



**AGILEXRM**  
Agility for Dynamic Business

## PROCESS MANAGER USER GUIDE

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## Table of Contents

1.	Introduction	3
1.1	Disclaimer of warranty	3
2.	Opening AgileXRM Process Manager	4
3.	Process Manager Toolbox	6
3.1.1	Cancel a process instance	6
3.1.2	Suspend a process instance	7
3.1.3	Resume a process instance	7
3.1.4	Change process flow	8
3.1.5	View Process Details	10
3.1.6	Process Migration	14
3.1.7	View Process Parent	18
3.1.8	View More Processes	19
4.	Change activity behavior	21
4.1	Manual Activities	21
4.1.1	View Task	21
4.1.2	Cancel Task	21
4.1.3	Reassign task	21
4.1.4	Change Due Date	22
4.1.5	Create Linked WorkItem	23
4.2	Automatic Activities	24

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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.

### 1.1 Disclaimer of warranty

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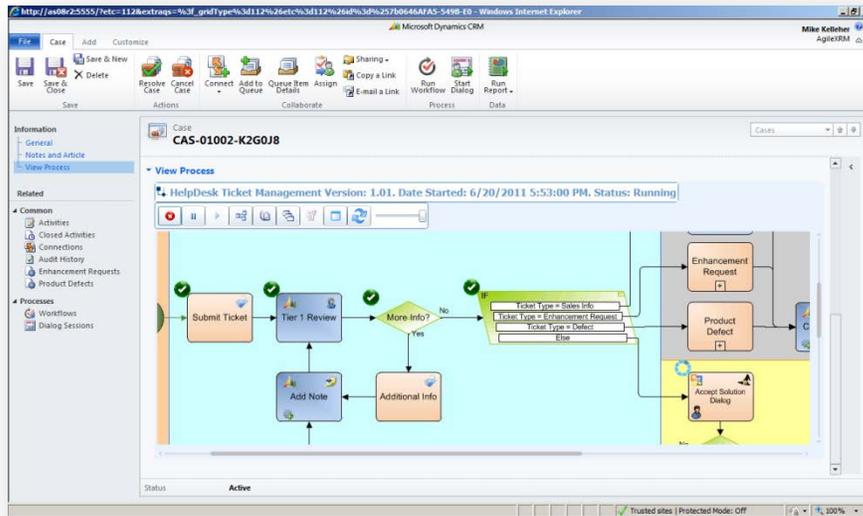
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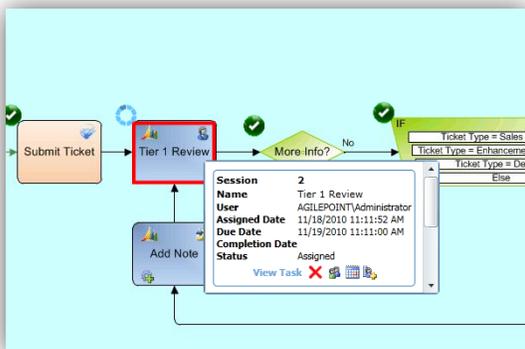
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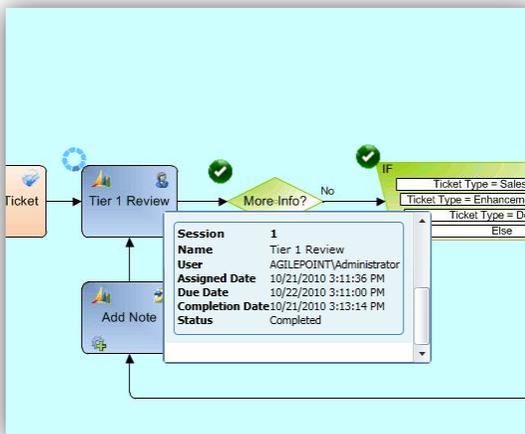
By default, the tab is hidden, when the user opens the tab, the Process Manager is opened:



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, assignment 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>/XRMPProcessViewer/RealTimeProcessManager.aspx?PIID=<ProcessInstanceID>

### 3. Process Manager Toolbox

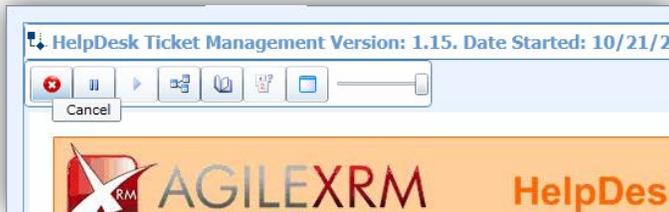
In the top of Process Manager available options are presented. These options are presented based on user permissions, so if the user has no permissions to perform an action the corresponding button is not presented. These permissions are configured from Envision and are stored in CRM.

Buttons in this toolbox are enabled or disabled based on process status.

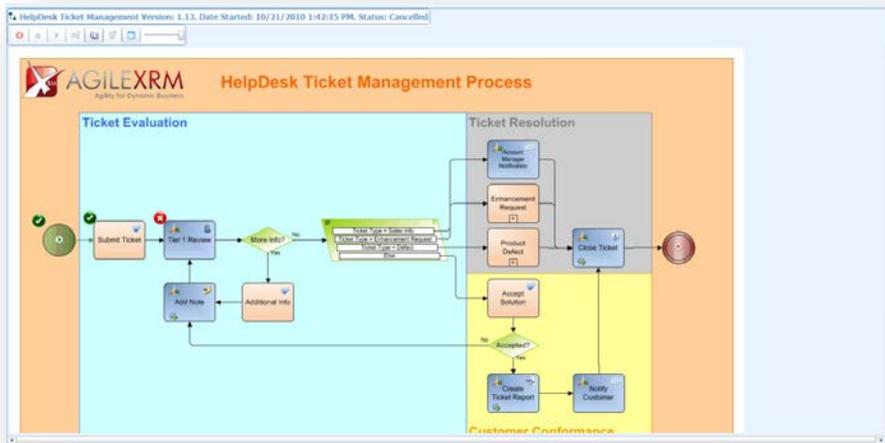


#### 3.1.1 Cancel a process instance

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.



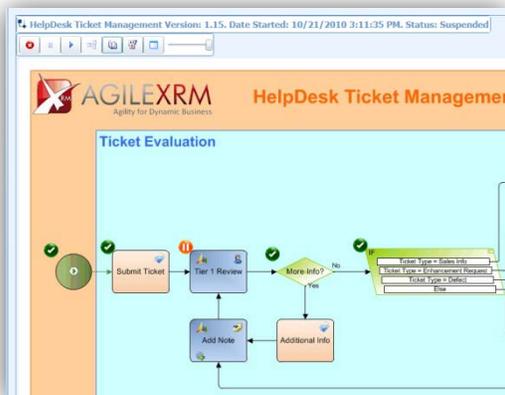
### 3.1.2 Suspend a process instance

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:



Users cannot complete activities in a suspended process.

### 3.1.3 Resume a process instance

This is the button used to Resume a process.

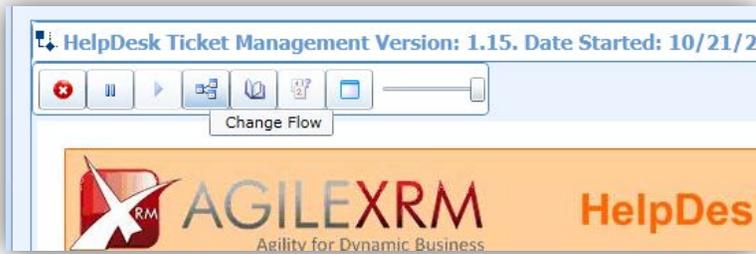


Only suspended processes can be resumed.

When a process is resumed user can completed its activities.

### 3.1.4 Change process flow

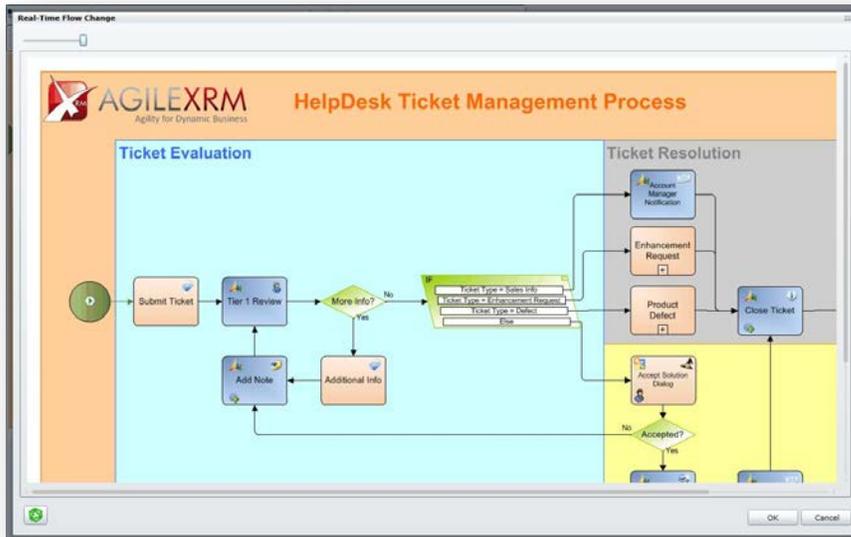
This is the button used to change the flow:



Flow change can be done only in running processes.

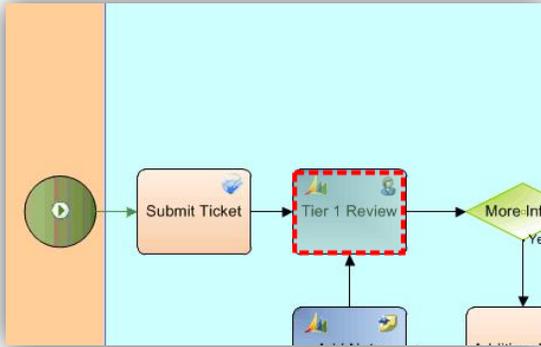
AgileXRM allows changing the process flow in real-time. This feature is useful in scenarios where some steps must be skipped or the user wants to go back in the process flow (for instance if there has been a mistake in previous steps).

When Change flow is clicked this window is opened:

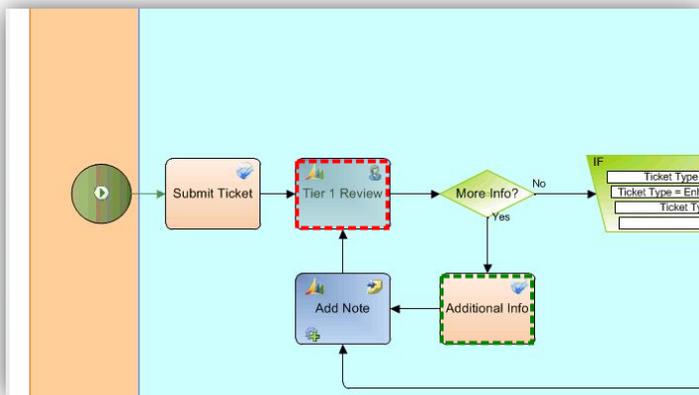


In order to change the flow, there must be one or more origin activities (activities that are active) and one or more destination activities. That means that flow can be split or joined using this feature.

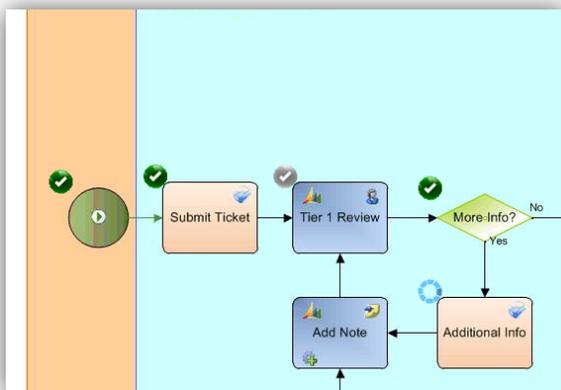
To select origin activities click on active activity or activities to select them. Active activities appear flashing in green in this screen. When an origin activity is selected its shape is rounded by a red square:



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

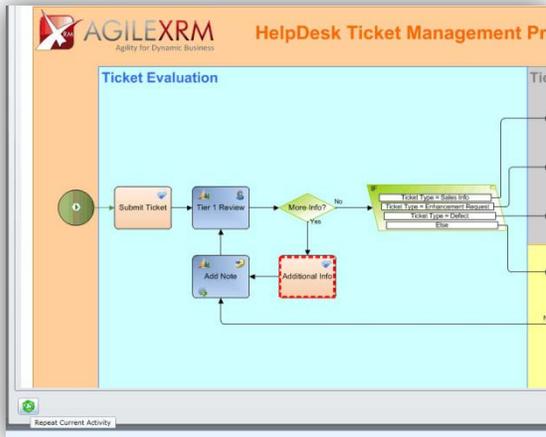


In this sample the process will be moved from Tier 1 Review to Additional Info. When the change is accepted (click ok button) Tier 1 Review will be cancelled and a new task will be created in Additional Info activity.



Process flow can be changed to go forward or backward.

Change flow screen allows repeating an active activity:



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

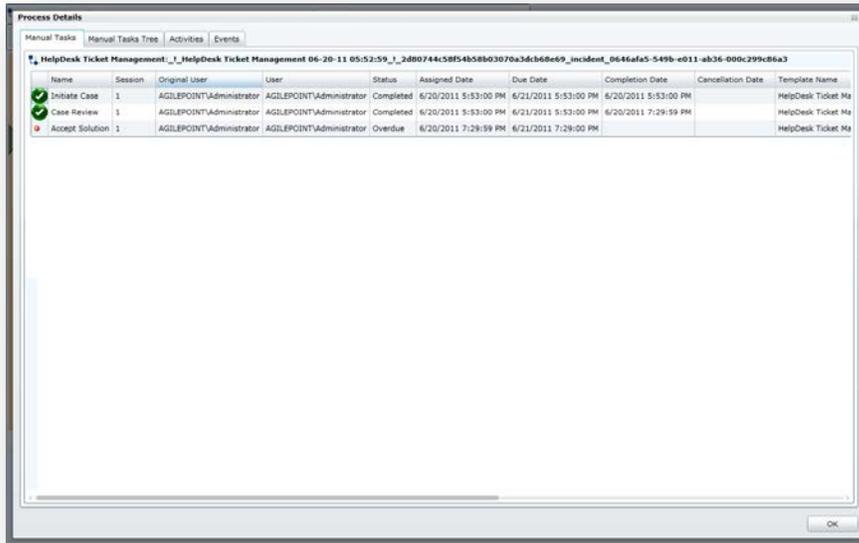
### 3.1.5 View Process Details

This is the button used to view process details:



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

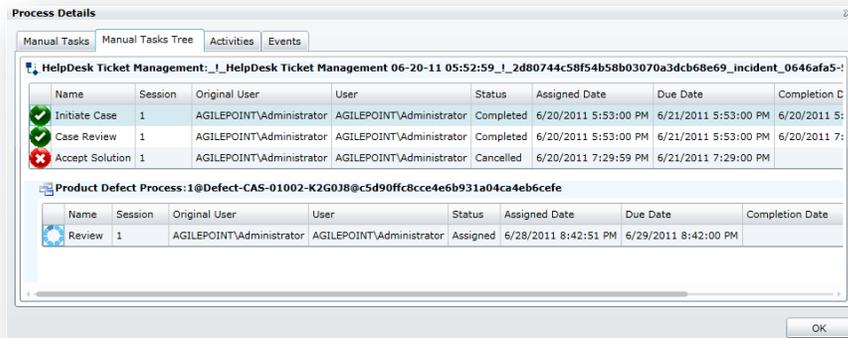
## Manual Tasks tab



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:



## Activities tab

Activities tab shows information about all activities:

Name	Session	Status	Start Date	Completion Date
START	1	Passed	6/20/2011 5:53:00 PM	6/20/2011 5:53:00 PM
Submit Ticket	1	Passed	6/20/2011 5:53:00 PM	6/20/2011 5:53:00 PM
Tier 1 Review	1	Passed	6/20/2011 5:53:00 PM	6/20/2011 7:29:59 PM
More Info?	1	Passed	6/20/2011 7:29:59 PM	6/20/2011 7:29:59 PM
Ticket Type	1	Passed	6/20/2011 7:29:59 PM	6/20/2011 7:29:59 PM
Accept Solution Dialog	1	Activated	6/20/2011 7:29:59 PM	
Product Defect	1	Active	6/28/2011 8:42:33 PM	
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:

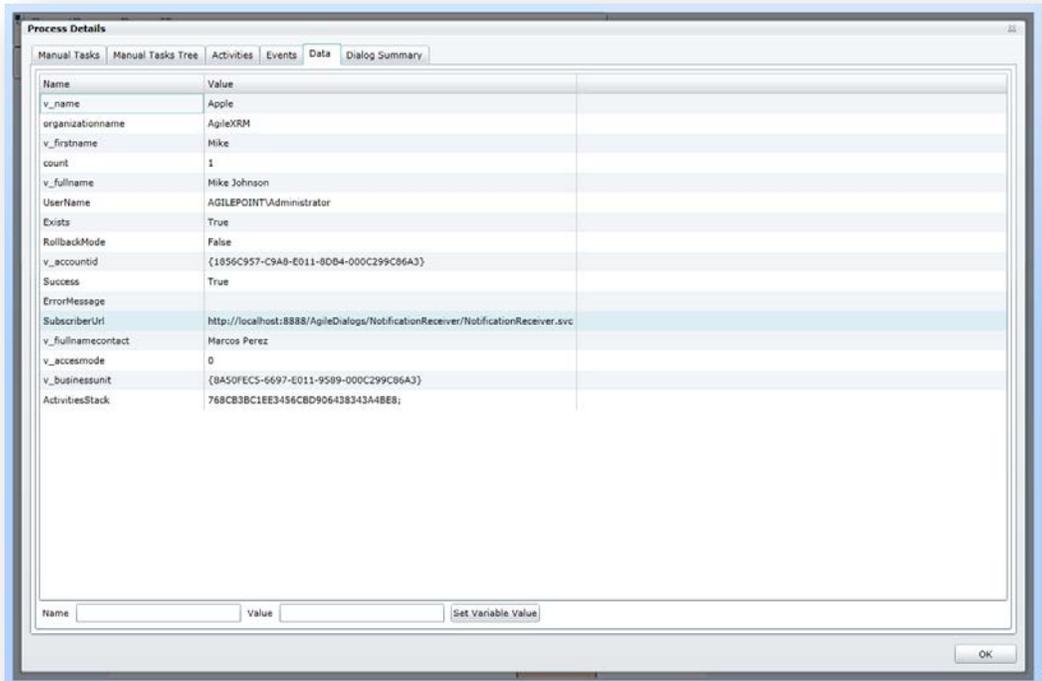
Name	Sender	Status	Sent Date	End Date
CreateProcessInstance	AGILEPOINT\Administrator	Processed	6/20/2011 5:52:59 PM	6/20/2011 5:53:00 PM
CompleteWorkItem	AGILEPOINT\Administrator	Processed	6/20/2011 7:29:59 PM	6/20/2011 7:29:59 PM
RollbackProcessInstance	AGILEPOINT\Administrator	Processed	6/28/2011 8:41:58 PM	6/28/2011 8:41:59 PM

**Data tab**

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

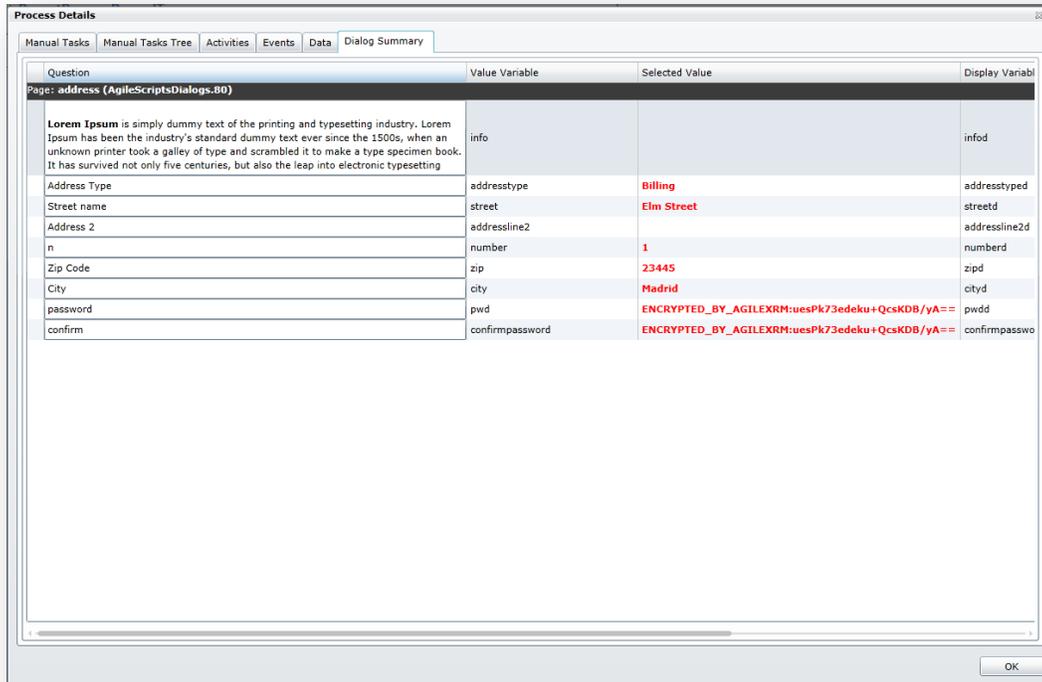
The tab shows the names and values of the context variable of the process.

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.



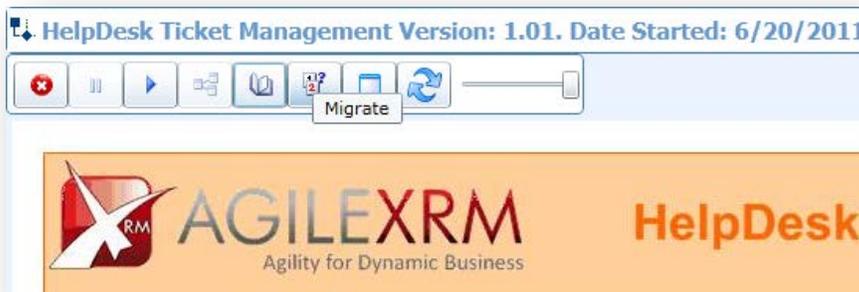
### Dialog Summary tab

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:



### 3.1.6 Process Migration

This is the button used to Migrate a process instance:

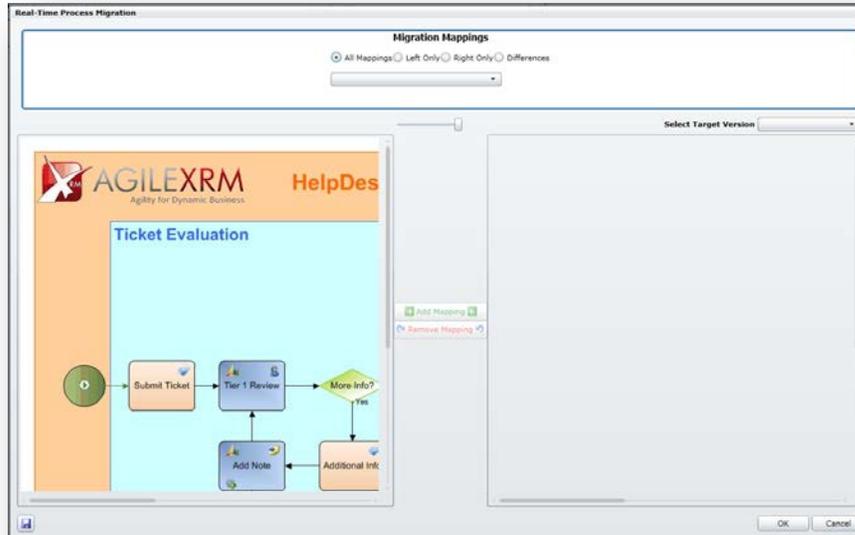


**To migrate a process the process must be *Suspended*.**

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

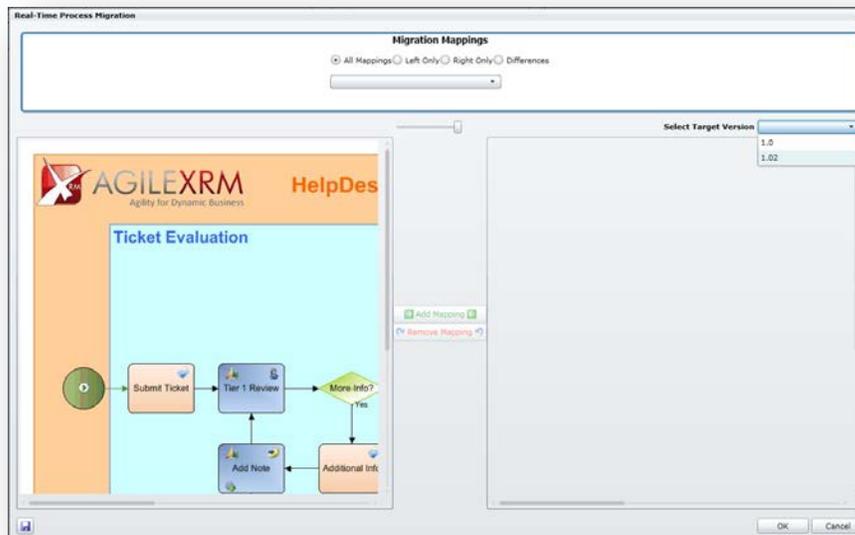
Processes can be migrated to previous or later versions.

This is the process migration screen:

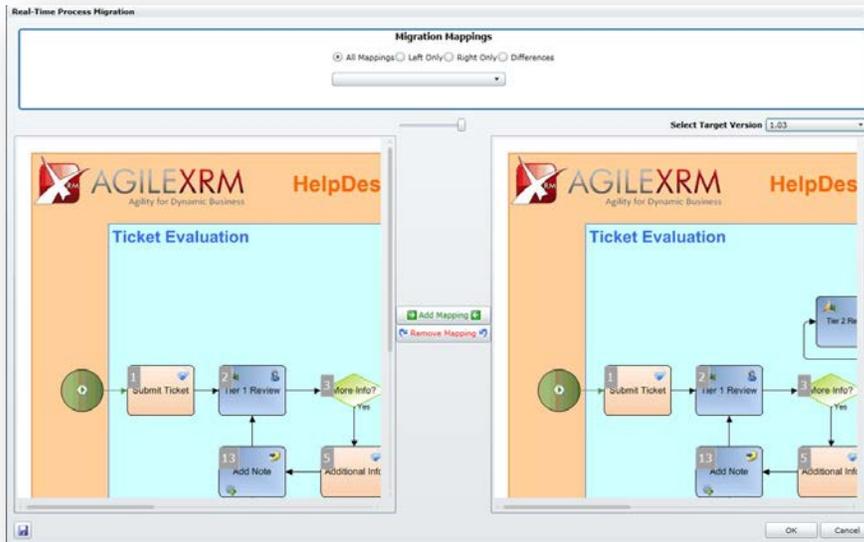


The diagram on the left is the current process definition.

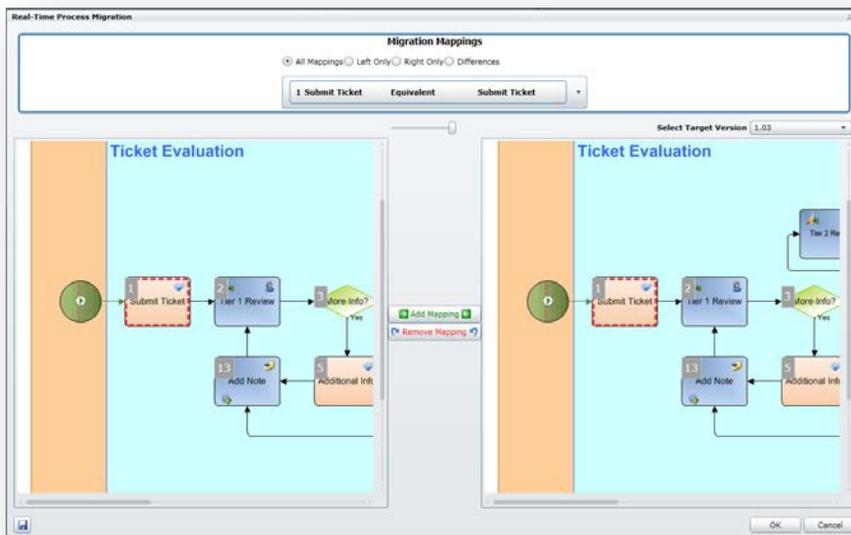
The target version can be selected in the top right combo box:



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):

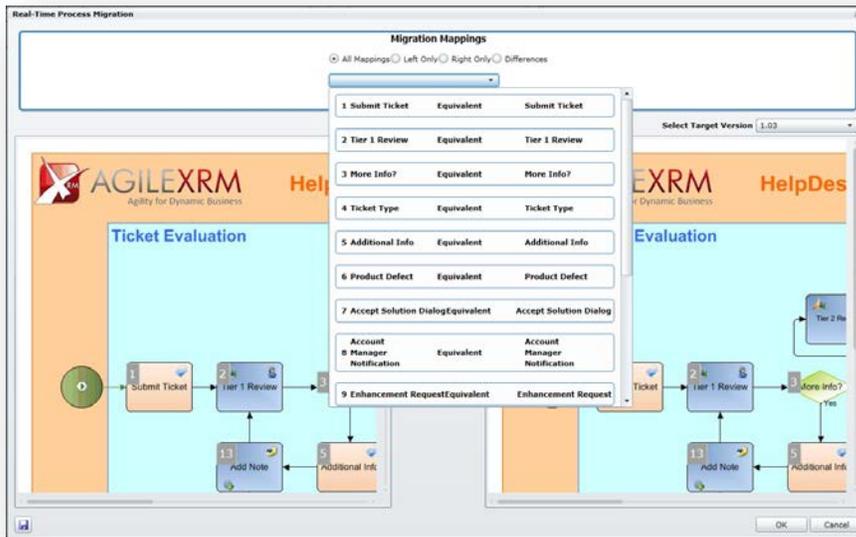


In this sample both Submit Ticket activities are detected as equivalent. As Tier 2 Review has no equivalent in current version, no mapping is added by default. Mappings can be modified using Add Mappings and Remove Mappings buttons. To remove a mapping select the activity and click Remove Mapping:

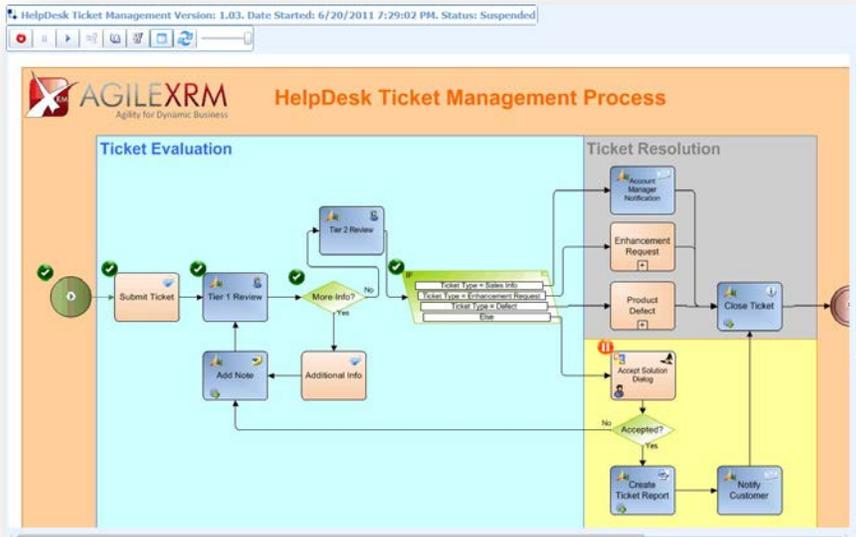


To add a mapping select two no mapped activities and click Add Mapping.

Information about mapped is also presented in table mode:

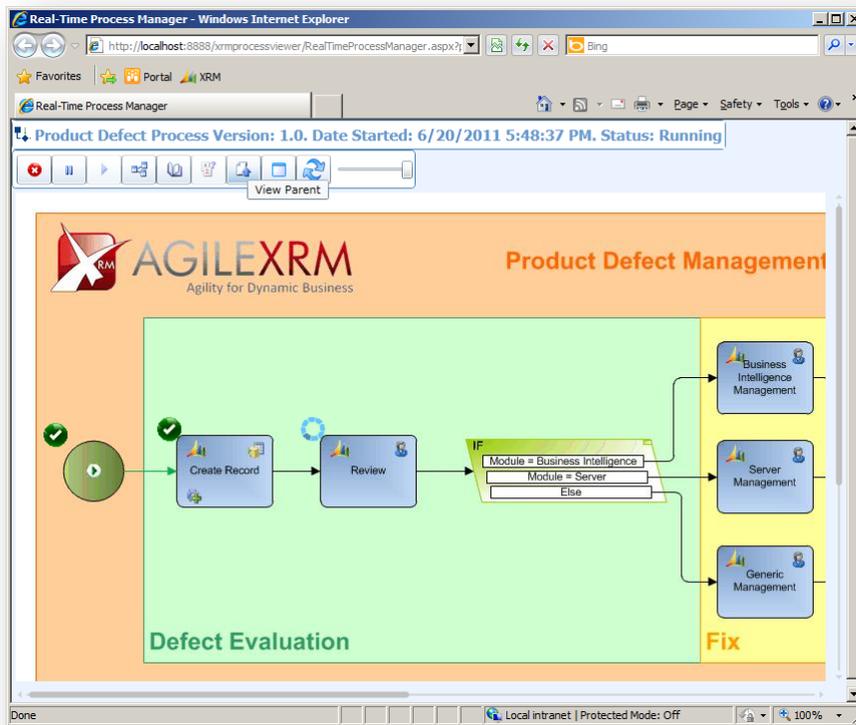


When all mappings are done the process can be migrated to the target version just by clicking OK. After the process is migrated it can be resumed.



### 3.1.7 View Process Parent

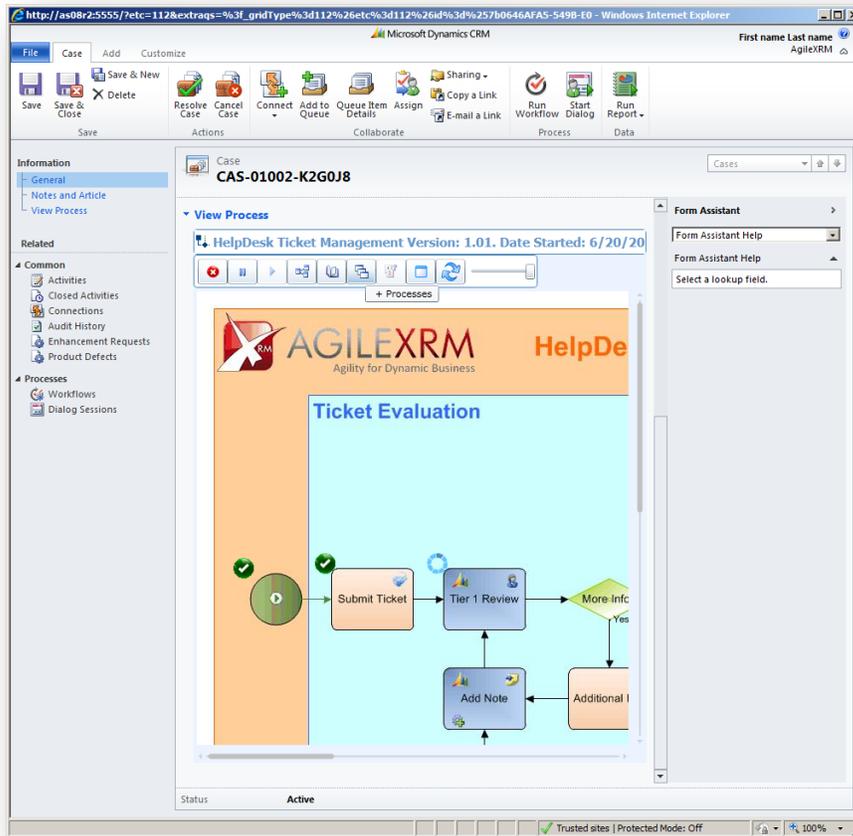
When current process is a sub-process the button *View Parent* is enabled:



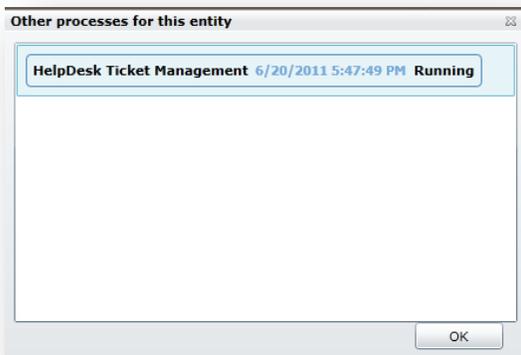
This button is used to open Process Manager with parent process in another window.

### 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:

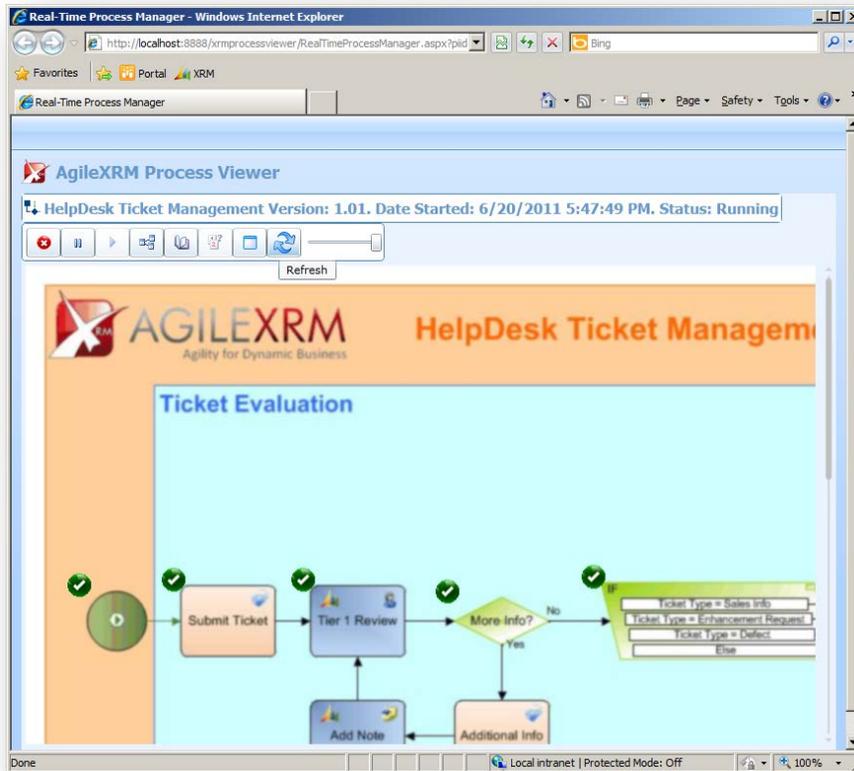


## Process Refresh Time Limit

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.

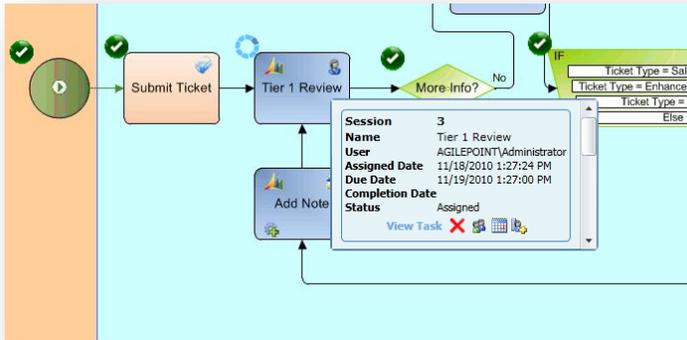
When this happens click *Refresh* button to start the count again:



## 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

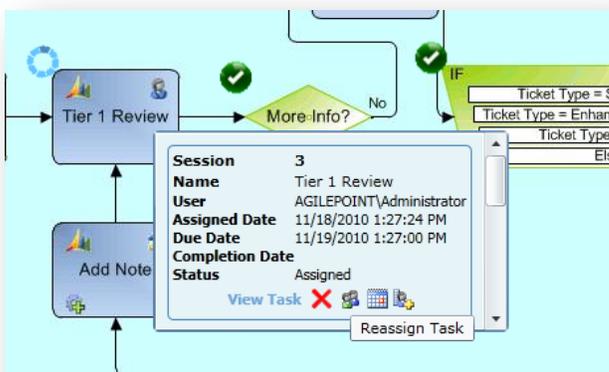
If the task is assigned to the current user, it can be opened using View Task link.

#### 4.1.2 Cancel Task

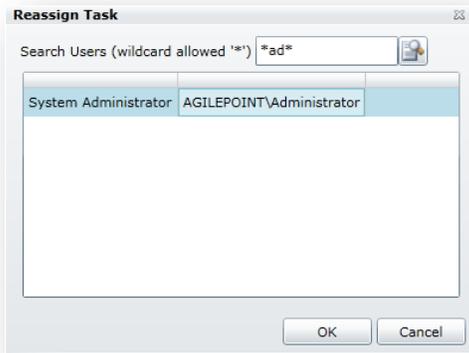
The task can be cancelled from this screen if the user has permissions to cancel task for this process template.

#### 4.1.3 Reassign task

Tasks can be reassigned at runtime using this feature:

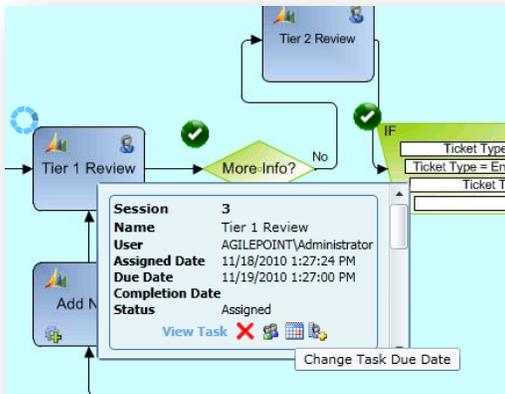


This is the screen to select the user to assign the task to:

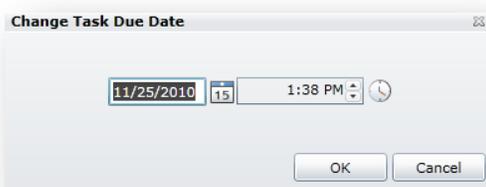


The task is reassigned to the selected user.

#### 4.1.4 Change Due Date

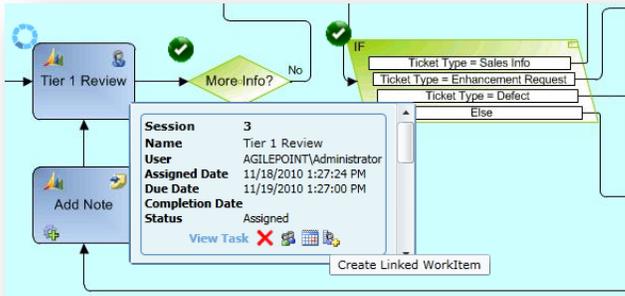


To change the due date of a task this screen is used:

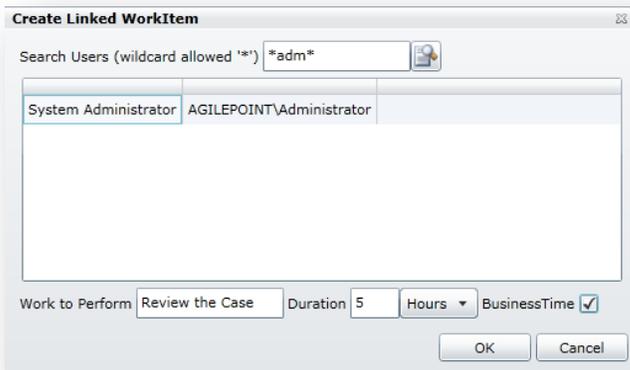


The task is changed to be due at the new date and time.

### 4.1.5 Create Linked WorkItem

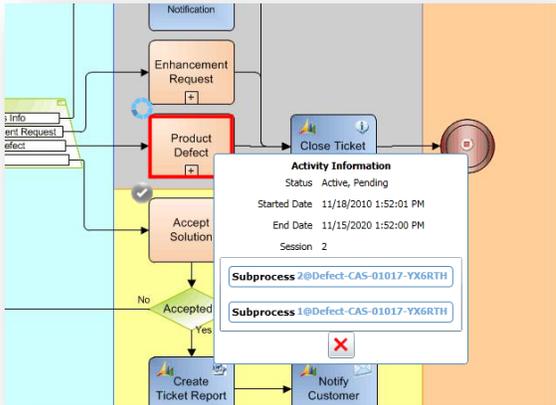


This feature allows creating a new workitem (task) dynamically. The current activity will not be completed until all workitems included in it are completed. This is the screen to create a new task:



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.

