



## “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)

The screenshot shows a web interface for managing process instances. At the top, there is a navigation bar with 'BPM/KIE' and a user profile icon. Below the navigation bar, there is a breadcrumb trail: '<< Home > Manage > Title'. The main content area is titled 'Manage' and contains a dropdown menu for 'Process Instances'. To the left of the main table is a 'Basic Filters' sidebar with sections for 'State' (containing a 'State' filter), 'Errors' (with checkboxes for 'With errors' and 'Without errors'), 'Select' (with a dropdown and 'Enter value' field), 'Start Date' (with a date picker), and 'Last Update' (with a date picker). The main table, titled 'Process Instances', has columns for 'Process Instance ID', 'Errors', 'Description', 'State', 'Last Update', and 'Actions'. The table contains 13 rows of data. A 'Bulk Actions' dropdown is located above the table. The interface also includes pagination controls showing '1-10 of about 100' items. Red circles with numbers 1 through 5 are overlaid on the interface to highlight specific elements: 1 on the 'State' filter, 2 on the 'Process Instances' dropdown, 3 on the 'Bulk Actions' dropdown, 4 on the 'Basic Filters' sidebar, and 5 on the 'Description' column header.

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	

\* [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](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

**Basic Filters** ✕

**State** ⊕

**Errors** ⊖

With errors

Without errors

Select ▾

Enter value

Apply

[Clear Dates](#)

**Start Date**

Select ▾ 📅

**Last Update**

Select ▾ 📅

- 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.

*Wireframe example only*

## Advanced Filter

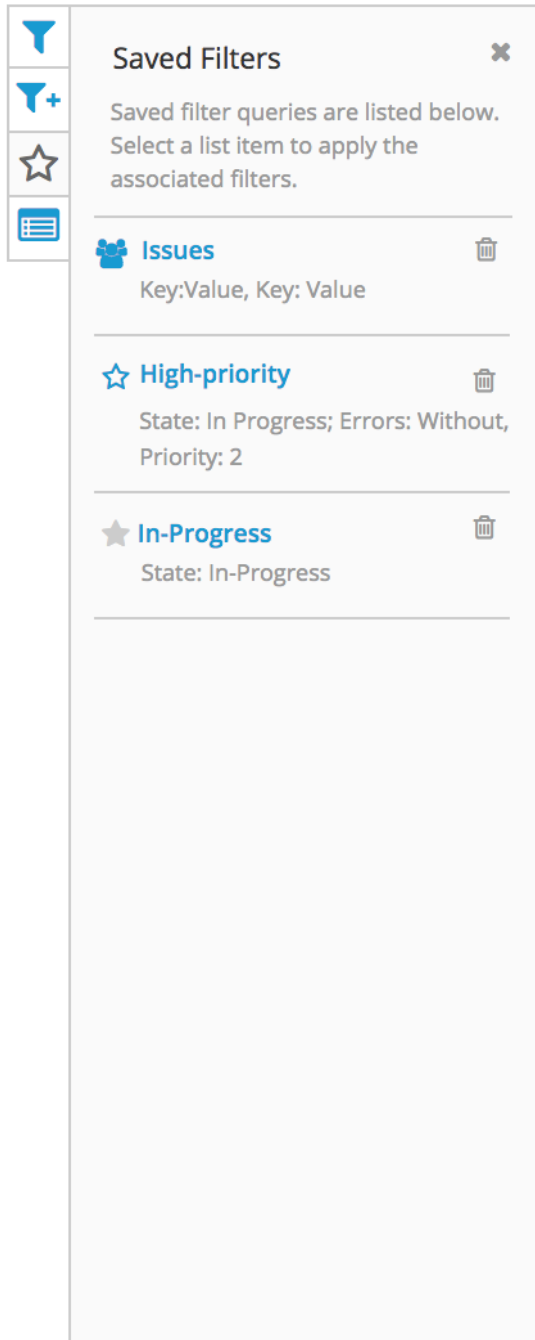
The wireframe shows a dialog box titled "Advanced Filter" with a close button (X) in the top right corner. On the left side, there is a vertical toolbar with four icons: a funnel, a funnel with a plus sign, a star, and a list icon. The main content area contains the following elements:

- Filter Type:** A dropdown menu currently showing "processInstanceID".
- Expression:** A dropdown menu currently showing "Greater than".
- Value Selection:** Two radio buttons are present. The first is labeled "Numeric value" and is selected; it is followed by a text input field containing the number "23". The second radio button is labeled "'Null'".
- Buttons:** At the bottom, there are two buttons: "Clear" (in blue text) and "Apply" (in a grey button).

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



- 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.

*Wireframe example only*

## 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

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#### Set per view limits

Select the number of results to display, per view.

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

- **“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.

*Wireframe example only*

# Applying filters and saving queries

State: initial, no filters applied.

The wireframe shows a dashboard for process instances. On the left is a 'Basic Filters' sidebar with sections for State, Errors, Refine, Start Date, and Last Update. The main area displays a table of process instances with columns for ID, Errors, Description, State, Last Update, and Actions. The table is currently empty, showing only headers. Navigation and pagination controls are visible at the top and bottom of the table area.

**Basic Filters**

- 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

*No filters are applied.*

Process Instances Bulk Actions | 1-10 of about 100

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

Wireframe example



## Applying filters

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

The screenshot shows a web interface for managing process instances. On the left, a 'Basic Filters' sidebar is open, showing the 'State' filter with 'Active' selected. The main area displays a table of process instances under the filter 'State: Active x'. The table has columns for Process Instance ID, Errors, Description, State, Last Update, and Actions. The 'Save Filters' and 'Clear All' buttons are visible in the top right corner.

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	

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

The screenshot shows the same web interface, but now with two filters applied: 'State: Active x' and 'State: In-Progress x'. The table now includes instances in both 'Active' and 'In-Progress' states. The 'Save Filters' and 'Clear All' buttons remain visible.

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	

## Applied filters (tags)

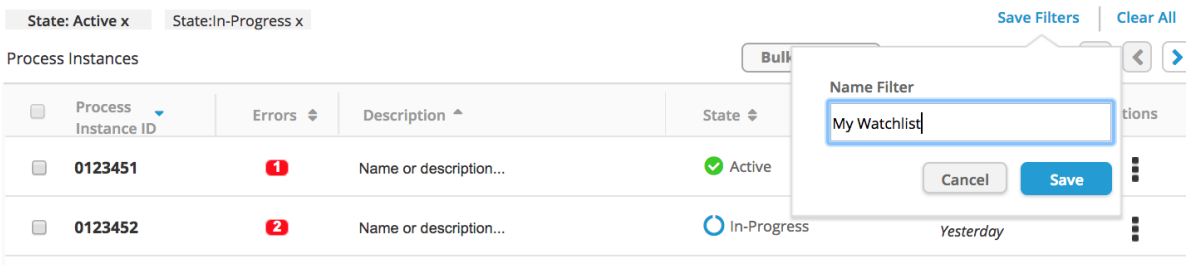


The screenshot shows a header area with a horizontal bar at the top divided into four colored segments: gold, teal, orange, and dark grey. Below this, the text "Applied filters (tags)" is displayed. Underneath, there is a filter dock with two active filters: "State: Active x" and "State: In-Progress x". To the right of the filters are links for "Save Filters" and "Clear All". Below the filter dock, the text "Process Instances" is visible. To the right of this text is a "Bulk Actions" dropdown menu, a pagination indicator "1-10 of about 100", and three navigation buttons: a vertical bar with a left arrow, a left arrow, and a right arrow.

- 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.

The wireframe shows a dashboard with a left sidebar and a main content area. The sidebar contains a 'Saved Filters' panel with a search icon, a plus icon, a star icon, and a list icon. Below the search icons are four filter items: 'Issues' (Key:Value, Key: Value), 'High-priority' (State: In Progress; Errors: Without, Priority: 2), 'In-Progress' (State: In-Progress), and 'My Watchlist' (State: Active, State:Process). The main content area has a header with 'State: Active x' and 'State:In-Progress x' tabs, and a 'Bulk Actions' button. Below the header is a table titled 'Process Instances' with columns for 'Process Instance ID', 'Errors', 'Description', and 'State'. The table contains seven rows of data.

Process Instance ID	Errors	Description	State
0123451	1	Name or description...	Active
0123452	2	Name or description...	In-Progress
0123453	3	Name or description...	Active
0123454	14	Name or description...	Active
0123455	5	Name or description...	Active
01234531	0	Name or description...	Active

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 presentation is tbd based on table implementation.*
- Paginate the results list using pagination buttons.
- Push refresh the list of results. \* *To match Details view timestamp should use relative time next to button, timestamp as hover tip.*
- 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.

The screenshot shows the 'Manage Process Instances' interface. On the left is a 'Basic Filters' sidebar with sections for State (Active, In-Progress, Aborted, Completed, Suspended, Pending), Errors (With errors, Without errors), Refine (Process Instance ID), Start Date, and Last Update. The main area displays a table of process instances with columns for Process Instance ID, Errors, Description, State, Last Update, and Actions. The table shows 15 instances with various states and error counts. A 'Bulk Actions' dropdown and pagination controls are visible at the top right of the table.

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	3	Name or description...	Active	Today	
01234532	3	Name or description...	Active	Today	
01234533	3	Name or description...	Active	Today	
01234534	3	Name or description...	In-Progress	Today	
01234535	1	Name or description...	In-Progress	Today	

## 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.

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.)

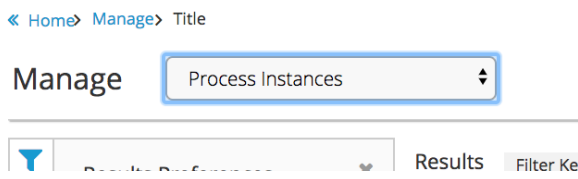
The screenshot displays the 'Instance Details' page for a process instance with ID 00012345. The page is structured as follows:

- Header:** 'BPM/KIE' logo and navigation icons.
- Breadcrumbs:** '< Back | Manage Process List > Instance Details'.
- Process Instance ID:** '00012345' with an 'Action' button.
- Summary Cards:** Three cards showing '300 Unacknowledged Errors', '150 Active Jobs', and '5 User Tasks'.
- Process Diagram:** A flowchart titled 'Parent Process: Loan' with steps: 'Obtain Customer Info', 'Create Customer', 'Call Customer For Comments', 'Add Customer Comments', and 'Managers Review'. The 'Call Customer For Comments' step is highlighted in red.
- Details Panel (Left):** Shows 'Active' status, deployment 'Staging', definition version '1.0', correlation key '200100', and parent process instance 'N/A'.
- Documents Panel (Left):** Lists 'Document 1' (created 3 days ago by aimee) and 'Document 2' (created 1 week ago by cameron).
- Active Task Panel (Right):** Shows task name 'Call Customer', started on 'Nov 20, 2017 15:39', and assignee 'aperson'.
- Activities Panel (Right):** Includes a 'Today' filter, a line graph, and a list of activities such as 'Start Node', 'Self Evaluation (Task Node) - System', 'HR Evaluation (Task Node) - System', 'Finance Evaluation (Task Node) - System', and another 'Start Node'.

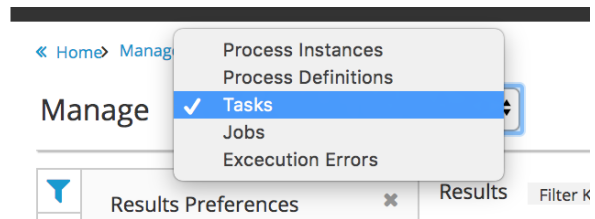
## Inventory Switcher

- 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.

