the **Attachments** dialog box.

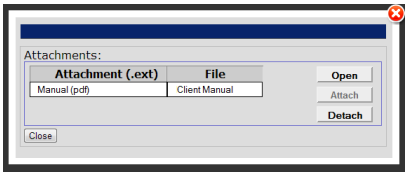


The selected file(s) are shown in the attachments list.

⚠ File names containing any of the following characters cannot be uploaded:
, \ / : * ? " < > | # { } % ~ or **&**.

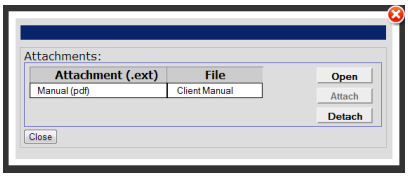
Viewing or downloading an attachment

1. **Open a Task** for editing by checking out the Task.
2. Click the **Attachments** button to display the **Attachments** dialog box.
3. In the list of attached files, select an attachment to view or download.
4. To **open** an attachment with the default installed application, click Open.
   To **download** the attachment, use the options available in the application where the attachment is open.
   When finished, click **Close** to exit the **Attachments** dialog box.



Detaching a file

1. To **open a Task** for editing, check out the Task.
2. Click the **Attachments** button to display the **Attachments** dialog box.
3. **Select** an attachment from the list of attached files and click **Detach** to remove it. When finished, click **Close** to exit the **Attachments** dialog box.



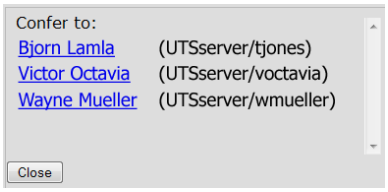
Conferring a Task to another Process Participant

⚠ This section is only applicable to **Ultimus Forms** and **Ultimus Web Forms**.

The *Conferred* Task disappears from your Inbox View, and appears in the Inbox View of the Process Participant it has been shared with.

To confer a Task, do the following:

1. **Check out** the Task which is to be conferred to another Process Participant.
2. Click the **Confer** button to display the **Confer To** dialog box.
3. Select the Process Participant to whom the Task should be conferred.
   Click **Close** to confer the Task.



Working with signatures

Process Participants (Step Recipients) can place their **digital signature** into the **Signature** field of Forms to verify their identity for other Process Participants. The digital signature is displayed with a signed background.
If a a Task Form requires the logged-on user to sign, the Form cannot be Sent/Submitted and a message is displayed about the requirement.

For instructions on how to work with signatures, refer to the following sections:

- Signing a Task Form
- Removing your signature from a Task Form

> ⚠ This section is only applicable to those types of Forms that allow working with signatures in this specific way. Other Form types may require you to work with signatures using a different method.
> For Process/Step-specific instructions, refer to the **Process/Step Help** documentation. Should you have questions, please contact the **Ultimus Administrator** in your organization.

Signing a Task Form

1. **Open a Task** for editing by checking out the Task.
2. In the **Password** text box, enter your Ultimus account password.
3. Click **OK** to place your digital signature in the signature field.

Removing your signature from a Task Form

1. **Check out** a Task and double-click the Signature field.
   The **Process Participant name validation** dialog box appears.
2. Select **Remove Signature**, and Click **OK**.

Printing a Task Form

To print a Form, open, or check out the selected Task and click **Print**, and specify printing parameters as usual.

> ⚠ This option is only supported for certain Form types. Other Form types may require a different method. For Process/Step-specific instructions, refer to the Process/Step Help documentation. Should you have questions, please contact your Ultimus Administrator.

Working with Task processing user Rules and Conditions

Ultimus DPA Portal users can set up **user Rules and Conditions** to organize their incoming Tasks between two specific dates. User Rules are executed on all incoming Tasks that match the parameters determined by the Rule and its associated Conditions:

- **Assign to User** Rules assign Tasks to the specified DPA Portal user.
- **Copy to Folder** Rules copy Tasks to the specified User Folder.

Processing priority

Ultimus DPA Portal Rules are processed and applied to the incoming Tasks in the following general order of priority:

1. The first Rules that run on an incoming Tasks are the **Central Folder Rules** (CF Rules).
   User Rules do not override, or take a higher priority than CF Rules (regardless their position in the list of Rules)
   CF Rules:
   - …are listed with [Admin]… or with [A]… in the Rules segment.
   - …are managed centrally by your Administrator.
   - …have the function to determine which incoming Tasks to display in a specific Central Folder ('*group Inbox*').
   - …cannot be accessed by DPA Portal users.
2. The next that are run are the **Assign to User** type of user Rules.
3. The **Copy to Folder** type of user Rules are run only after.

The following sections explain how to work with Task processing Rules and Conditions:

- Creating or modifying a user Rule
- Adding or modifiying Conditions of a user Rule
- Changing the processing order of user Rules or their Conditions
- Deleting a user Rule or a user Rule Condition

Creating or modifying a user Rule

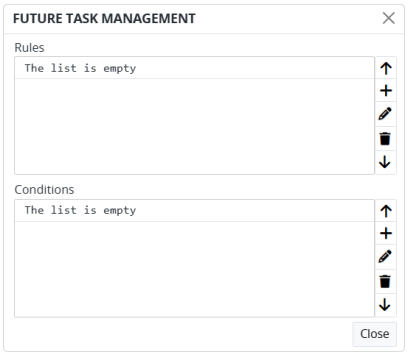
DPA Portal users are allowed to create the following two types of user Rules:

- **Assign to User** Rules assign Tasks to the specified DPA Portal user.
  The Tasks to which the defined Rule Conditions apply will be listed in the **Assigned** View of the selected DPA Portal user between the specified dates.
- **Copy to Folder** Rules copy Tasks to one of your (existing) User Folders.
  The Tasks to which the defined Rule Conditions apply will be listed in the selected Folder between the specified dates, as well as in your Inbox View.

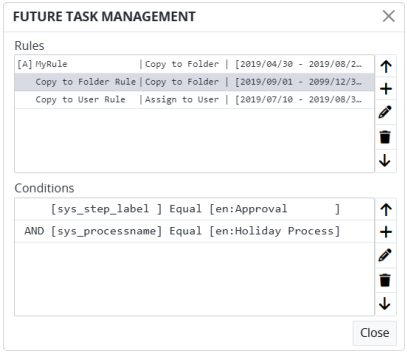
> ⚠ Rules that are listed starting with [Admin]… or with [A]… apply only to a specific Central Folder ('Group Inbox View') and are managed by your Administrator.
> CF Rules are executed before any other Rule types and cannot be overwritten by user Rules.

To create or modify a user Rule, do the following:

1. Select Menu ( ) » **Future Task Management**.
2. The **Future Task Management dialog box** is shown.
   Do one of the following:
   1. **To create a new Rule**, click the + next to the **Rules** segment.



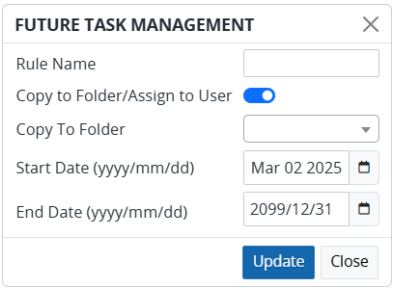
   b. **To modify a Rule**, **select** the Rule to edit and click the ✎ next to the Rules segment.



3. **Specify** (or edit) the following:
   - **Rule Name**: Type in a name for the Rule.

- **Copy to Folder**/**Assign to User**: Click the toggle to select the **Rule type**.
- **To User** or **Copy to Folder**: Depending on the selected Rule type, specify either the **DPA Portal user** to whom to assign the Tasks, or **select one of your user Folders** into which to copy the Tasks when the Rule is processed.
- **Start Date** and **End Date**: Click into a date field to display a calendar, then select a date to be the **first** and the **last day** for the Rule will be processed on incoming Tasks.
  The default values are the current date (as Start Date) and a date in the far future (as End Date).

4. Click **Update** to save the Rule.
   Click **Cancel** to exit without saving.



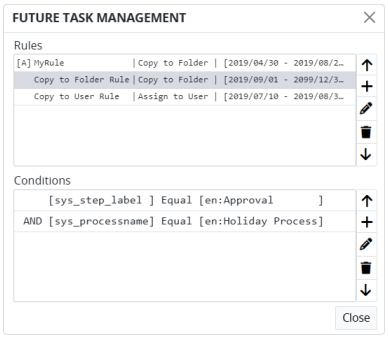
New Rules must be assigned Condition(s). For instructions on how to add a new Condition to an existing Rule, refer to section Creating a new user Rule Condition.

Adding or modifiying Conditions of a user Rule

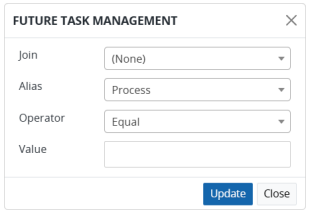
> ⚠ Rules that begin with [Admin]… or with [A]… are managed by your Administrator.
> User Rules and their Conditions cannot override them, or take a higher processing priority.

To specify a new Condition for a user Rule, do the following:

1. Click **Menu** (⚙) » **Future Task Management**.
   The **Future Task Management dialog box** is shown.
2. **Select a Rule** from the list in the **Rules** segment.
   - When a Rule is selected, the **Conditions** segment is populated with the list of Conditions defined for that Rule.
   - If there has not been any Conditions defined yet, the Condition segment is empty.



4. Click the ➕ located next to the **Conditions** segment to open the **Conditions** dialog box.
5. **Specify** the following:
   - **Join**: Specifies the connection between this and other Condition(s) assigned to the same Rule:
     - **None**: This is the only Condition defined for the selected Rule.
     - **And**: The Rule will be applied if this Condition is true at the same time (as one or more of) the other Condition(s) assigned to the same Rule.
     - **Or**: The Rule will be applied if this Condition alone, OR other existing Condition(s) are true at the same time.
   - **Alias**: The drop-down contains a list of column names displayed in your Inbox View.
     Select one that determines if the selected Rule will be applied to a Task.
   - **Operator**: Determines the logical operator for the comparison between the selected column name (Alias) and the content of the Value field (free text).
     Select one of the logical operators displayed in the drop-down list: *Equal*, *NotEqual*, *LowerThan*, *GreaterThan*, *LowerOrEqualThan*, *GreaterOrEqualThan*, *Contain*, *DoNotContain*.
   - **Value**: Type in a value to compare to the column (Alias) name.



4. When finished, click **Update** to save the Condition.
   (Click **Close** to exit without saving.)

Changing the processing order of user Rules or their Conditions

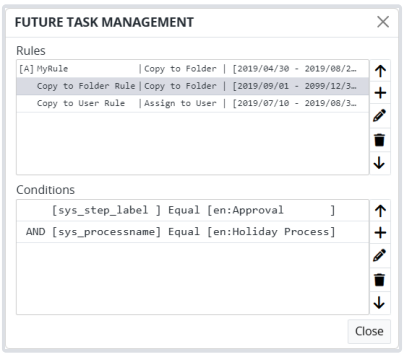
The order in which user **Rules** or their assigned **Conditions** are listed in the Future Task Management dialog box, **determines the processing order** of Rules of the same type and the Conditions assigned to the same Rule.

- **Central Folder** Rules and their Conditions are applied before user-defined Rules.
- The **Assign to User** type of user Rules are the next to run.
- Finally, the **Copy to Folder** user Rules are processed.

Only the Rule with the highest position in the Rules list will be applied to a Task and processed.
Rules that occupy a lower position in the list will not be applied.

To change the order of user Rules and user Rule Conditions, do the following:

1. Select **Menu** ( ) » **Future Task Management**.
   The **Future Task Management dialog box** is shown.



2. **Use the** ↑ and ↓ **arrows next to the segments** to reorder the lists:
   1. The **list of Rules** is displayed in the **Rules** segment.
      Select a Rule and use the arrows to change its position.
   2. **Select a Rule** to display its Condition(s) in the **Conditions** segment.
      Select a Condition and use the arrows to change its position.
3. Click **Update** to save the new Rule.
   Click **Cancel** to exit without saving the changes.

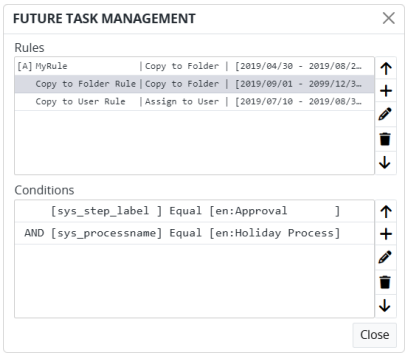
To ensure there is no **conflict** in Rule execution, place the **Assign to User** type of Rules higher in the list than to the **Copy to Folder** type of Rules.

Deleting a user Rule or a user Rule Condition

Rules that are listed starting with [Admin]… or with [A]… are managed by your Administrator and cannor be deleted by DPA Portal users.

To delete a user Rule or a user Rule Condition, do the following:

1. Select Menu ( ) » **Future Task Management**.
   The **Future Task Management dialog box** is shown.
2. **Select** a Rule to work with.
3. Do one of the following:
   1. **To delete the selected Rule**, click the next to the **Rules segment**.



b. **To delete a Condition**, select a Condition and click the next to the **Conditions segment**.

3. Click **Close** to close the **Future Task Management** dialog box.

Working with Workspaces

DPA Portal **Workspaces** are invitation-based collaborative environments that are isolated from one another. **Workspace Participants** (Owners, Administrators, Composers and Process Participants) are allowed to create, manage and to work with Workspace-specific Processes, Incidents and Tasks according to their assigned Workspace Roles and actions.

This section discusses the following **Workspace-related** actions:

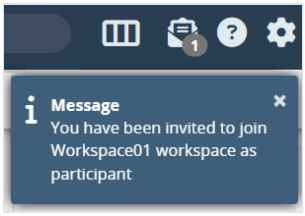
- Working with Workspace Invitations
- Creating a Workspace
- Approving a Workspace

⚠ This section only applies if the **Workspaces** feature is active in your Ultimus environment.

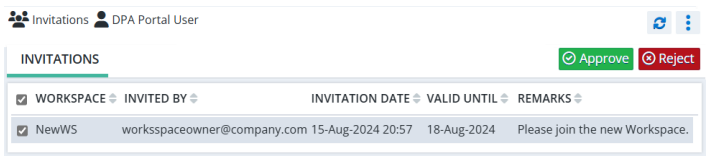
Working with Workspace Invitations

After creating a new Workspace, **Workspace Owners** can select other DPA Portal users to be Workspace Participants. The invitation step is not mandatory: WS Owners can either send Invitations to other DPA Portal users by **email**, or add them **manually** to the list of Workspace Participants without sending an Invitation.

- **If you have been added to a Workspace manually**, a **DPA Portal Notification** informs you instead of an email.
  There are no additional actions required; Participants added this way may start working in the Workspace immediatelly, according to the **Workspace Role(s)** assigned to them by the WS Owner.



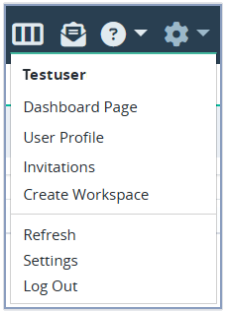
- **If you have been invited to join a Workspace by email**, you will receive an email Invite in addition to the DPA Portal Notification.
  Please respond and **Accept** or **Reject** the Invitation using the options provided in the email.
  - The default **deadline** for responding to an email invite is within **3 days**.
    This deadline **may be different** at your company.
  - Should you **miss the deadline** to Accept or Reject an Invitation, the WS Owner may send you a new email invite as they can track the statuses of the Invitation they send.
    If you are **supposed to receive** an invite but it has not arrived, **please inform the WS Owner**. so they can resend it or add you to the Workspace Participant list manually.
- **Invitations** you have not responded yet are listed in DPA Portal **Menu** ( ) >> **Invitations**.
  Instead of the options in the email invite, you can use the **Approve** ot the **Reject** button to respond to the Invitation.



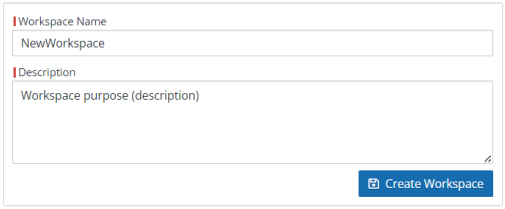
Creating a Workspace

To create a Workspace, do the following:

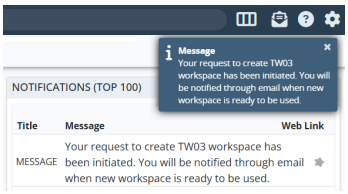
1. Select the **Create Workspace** option in the DPA Portal **Settings** menu ( ).



2. **Specify** the following:
   - **Name**: Specify a Workspace name according to the naming conventions at your company.
   - **Description**: Type in a short description of the Workspace.



3. Click **Create Workspace** to complete the request.
   A Portal Notification (confirmation) message is shown, informing you about the next steps.



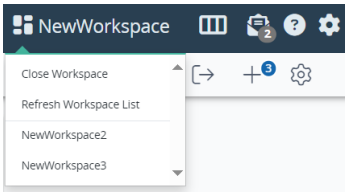
Once the new Workspace is ready to be used, a Portal **Notification** appears and a confirmation **email** is sent.

- If this is the **first WS** you have created, the WS is automatically opened.
  - The **name** of the WS is visible in the **top bar**.
  - The **Navigation Pane** displays the **name** of the WS and the WS-specific **applications** available to the logged-on user based on their assigned Role(s) in that WS.

For more tips, visit section Where can I find my Workspaces?

Depending on the company-level settings, the **new Workspace may require manual approval** before it can be displayed in the DPA Portal.

- If this is **not the first** WS you created, the name of the new WS appears in the **Workspace List** . Click a WS name to open the WS.



If the **Navigation Pane** does not show the open Workspace, try refreshing the application data using the **Settings** >> **Refresh** option.

If the new Workspace is still not shown latest a few hours after receiving the *success* Notifications (email, Portal), contact your DPA Portal Administrator or your Ultimus Administrator.

Workspace creators are **automatically** added to the following **roles**: *Workspace Owner*, Workspace *Organization Charts administrator*, Workspace *Process Administrator*, and Workspace Process *Composer I*.

Approving a Workspace

Depending on company-specific settings, **new Workspaces may require manual approval** before they can be used.

If your approval is required for a new Workspace, a new **Task** arrives to your DPA Portal **Inbox View**: the **Manual Approval** Step of the **Creating New Workspace** Process.
To **Approve** or **Reject** the creation of the new Workspace, open the Task for editing and provide an input accordingly, then **Send/Submit** the Task.