"Process Admin" Redesign - Basic Use Case

Patrick is a Process Admin at a large healthcare payer. He uses the process admin section ("Manage") to manage tens of thousands of process instances. He routinely filters large datasets, based on specific criteria, to find a particular subset of instances. Through filtering datasets, he expects to isolate specific instances and identify problems.

Top 5 UX Priorities

1. Faceted filtering

Facets extend standard filters by allowing users to narrow results by **several** different dimensions simultaneously, offering maximum flexibility. Users quickly refine their options without losing context or scrolling through pages of irrelevant results when they are in search of something very specific.

2. Inventory switcher

Allows the user to switch process admin ("Manage") inventory screens quickly and easily, so they are able to stay in the flow of the task.

3. Redesign save filter

Expand and promote the feature that allows users to save filter queries by making it available for any type of filter query.

4. Redesign advanced filters

Improve usability of feature by exposing conditional filters progressively.

5. Revised master/detail interaction

Replace right panel detail screen with drill-down navigation, per PatternFly standards and user feedback.

Additional

- Show/Hide columns
- Multi-col sort
- Server selector

Redesign Proposal

* wireframe examples (PF styles not applied)

* [Interactive demo](#)

Open Issues

- Sorting presentation and behavior (primary & secondary.) Multi-col sort w/list headers currently references:
  https://datatables.net/examples/basic_init/multi_col_sort.html

Elements: Filters & Docks

CSS Deliverable at: https://issues.jboss.org/browse/BAPL-829

General Dock Controls

- *Controls and presentation will be picked up from the Workbench.*
- Panel closes using close button or Dock toggle button. Opens using toggle button. Content to the right should slide left when closing.
- Toggle has selected state.
- Dock toggle button includes tooltip "Basic filter."
- For each applied filter, a "tag" will be presented above the filter list of results.
- Naming and saving the query is an optional and separate action performed on the applied filters.
- Checkbox category filter group sections may be collapsed/expanded.

Basic Filters

Wireframe example only

- Filters are dynamically applied, with exception to the text input fieldset.
- Text input field may be filtered to Name, Process Instance ID, Correlation Key, Initiator or Any/All. Text input must be explicitly applied.
- Date dropdowns include: Today, Yesterday, Last week, Last month, and Custom. Custom presents a Date/Time range picker.
  - Inline clear (or reset) action for dates given that it is a more complex filter to reset.
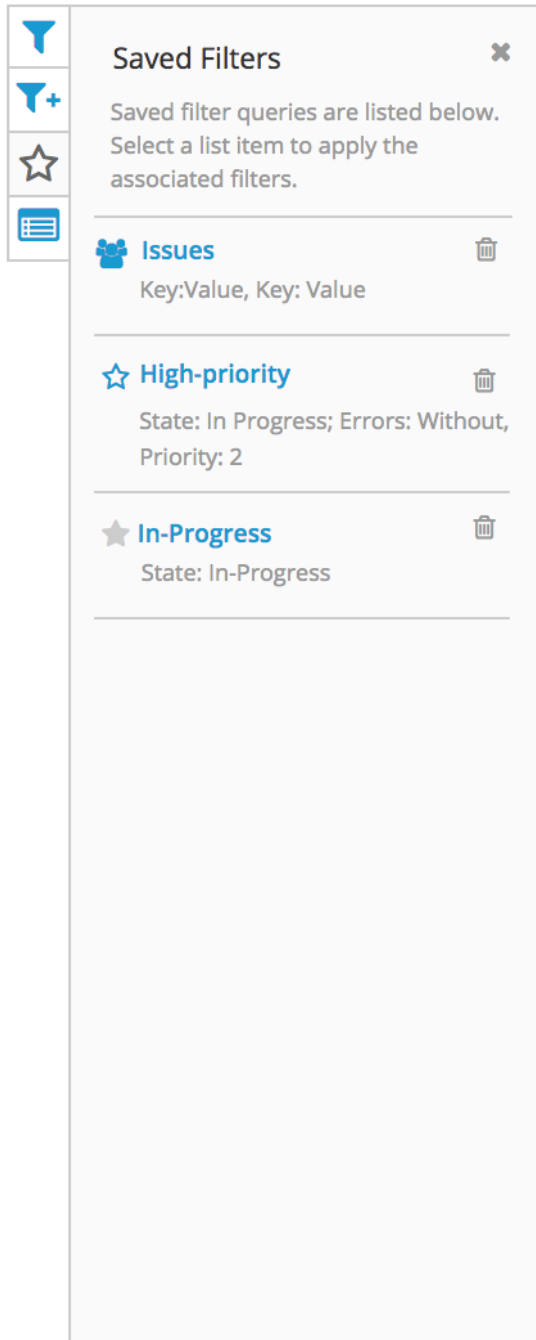
Advanced Filter

Wireframe example only

- Dock toggle button includes tooltip "Advanced filter."
- Filter presentation is conditional based on the user selection made in the "Filter Type" dropdown.
- Content offerings should match current implementation.
- Applied filters will reflect the expression created.
- Filters are applied when the "Apply" button is clicked.
  - For each applied filter, a "tag" will be presented above the filter list of results.
  - Once a filter is applied the form will be reset to support additional queries.
- "Clear" clears all user selections and resets the filters to show only the "Filter Type" dropdown.
- *Note: Naming and saving the query is an optional and separate action performed on the applied filters.*

Saved Filters

Saved Filters ✕

Saved filter queries are listed below. Select a list item to apply the associated filters.

👥 **Issues** 🗑
Key:Value, Key: Value

☆ **High-priority** 🗑
State: In Progress; Errors: Without, Priority: 2

★ **In-Progress** 🗑
State: In-Progress

Wireframe example only

- Dock toggle button includes tooltip "Saved filters."
- Saved filter lists may be removed (deleted) from the list by clicking the trash can button.
- Note: Naming and saving the query is an optional and separate action performed on the applied filters.
- Saved list is a group, with hover and selected states. The selected state applies the filters. Any modification to the applied filters clears the selected state.
- The named filter is prepended by an icon to represent the type of saved list: User generated (star), Team (users), System default (disabled/gray star).
- The user defined "Name" of filter is the list title and is a link.
- Selected filters are presented as a ~~comma delimited~~ vertically-stacked list of KVP's. A "more" link may be presented to show/hide a very long list.

Results Preferences

Display Preferences ✖

Customize columns

Customize the table presentation by selecting which columns to show in the results list.

- ☑ Actions
- ☐ Correlation Key
- ☑ Description
- ☑ Errors
- ☐ Initiator
- ☑ Last Update
- ☑ Process Instance ID
- ☑ Start Date
- ☑ State
- ☐ Version

[**Reset**]

Set per view limits

Select the number of results to display, per view.

- ◉ 10 results (default)
- ○ 25 results
- ○ 50 results

Wireframe example only

- **"Customize columns":**
  - Checking/unchecking items will show/hide the column within the results table.
  - "Reset" restores the default table view.
  - Identifying column (ID) and Actions column options are checked and disabled, they cannot be edited.
  - List is presented A-Z order.
- **Results Radio group:** User may select the number of results to view (or load) per page, 10 is the default selection.
- **Instructional text** - is presented below the section title. Placeholder content is represented.

Applying filters and saving queries

State: initial, no filters applied.

Wireframe example

Applying filters

One filter applied - "Save Filters" and "Clear All" actions are enabled.

Basic Filters ✕

State: Active x | Save Filters | Clear All

Process Instances | Bulk Actions ⇕ | 1-10 of about 100 |< < >

- State
  - ☑ Active
  - ☐ In-Progress
  - ☐ Aborted
  - ☐ Completed
  - ☐ Suspended
  - ☐ Pending

Errors
- ☐ With errors
- ☐ Without errors

Refine
Process Instance ID
Enter value
Apply

Start Date
Select

Last Update
Select

Reset Dates

	Process Instance ID	Errors	Description	State	Last Update	Actions
☐	0123451	1	Name or description...	✓ Active	Last week	⋮
☐	0123453	3	Name or description...	✓ Active	Today	⋮
☐	0123454	14	Name or description...	✓ Active	Last month	⋮
☐	0123455	5	Name or description...	✓ Active	Today	⋮
☐	01234531	0	Name or description...	✓ Active	Today	⋮
☐	01234532	3	Name or description...	✓ Active	Today	⋮
☐	01234533	0	Name or description...	✓ Active	Today	⋮
☐	01234538	2	Name or description...	✓ Active	Today	⋮
☐	01234539	3	Name or description...	✓ Active	Today	⋮
☐	012345310	4	Name or description...	✓ Active	Today	⋮

1-10 of about 100 |< < >

Multiple filters applied - Any instances with matches show in results table.

Basic Filters ✕

State: Active x | State:In-Progress x | Save Filters | Clear All

Process Instances | Bulk Actions ⇕ | 1-10 of about 100 |< < >

- State
  - ☑ Active
  - ☑ In-Progress
  - ☐ Aborted
  - ☐ Completed
  - ☐ Suspended
  - ☐ Pending

Errors
- ☐ With errors
- ☐ Without errors

Refine
Process Instance ID
Enter value
Apply

Start Date
Select

Last Update
Select

Reset Dates

	Process Instance ID	Errors	Description	State	Last Update	Actions
☐	0123451	1	Name or description...	✓ Active	Last week	⋮
☐	0123452	2	Name or description...	◯ In-Progress	Yesterday	⋮
☐	0123453	3	Name or description...	✓ Active	Today	⋮
☐	0123454	14	Name or description...	✓ Active	Last month	⋮
☐	0123455	5	Name or description...	✓ Active	Today	⋮
☐	01234531	0	Name or description...	✓ Active	Today	⋮
☐	01234532	3	Name or description...	✓ Active	Today	⋮
☐	01234533	0	Name or description...	✓ Active	Today	⋮
☐	01234534	0	Name or description...	◯ In-Progress	Today	⋮
☐	01234535	1	Name or description...	◯ In-Progress	Today	⋮

1-10 of about 100 |< < >

Applied filters (tags)

State: Active x	State:In-Progress x		Save Filters	Clear All
Process Instances		Bulk Actions ↕	1-10 of about 100	I< < >

- Any filter selected in the Filter dock panels will be applied to the list. Once applied it will be represented as a KVP label, above the results list, similar to: http://www.patternfly.org/pattern-library/content-views/list-view/#/overview

- Applied filters may be removed inline using the "x" control provided in the tag. This will also clear the corresponding filter in the left panel, with exception to Saved Filter lists.

- "Clear All" clears all the applied filters (and corresponding controls.)

Saving filter query

User may save a query by using the "Saved Filters" action. A pop-up is provided to name and save the filter.
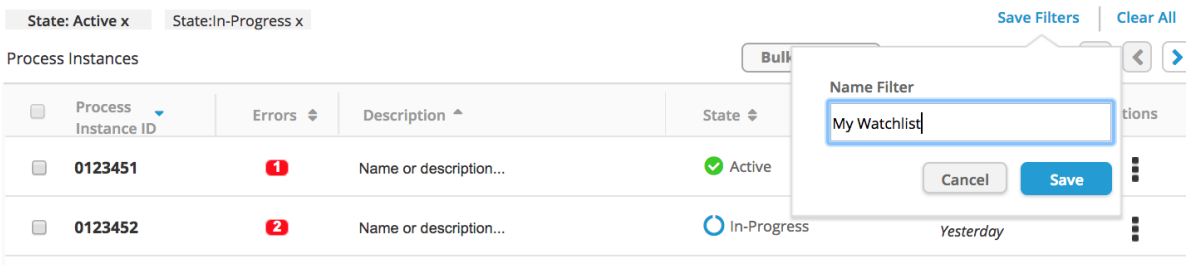
Wireframe example

- If the user wants to save a filter query, represented by the applied filters, they may use the "Save Filters" action.
- "A pop-up dialog to name and save the query.
- Saved queries are added to the list in the Saved Filters dock in the left panel area.

Saved queries

Saved filter queries are added to the "Saved Filters" (custom filters) panel.

Wireframe example

- Once saved, users may use the custom filter to "run" the filter query again. It is a short-cut action to perform a custom query.

Results List/table view

- Left panel filter and preferences docks perform actions on the table to the right.
- Sort table columns using controls on the headers. *Multi-col sort is Pending.
- Paginate the results list using pagination buttons.
- Push refresh the list of results.
- Perform bulk actions by selecting items using the checkboxes and the "Bulk Actions" dropdown/button.
- Clear and Save applied filters.
- Select a list item by clicking on the row to drill into the details.
- Click on individual links (Error badges) to navigate to filtered views.
- Perform actions on individual list items using the kebab button control.
- Navigate to other screens using the breadcrumb links.

Details view - interim design proposal

- Port existing details content to full page view.
- Use drill-down navigation to access details screen.
- Minimal to no restyling.
- Navigate back to list view using "X" close button or breadcrumbs.

≡ BPM/KIE

Home > Process Instance List >> Process Instance ID:9

Process Instance ID: 9   5 mins ago ⟳ | Action | **Primary Action** ⋮ ✖

| **Instance Details** | Process Variables | Documents | Logs | Process Model |

Definition Id	documents.documents
Instance State	Active
Deployment	documents_1.2.0
Definition Version	1.0
Correlation Key	9
Parent Process Instance	None
Active User Tasks	view (Reserved) owner:katy
Current Activities	Mon Nove 20 15:47:10 CET 2017: 1 - view (Human Task Node)

EXISTING CONTENT/LAYOUT
Example showing existing right aligned labels, left aligned values.

Details view - FUTURE design proposal

- Present details in building block-like components.
- Provide high-level details status through PatternFly "aggregate status cards.")
- Navigate back to list view using breadcrumbs (maybe "X" close button too.)

Inventory Switcher

- Switching inventory type (Process Instance, definition...) will also switch out dock panel content: Basic filters, advanced filters, saved filters and table preferences.
- Breadcrumb should reflect inventory selection.
- Menu list items for Process Admin/Manage section should remain the same, but link to pre-filtered views (eg. "Process Instances.")

Title area dropdown control
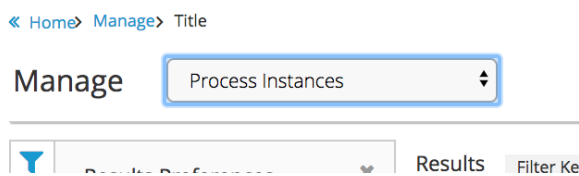
Switches inventory "pages"
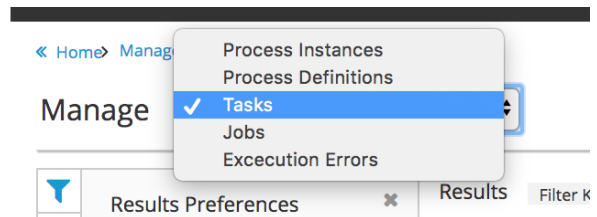
Server Selector

- User may change server using the selector dropdown in the upper-right, below the title area.
- Data is pulled from whichever server instance is selected.