

PROCESS MANAGER USER GUIDE



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Process Manager User Guide

1. Introduction

This document serves as a user guide for users that want to manage process instances. AgileXRM Process Manager is the tool used to monitor the status of a process instance and to perform specific actions in this instance.

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2. Opening AgileXRM Process Manager

Process Manager can be accessed from CRM records that have an associated process instance. There is a tab in entity form (called View Process) in CRM entities that are enabled to have AgileXRM processes:

Case: CAS-01000-F4VR8N -	windows Internet Explorer
Save and Clos	e 🔓 🎒 🕘 🗾 Follow Up 🎸 Run Workflow 🔖 Actions 🗸
	Case: CAS-01000-F4VR8N
Details:	General Notes and Article View Process
🗐 Information	
📝 Activities	
- History	

This tab shows process execution in real-time:

	See Constant means E Information means annualses (menum)	
	Re Holycheck Tablet Hamperson Version: 1.15. Data Stanton, 10/21/2010 3:12:15 PM, Status Basering	
en anna anna anna anna anna anna anna a		
Defecto		
	AGILEXRM HelpDesk Ticket Management Process	
	Ticket Evaluation Ticket Resolution	
	Addread into	
	- Andrew -	
	r	
	Const Const	
	The first first	
	Customer Conformance	

In CRM 2011 Process Manger is presented using tab called View Process:

Filt Care Add Dude	mine	Ja Mor	soft Dynamics CRM		Mike Keleher
Save & Save & New Save & X Delete Save	Resolver Cancel Con	Add to Queue Ren Assign & Copy a Link With Californity	Run Start Rep Process Do	nn - 	
formation General	Case CAS-010	002-K2G0J8			(Cerer + 0 0
View Process	* General				Form Assistant >
Indated	Overview				Form Assistant Help
Common	UpdateTimer	C No C Yes	Enable EventLister	HT Cites @ No	Form Assistant Help
Adwities	MpDateTime				Select a lookup field.
Connections	Title *	Bet			
Audit History	Customer*	Microsoft			
Product Defects	Subject	🖬 Refault Subject	Case Type	Product Info	
Processes	Cate Origin		Satisfaction	[
Ci Workflows	Assignment Inf	ormation			
	Owner*	S Mike Kelleber	Status Reason	in Progress	
	Follow Up By	3~	Priority	[Vormal	
	Contract and Pr	reduct Information			
	Contract		Product		
	Contract Line		Serial Number	<u></u>	
	Service Level				
	* Notes and Art	licle			
	Statui	Active			





By default, the tab is hidden, when the user opens the tab, the Process Manager is opened:



Each activity has information about its status (in the icon in the top-left). In this sample Tier 1 Review is assigned and when the activity is clicked specific information is presented:



Session 2 means that this activity has been executed twice. Information about status, assignation date,... is saved for each iteration:







Process Manager can be accessed using a URL. This is useful, for instance to include links to Process Manager in emails. This is the format of the URL:

http://<AgileXRMServer>/XRMProcessViewer/RealTimeProcessManager.aspx?PIID=<ProcessInst
aceID>

3. Process Manager Toolbox

In the top of Process Manager available options are presented. These options are presented based on user permissions, so if the user has no permissions to perform an action the corresponding button is not presented. These permissions are configured from Envision and are stored in CRM. Buttons in this toolbox are enabled or disabled based on process status.



3.1.1 Cancel a process instance

This is the button used to cancel the process instance:



When this button is clicked all active activities are cancelled. **A cancelled process cannot be restarted**. Only running processes can be cancelled.







3.1.2 Suspend a process instance

This is the button used to Suspend a process instance:



Only running processes can be suspended.

When a process is suspended all running activities are changed to suspended status:

HelpDesk Tick	It Hanagement Version: 1.15. Date Started: 10/21/2010 3:11:35 PM. Status: Suspended
° •	Ticket Evaluation

Users cannot complete activities in a suspended process.

3.1.3 Resume a process instance

This is the button used to Resume a process.



Only suspended processes can be resumed. When a process is resumed used can completed its activities.





3.1.4 Change process flow

This is the button used to change the flow:



Flow change can be done only in running processes.

AgileXRM allows changing the process flow in real-time. This feature is useful in scenarios where some steps must be skipped or the user wants to go back in the process flow (for instance if there has been a mistake in previous steps).

When Change flow is clicked this window is opened:



In order to change the flow, there must be one or more origin activities (activities that are active) and one or more destination activities. That means that flow can be split or joined using this feature.





To select origin activities click on active activity or activities to select them. Active activities appear flashing in green in this screen. When an origin activity is selected its shape is rounded by a red square:



To select destination activities click on activities that are not active. Selected activity or activities will be rounded by a green square:



In this sample the process will be moved from Tier 1 Review to Additional Info. When the change is accepted (click ok button) Tier 1 Review will be cancelled and a new task will be created in Additional Info activity.



Process flow can be changed to go forward or backward.





Change flow screen allows repeating an active activity:

	Ticket Evaluation
•	Budnet Tool + Tool Tool Tool Tool Tool Tool To

To do that select a running activity and click the button on the bottom left. Doing that, the selected activity is repeated an the process flow is redirected to this activity.

3.1.5 View Process Details

This is the button used to view process details:



This feature shows details about process execution. This information is useful for auditing.





Manual Tasks tab

Temperatur Version Ver	- maperine reserv		an					Contraines 2110 con		
Indiat Cale II AGLEPOINT/Administrator AGLEPOINT/Administrator Complete 6 (27)/2011 513:00 PM (22)/2011 5	Name	Session	Original User	User	Status	Assigned Date	Due Date	Completion Date	Cancellation Date	Template Name
Case Rooken 1 AGLIEPOINT/Administrator AGLIEPOINT/Administrator Completed (V20/2013.5333/00 MF 6/22/2013.72530 MF 2/22/2013.72530 MF HelpOint/Administrator AGLIEPOINT/Administrator Overdee (V20/2013.72530 MF 6/22/2013.72530 MF 2/22/2013.72530 MF HelpOint/Administrator AGLIEPOINT/Administrator Overdee (V20/2013.72530 MF 6/22/2013.72530 MF 2/22/2013.72530 MF HelpOint/Administrator AGLIEPOINT/Administrator Overdee (V20/2013.72530 MF 6/22/2013.72530 MF 2/22/2013.72530 MF HelpOint/Administrator AGLIEPOINT/Administrator Overdee (V20/2013.72530 MF 6/22/2013.72530 MF 2/22/2013.72530 MF HelpOint/Administrator AGLIEPOINT/Administrator Overdee (V20/2013.72530 MF 6/22/2013.72530 MF 2/22/2013.72530 MF 4/22/2013.72530 MF 4/22/2013.72500 MF 4/22/2013.72500 MF 4/22/2013.72500 MF 4/22/2013.72500 MF 4/22/2013.72500 MF 4/22/2013.72500 MF 4/22/201000 MF 4/22/20100000000000000000000000000000000	Initiate Case	1	AGILEPOINTVAdministrator	AGILEPOINTVAdministrator	Completed	6/20/2011 5:53:00 PM	6/21/2011 5:53:00 PM	6/20/2011 5:53:00 PM		HelpDesk Ticket Ma
Accept Solubion 1 AddLEPOINT/Administrator (Overdue A/20/2011/2/2010/7/29/00 PM //2/2/2011/2/2000 PM /////////////////////////////////	Case Review	1	AGILEPOINTVAdministrator	AGILEPOINTVAdministrator	Completed	6/20/2011 5:53:00 PM	6/21/2011 5:53:00 PM	6/20/2011 7:29:59 PM		HelpDesk Ticket Ma
	Accept Solution	1	AGILEPOINT\Administrator	AGILEPOINT\Administrator	Overdue	6/20/2011 7:29:59 PM	6/21/2011 7:29:00 PM			HelpDesk Ticket Ma

The first tab shows information about Manual tasks in current process and its sub-processes.

Manual Tasks Tree tab

The second tab shows the same information but in hierarchical mode:

lelpDesk Ti	cket	Managem	ent:_!_HelpDesk Ticke	t Management 06-20-11 ()5:52:59	_!_2d8	30744c58t54b58	60307	0a3dcb68e69_ir	nciden	t_0646afa5-
Name		Session	Original User	User	Stat	us	Assigned Date		Due Date		Completion D
Initiate Ca	se	1	AGILEPOINT\Administr	ator AGILEPOINT\Administr	ator Com	pleted	6/20/2011 5:53:	00 PM	6/21/2011 5:53:	00 PM	6/20/2011 5
Case Revie	w	1	AGILEPOINT\Administr	ator AGILEPOINT\Administr	ator Com	pleted	6/20/2011 5:53:	00 PM	6/21/2011 5:53:	00 PM	6/20/2011 7
Accept Sol	ution	1	AGILEPOINT\Administr	ator AGILEPOINT\Administr	ator Can	elled	6/20/2011 7:29:	59 PM	6/21/2011 7:29:	00 PM	
					0000100-					1	
Name	Ses	sion Ori	ginal User	User	Status	Assig	ned Date	Due D	Date	Comp	letion Date
Name Review	Ses:	sion Ori AG	ginal User ILEPOINT\Administrator	User AGILEPOINT\Administrator	Status Assigned	Assig 6/28,	ned Date /2011 8:42:51 PM	Due 0	Date 2011 8:42:00 PM	Comp	oletion Date





Activities tab

Activities tab shows information about all activities:

↓ H	elpDesk Ticket Manag	ement:_!	_HelpDesk	Ticket Management 0	5-20-11 05:52:59_!_20	d80744c58f54b58b03070a3dcb68e69_incident_0646afa
	Name	Session	Status	Start Date	Completion Date	
2	START	1	Passed	6/20/2011 5:53:00 PM	6/20/2011 5:53:00 PM	
2	Submit Ticket	1	Passed	6/20/2011 5:53:00 PM	6/20/2011 5:53:00 PM	
2	Tier 1 Review	1	Passed	6/20/2011 5:53:00 PM	6/20/2011 7:29:59 PM	
2	More Info?	1	Passed	6/20/2011 7:29:59 PM	6/20/2011 7:29:59 PM	
2	Ticket Type	1	Passed	6/20/2011 7:29:59 PM	6/20/2011 7:29:59 PM	
9	Accept Solution Dialog	1	Activated	6/20/2011 7:29:59 PM		
0	Product Defect	1	Active	6/28/2011 8:42:33 PM		
۲	Close Ticket	0				
						· · · · · · · · · · · · · · · · · · ·

Events tab

Events tab shows information about events in the process. Events have information like who canceled a process and when was cancelled:

HelpDesk Ticket Man	agement:_!_HelpDesk Tic	ket Manag	ement 06-20-11 05:52	2:59_!_2d80744c58f54	b58b03070a3dcb68e69_incident_0646afa5-!
Name	Sender	Status	Sent Date	End Date	
CreateProcessInstance	AGILEPOINT\Administrator	Processed	6/20/2011 5:52:59 PM	6/20/2011 5:53:00 PM	
CompleteWorkItem	AGILEPOINT\Administrator	Processed	6/20/2011 7:29:59 PM	6/20/2011 7:29:59 PM	
tollbackProcessInstance	AGILEPOINT\Administrator	Processed	6/28/2011 8:41:58 PM	6/28/2011 8:41:59 PM	





Data tab

This tab is available only for users that belong to Administrators role in AgilePoint.

The tab shows the names and values of the context variable of the process.

New values can be added (and current values can be changed) using the controls in the bottom of the tab to set the name and the value of the variables.

ame	Value	
_name	Apple	
rganizationname	AgileXRM	
_firstname	Mike	
punt	1	
_fullname	Mike Johnson	
serName	AGILEPOINT'Administrator	
xists	True	
ollbackMode	False	
_accountid	{1856C957-C9A8-E011-8DB4-000C299C86A3}	
uccess	True	
rrorMessage		
ubscriberUrl	http://localhost:8588/AgileDialogs/NotificationReceiver/NotificationReceiver.svc	
_fiulInamecontact	Marcos Perez	
_accesmode	0	
_businessunit	{8A50FECS-6697-E011-9589-000C299C86A3}	
clivitiesStack	768C838C1EE3456C8D906438343A48E8;	
ama	Value Set Variable Value	





Dialog Summary tab

When the process is an AgileDialog instance the tab *Dialog Summary* is presented. This tab shows a summary of the questions and answers set by the user while running the dialog:

deconor.	Value Variable	Selected Value	Display Varial
e: address (AgileScriptsDialogs.80)	value valuable	Selected Value	Display varia
Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book.	info		infod
Address Type	addresstype	Billing	addresstyped
Street name	street	Fim Street	streetd
Address 2	addressline2		addressline2c
n	number	1	numberd
Zip Code	zip	23445	zipd
City	city	Madrid	cityd
password	pwd	ENCRYPTED_BY_AGILEXRM:uesPk73edeku+QcsKDB/yA==	pwdd
confirm	confirmpassword	ENCRYPTED BY AGILEXRM:uesPk73edeku+OcsKDB/vA==	confirmpassw

3.1.6 Process Migration

This is the button used to Migrate a process instance:







To migrate a process the process must be *Suspended*.

This feature allows changing the process definition of a running process at runtime.

Processes can be migrated to previous or later versions.

This is the process migration screen:

	Migration Mappings	
۲	All Mappings Left Only Right Only Differences	
	•]	
2.	0	
		Select Target Version -
	i	
AGILEXKIM Help	Des	
Admit to plantic provides		
Ticket Evaluation		
	C Remove Mapping (0)	
	a contraction of the second se	
Submit Ticket - Tier 1 Review - Mo	are info?	
	Tree	
	Count link	
Add Note Add		
		OV Canad

The diagram on the left is the current process definition. The target version can be selected in the top right combo box:

All Mappings Left Only Right Only	Offerences
0	Select Target Version
AGILEXRM HelpDes	1.02
Ticket Evaluation	
Add Note	
	OK Cancel





When a target version is selected its corresponding diagram is presented on the right. For each equivalent activity between current and target version the tool automatically sets mappings (the numbers over each activity represent these mappings):



In this sample both Submit Ticket activities are detected as equivalent. As Tier 2 Review has no equivalent in current version, no mapping is added by default.

Mappings can be modified using Add Mappings and Remove Mappings buttons. To remove a mapping select the activity and click Remove Mapping:



To add a mapping select two no mapped activities and click Add Mapping.





Information about mapped is also presented in table mode:

		Migrati	ion Mappings			
		C All Happings) Left C	Jiny Kight Uniy	unterences		
		1 Submit Ticket	Equivalent	Submit Ticket	1	
		2 Tier 1 Review	Equivalent	Tier 1 Review	Select Target Version	1.03
A		3 More Info?	Equivalent	More Info?	EXRM	HelpDes
	Apility for Dynamic Business	4 Ticket Type	Equivalent	Ticket Type	r Dynamic Business	
	Ticket Evaluation	5 Additional Info	Equivalent	Additional Info	Evaluation	
		6 Product Defect	Equivalent	Product Defect		
		7 Accept Solution D	PialogEquivalent	Accept Solution Dialog		Ther 2 Pr
		Account 8 Manager Notification	Equivalent	Account Manager Notification		
•	Submit Ticket Iter 1 Review	9 Enhancement Rec	questEquivalent	Enhancement Request	Ticket	Hore Info?
	13 add Note	aditional Infr			Add Note	Additional Inf
			1.0	R.	04	,

When all mappings are done the process can be migrated to the target version just by clicking OK. After the process is migrated it can be resumed.







3.1.7 View Process Parent

When current process is a sub-process the button *View Parent* is enabled:



This button is used to open Process Manager with parent process in another window.





3.1.8 View More Processes

When the XRM record has several process instances associated this button is used to view the list of instances:



This button opens a list of associated processes:

lelpDesk Ticket Managemen	t 6/20/2011 5:47	:49 PM Running)
		OK	





Process Refresh Time Limit

Process Manager refreshes the information of the process automatically to show the user the latest information.

This refreshing is limited in time using a parameter in the Process Manager application configuration. When this limit is exceeded the process image is blurred to show the user that information could be out of date.

When this happens click *Refresh* button to start the count again:







4. Change activity behavior

There are several actions that can be performed over activities depending on user permissions and the type of the activity (manual or automatic).

4.1 Manual Activities



4.1.1 View Task

If the task is assigned to the current user, it can be opened using View Task link.

4.1.2 Cancel Task

The task can be cancelled from this screen if the user has permissions to cancel task for this process template.

4.1.3 Reassign task

Tasks can be reassigned at runtime using this feature:







This is the screen to select the user to assign the task to:

system Administrator	AGILEPOINT\Administrator

The task is reassigned to the selected user.

4.1.4 Change Due Date



To change the due date of a task this screen is used:

11/25/2010 15	1:38 PM 🔁 🕓
	OK Cancel
	OK Cancel

The task is changed to be due at the new date and time.





4.1.5 Create Linked WorkItem



This feature allows creating a new workitem (task) dynamically. The current activity will not be completed until all workitems included in it are completed. This is the screen to create a new task:

ate Linked WorkIte	em		23
arch Users (wildcard	allowed '*') *adm*	P	
ystem Administrator	AGILEPOINT\Administrator		
rk to Perform Revie	w the Case Duration 5	Hours + Busine	essTime 🖌

In this sample a new task will be assigned to System Administrator. This task will be called Review the Case and the user has 5 hours (business time, that is working time) to complete the task.





4.2 Automatic Activities



Automatic activities can be cancelled from Process Manager. When the activity is cancelled the process continues.

For Delay activities the due date can be changed like in manual tasks.

	Activity Information	
	Status Active, Pending	
	Started Date 11/18/2010 2:44:50 PM	
(B)	End Date	
	Due Date 11/18/2010 2:54:00 PM	
	Session 1	
Change Task	k Due Date	23
	11/25/2010 15 1:38 PM +	
_	OK Cancel	



