



# **Red Hat Process Automation Manager 7.1**

## **Interacting with processes and tasks**



# Red Hat Process Automation Manager 7.1 Interacting with processes and tasks

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## Abstract

This document describes how to run processes and tasks of business process applications using Business Central in Red Hat Process Automation Manager 7.1.

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## PREFACE

As a knowledge worker, you use Business Central in Red Hat Process Automation Manager to run processes and tasks of the business process application developed by citizen developers. A business process is a series of steps which must be executed in a defined manner according to the process flow. You must have sound knowledge of the business process and should be able to determine the current step of a process or task. You can start and stop tasks, search and filter tasks and process instances, delegate, claim and release tasks, set due date and priority of tasks, view and add comments to tasks, and view the task history log.

### Prerequisites

- Installed Red Hat Process Automation Manager on Red Hat JBoss Enterprise Application Platform 7.1.x. For more information, see [Installing and configuring Red Hat Process Automation Manager on Red Hat JBoss EAP 7.1](#).
- Red Hat Process Automation Manager is running and you can log in to Business Central with the user role.

## CHAPTER 1. OVERVIEW

A business process application created using Business Central in Red Hat Process Automation Manager by citizen developers depicts the flow of the business process as a series of steps. Each step executes according to the process flow chart. A process can consist of one or more smaller discrete tasks. As a knowledge worker, you work on processes and tasks that occur during business process execution.

As an example, using Red Hat Process Automation Manager, the mortgage department of a financial institution can automate the complete business process for a mortgage loan. When a new mortgage request comes in, a new process instance is created in the mortgage application. Because all requests follow the same set of rules for processing, consistency in every step is ensured. This results in an efficient process which reduces processing time and effort.

### 1.1. DEFINITION OF A KNOWLEDGE WORKER USER

Consider the example of a customer account representative processing mortgage loan requests at a financial institution. As a customer account representative, you can perform the following tasks:

- Accept and decline mortgage requests
- Search and filter through requests
- Delegate, claim, and release requests
- Set due date and priority on requests
- View and comment on requests
- View the request history log



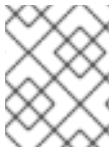
## CHAPTER 2. OVERVIEW OF KNOWLEDGE WORKER TASKS

A task is a part of the business process flow that a given user can claim and perform. You can handle tasks from the **Task Inbox** page of Business Central. It displays the task list for the logged-in user. A task can be assigned to a particular user, multiple users, or to a group of users. If assigned to multiple users or a group of users, it is visible in the task lists of all the users and any user can claim the task. When a task is claimed by a user, it is removed from the task list of other users.

This chapter covers the actions which a user can perform on tasks when executing a business process.

### 2.1. STARTING AND STOPPING TASKS

You can start and stop user tasks from the **Tasks** and **Task Inbox** page.



#### NOTE

Ensure that you are logged in and have appropriate permissions for starting and stopping tasks.

#### Starting a task

##### Procedure

1. In Business Central, go to **Menu** → **Track** → **Task Inbox**.
2. On the **Task Inbox** page, click the task to open it.
3. On the **Work** tab of the task page, click **Start**. Once you start a task, its status changes to **InProgress**.

You can view the status of tasks on the **Task Inbox** as well as on the **Manage Tasks** page.



#### NOTE

Only users with process-admin role can view the task list on the **Manage Tasks** page. Though admin role users can also access the page but they will always see an empty task list unless an additional role permission setup is performed on the Process Server.

#### Stopping a task

##### Procedure

1. In Business Central, go to **Menu** → **Track** → **Task Inbox**.
2. On the **Task Inbox** page, click the task to open it.
3. On the **Work** tab of the task page, click **Complete**.

### 2.2. DELEGATING, CLAIMING, AND RELEASING TASKS

After tasks are created in Business Central, you can delegate them to others, claim released tasks, and release your tasks for others to claim. A user assigned with any role can perform all these actions on the tasks visible to it.

**NOTE**

In **Task Inbox** page, **Actual Owner** column displays the name of the current owner of the task.

**Delegating a task****Procedure**

1. In Business Central, go to **Menu** → **Track** → **Task Inbox**.
2. On the **Task Inbox** page, click the task to open it.
3. On the task page, click the **Assignments** tab.
4. In the **User** field, enter the name of the user or group you want to delegate the task to.
5. Click **Delegate**. Once a task is delegated, the owner of the task changes.

**Claiming a task**

A user can claim a task from the **Task Inbox** page only if the task is assigned to a group the user belongs to.

**Procedure**

1. In Business Central, go to **Menu** → **Track** → **Task Inbox**.
2. On the **Manage Tasks** page, click the task to open it.
3. On the **Work** tab of the task page, click **Claim**. Alternatively, on the **Manage Tasks** page, click **Claim** from the three dots in the **Actions** column.  
The user who claims a task becomes the owner of the task.

**Releasing a task****Procedure**

1. In Business Central, go to **Menu** → **Track** → **Task Inbox**.
2. On the **Task Inbox** page, click the task to open it.
3. On the task page, click **Release**. A released task has no owner.

## 2.3. FILTERING TASKS USING BASIC OR ADVANCED FILTERS

Business Central provides built-in filters to help you search tasks. You can filter tasks by attributes such as **Status**, **Filter By**, **Process Definition Id**, and **Created On**. It is also possible to create custom task filters using the **Advanced Filters** option. The newly created custom filter is added to the **Saved Filters** pane, which is accessible by clicking on the star icon on the left of the **Task Inbox** page.

**Filtering tasks using basic filters****Procedure**

1. In Business Central, go to **Menu** → **Track** → **Task Inbox**.

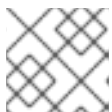
2. On the **Task Inbox** page, click the filter icon on the left of the page to expand the **Filters** pane. This pane lists the following task attributes which you can use to filter tasks:
  - a. **Status**: Filter tasks based on their status.
  - b. **Filter By**: Filter tasks based on **Id**, **Task**, **Correlation Key**, **Actual Owner**, or **Process Instance Description** attribute.
    - i. Select the required attribute.
    - ii. Enter the search query in the text field below.
    - iii. Click **Apply**.
  - c. **Process Definition Id**: Filter tasks based on process definition ids.
  - d. **Created On**: Filter tasks based on their creation date.

You can use the **Advanced Filters** option to create custom filters in Business Central.

### Filtering tasks using advanced filters

#### Procedure

1. In Business Central, go to **Menu** → **Track** → **Task Inbox**.
2. On the **Task Inbox** page, click the **Advanced Filters** icon on the left of the page to expand it.
3. In the **Advanced Filters** tab, enter the name and description, and click **Add New**.
4. Select an attribute from the **Select column** drop-down list, for example, **Name**. The content of the drop-down changes to **Name != value1**.
5. Click the drop-down again and choose the required logical query. For the **Name** attribute, choose **equals to**.
6. Change the value of the text field to the name of the task you want to filter.



#### NOTE

The name must match the value defined in the business process of the project.

7. Click **Save** and the tasks are filtered according to the filter definition.
8. Click on the star icon to open the **Saved Filters** pane.  
In the **Saved Filters** pane, you can view the saved advanced filters.

## 2.4. FILTERING PROCESS INSTANCES USING BASIC OR ADVANCED FILTERS

Business Central now provides you with basic and advanced filters to help you filter and search through process instances. You can filter processes by attributes such as **State**, **Errors**, **Filter By**, **Name**, **Start Date**, and **Last update**. You can also create custom filters using the **Advanced Filters** option. The newly created custom filter is added to the **Saved Filters** pane, which is accessible by clicking on the star icon on the left of the **Manage Process Instances** page.

**NOTE**

All users except those with **manager** or **rest-all** roles can access and filter process instances in Business Central.

### 2.4.1. Filtering process instances using basic filters

Business Central provides basic filters for filtering and searching through process instances based on their attributes such as **State**, **Errors**, **Filter By**, **Name**, **Start Date**, and **Last update**.

**Procedure**

1. In Business Central, go to **Menu** → **Manage** → **Process Instances**.
2. On the **Manage Process Instances** page, click the filter icon on the left of the page to expand the **Filters** pane.  
This pane lists the following process attributes which you can use to filter process instances:
  - **State**: Filter process instances based on their state (**Active**, **Aborted**, **Completed**, **Pending**, and **Suspended**).
  - **Errors**: Filter process instances that contain at least one or no errors.
  - **Filter By**: Filter process instances based on **Id**, **Initiator**, **Correlation Key**, or **Description** attribute.
    - i. Select the required attribute.
    - ii. Enter the search query in the text field below.
    - iii. Click **Apply**.
  - **Name**: Filter process instances based on process definition name.
  - **Start Date**: Filter process instances based on their creation date.
  - **Last update**: Filter process instances based on their last modified date.

You can also use the **Advanced Filters** option to create custom filters in Business Central.

### 2.4.2. Filtering process instances using advanced filters

You can create custom process instance filters using the **Advanced** filters option in Business Central.

**Procedure**

1. In Business Central, go to **Menu** → **Manage** → **Process Instances**.
2. On the **Manage Process Instances** page, click on **Advanced Filters** icon.
3. In the **Advanced Filters** pane, enter the name and description of the filter, and click **Add New**.
4. Select an attribute from the **Select column** drop-down list, for example, **processName**. The content of the drop-down changes to **processName != value1**.

5. Click the drop-down again and choose the required logical query. For the **processName** attribute, choose **equals to**.
6. Change the value of the text field to the name of the process you want to filter.



#### NOTE

The *processName* must match the value defined in the business process of the project.

7. Click **Save** and the processes are filtered according to the filter definition.
8. Click on the star icon to open the **Saved Filters** pane.  
In the **Saved Filters** pane, you can view all the saved advanced filters.

## 2.5. SETTING THE DUE DATE AND PRIORITY OF A TASK

You can set the priority, due date and time of a task in Business Central from the **Task Inbox** page. Note that all users may not have permissions for setting priority and the due date of a task.

### Procedure

1. In Business Central, go to **Menu** → **Track** → **Task Inbox**.
2. On the **Task Inbox** page, click the task to open it.
3. On the task page, click the **Details** tab.
4. In the **Due Date** field, select the required date from the calendar and the due time from the drop-down list.
5. In the **Priority** field, select the required priority.
6. Click **Update**.

## 2.6. VIEWING AND ADDING COMMENTS TO A TASK

You can add comments to a task and also view the existing comments of a task in Business Central.

### Procedure

1. In Business Central, go to **Menu** → **Track** → **Task Inbox**.
2. On the **Task Inbox** page, click the task to open it.
3. On the task page, click the **Comments** tab.
4. In the **Comment** field, enter the comment and click **Add Comment**.

All task comments are displayed in a tabular form in the **Comments** tab.

## 2.7. VIEWING THE HISTORY LOG OF A TASK

You can view the history log of a task in Business Central from the **Logs** tab of task. The history log lists all the events in the "Date Time: Task event" format.

### Procedure

1. In Business Central, go to **Menu** → **Track** → **Task Inbox**.
2. On the **Task Inbox** page, click the task to open it.
3. On the task page, click the **Logs** tab.  
All events that take place during the task life cycle is listed in the **Logs** tab.

## CHAPTER 3. MIGRATING BUSINESS PROCESSES FROM NEW TO LEGACY PROCESS DESIGNER

You can migrate a business process from the new process designer in Business Central to the legacy process designer. By default, all business processes open in the new process designer. But once you migrate a business process, it will always open in the legacy designer.



### IMPORTANT

Migrating business processes is an irreversible process.

### Procedure

1. Log in to Business Central and go to **Menu** → **Projects**.
2. From **Assets** tab, select the business process. It will open in the new process designer.
3. Click **Migrate** and a warning will appear.
4. Click **Migrate Diagram**.  
The process designer restarts and the business process re-opens in the legacy process designer.

**Migrating** a business process results in two changes:

- The name of the business process in the process designer changes, for example:
  - Name in new process designer: business-process-name.bpmn - Business Processes
  - Name in legacy process designer: business-process-name.bpmn2 - Business Processes (legacy)
- The extension of the business process changes from \*.bpmn to \*.bpmn2.

## APPENDIX A. VERSIONING INFORMATION

Documentation last updated on Friday, October 12, 2018.