



Red Hat Process Automation Manager 7.2

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 7.2.

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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.

Prerequisite

- Red Hat Process Automation Manager is installed. For installation options, see [Planning a Red Hat Process Automation Manager installation](#).

CHAPTER 1. BUSINESS PROCESSES IN BUSINESS CENTRAL

A business process application created by a citizen developer in Business Central 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. 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. KNOWLEDGE WORKER TASKS IN BUSINESS CENTRAL

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 A TASK

You can start 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.

Procedure

1. Log in to Business Central and click **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.

2.2. STOPPING A TASK

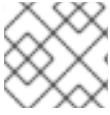
You can stop user tasks from the **Tasks** and **Task Inbox** page.

Procedure

1. Log in to Business Central and click **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**.

2.3. DELEGATING A TASK

After tasks are created in Business Central, you can delegate them to others.

**NOTE**

A user assigned with any role can delegate, claim, or release tasks visible to it.

**NOTE**

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

Procedure

1. Log in to Business Central and click **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.

2.4. CLAIMING A TASK

After tasks are created in Business Central, you can claim the released tasks. 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. Log in to Business Central and click **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.

2.5. RELEASING A TASK

After tasks are created in Business Central, you can release your tasks for others to claim.

Procedure

1. Log in to Business Central and click **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.

CHAPTER 3. TASK FILTERING IN BUSINESS CENTRAL

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.

3.1. FILTERING TASKS USING BASIC FILTERS

Business Central provides basic filters for filtering and searching through tasks based on their attributes such as **Status**, **Filter By**, **Process Definition Id**, and **Created On**.

Procedure

1. Log in to Business Central and click **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.

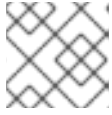
You can use the **Advanced Filters** option to create custom filters in Business Central.

3.2. FILTERING TASKS USING ADVANCED FILTERS

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

Procedure

1. Log in to Business Central and click **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 the star icon to open the **Saved Filters** pane.
In the **Saved Filters** pane, you can view the saved advanced filters.

3.3. DEFINING SPECIAL FILTERS FOR TASKS

You can use the **Advanced** filters option in Business Central to create special filters for tasks in **Manage Tasks** and **Task Inbox**. When you create a special filter with the task defined, you can view the task variables of the task as columns using **Show/hide columns**.

Procedure

1. In Business Central, click **Menu** → **Manage** → **Tasks** or click **Menu** → **Track** → **Task Inbox**.
2. On the **Manage Tasks** page or the **Task Inbox** page, click the **Advanced Filters** icon.
3. In the **Advanced Filters** pane, enter the name and description of the filter, and click **Add New**.
4. From the **Select column** list, select the **name** attribute. The value will change to **name != value1**.
5. From the **Select column** list, select **equals to** for the logical query.
6. In the text field, enter the name of the task.
7. Click **Save** and the filter is applied on the current task list.
8. Click **Show/hide columns** on the upper right of the tasks list and the task variables of the specified task id will be displayed.
9. Click the star icon to open the **Saved Filters** pane.
In the **Saved Filters** pane, you can view all the saved advanced filters.

CHAPTER 4. PROCESS INSTANCE FILTERING IN BUSINESS CENTRAL

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.

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, click **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.

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, click **Menu** → **Manage** → **Process Instances**.
2. On the **Manage Process Instances** page, click the **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 the star icon to open the **Saved Filters** pane.
In the **Saved Filters** pane, you can view all the saved advanced filters.

4.3. DEFINING SPECIAL FILTERS FOR PROCESS INSTANCES

You can use the **Advanced** filters option in Business Central to create special filters for process instances. When you create a special filter over the column **processId**, you can view the process instance variables of the process as columns using **Show/hide columns**.

Procedure

1. In Business Central, click **Menu** → **Manage** → **Process Instances**.
2. On the **Manage Process Instances** page, click the **Advanced Filters** icon.
3. In the **Advanced Filters** pane, enter the name and description of the filter, and click **Add New**.
4. From the **Select column** list, select the **processId** attribute. The value will change to **processId != value1**.
5. From the **Select column** list, select **equals to** for the logical query.
6. In the text field, enter the name of the process id.
7. Click **Save** and the filter is applied on the current process instance list.
8. Click **Show/hide columns** on the upper right of the process instances list and the process instance variables of the specified process id will be displayed.
9. Click the star icon to open the **Saved Filters** pane.
In the **Saved Filters** pane, you can view all the saved advanced filters.

CHAPTER 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. Log in to Business Central and click **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**.

CHAPTER 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. Log in to Business Central and click **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.

CHAPTER 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. Log in to Business Central and click **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 8. VIEWING THE HISTORY LOG OF A PROCESS INSTANCE

You can view the history log of a process instance in Business Central from its **Logs** tab. The log lists all the events in the **Date Time: Event Node Type: Event Type** format.

You can filter the logs based on **Event Node Type** and **Event Type**. You can also view the details of the human nodes in the logs.

Procedure

1. Log in to Business Central and click **Menu → Manage → Process Instances**.
2. On the **Process Instances** page, click the process instance whose log you want to view.
3. On the instance page, click the **Logs** tab.
4. Select the required check boxes from **Event Node Type** and **Event Type** pane to filter the log as per your need.
5. To view additional information regarding human nodes, expand **Details**.
6. Click **Reset** to revert to the default filter selection.
All events that occur in a process instance life cycle are listed in the **Logs** tab.

CHAPTER 9. 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 click **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

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