iGrafx® 2015

Process Automation User Guide

iGrafx® 2015 Process Automation User Guide

© 2014 iGrafx, LLC. All rights reserved.

iGrafx® FlowCharter™ 2015, iGrafx® Process™ 2015, iGrafx® Process™ 2015 for Six Sigma, iGrafx® Process™ 2015 for Enterprise Modeling™, iGrafx® Process™ 2015 for SAP®, Process Central®, iGrafx Process Automation™, iGrafx® Performance Central™, Enterprise Central®, Enterprise Modeler®, Enterprise Modeler® for SAP®, iGrafx® Gateway for SAP® Solution Manager. The software mentioned above is the property of iGrafx, LLC and its licensors and is protected by copyright. Any reproduction in whole or in part is strictly prohibited. iGrafx, Swimlane, iGrafx FlowCharter, iGrafx IDEF0, iGrafx Process, iGrafx Process Central, iGrafx Enterprise Central and iGrafx Enterprise Modeler are trademarks or registered trademarks of iGrafx, LLC and/or its subsidiaries in the U.S. and/or other countries.

Adobe® PDF is a registered trademark of Adobe Systems Incorporated in the United States and/or other countries.

iGrafx provides certain modeling and diagram objects in support of and based on the LEAD Reference Framework.

Microsoft, Word, Excel, PowerPoint and SQL Server® are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

SAP®, the SAP logo and SAP® Solution Manager are registered trademarks of SAP AG in Germany and in several other countries.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

MINITAB® and all other trademarks and logos for the Company's products and services are the exclusive property of Minitab Inc. All other marks referenced remain the property of their respective owners. See minitab.com for more information.

JMP is a registered trademark of SAS Institute Inc. in the USA and a trademark in all other countries.

Six Sigma is a trademark of Motorola, Inc.

SQL Server 2012 © Copyright 2012, Microsoft Corporation. All rights reserved.

All other product, font and company names and logos are trademarks or registered trademarks of their respective companies.

Revision: Dec. 2014

Contents

Logging In **5**
Types of Registration 6
ToDo Clients **8**
ToDo Client 9
ToDo Client 1G 12
Differences Between the ToDo Client and ToDo Client 1G 13
Tasks **14**
Setting Up Absences and Hand-overs 15
Schedule All Absences 16
Create Absence Rules 17
Assigned Tasks 18
Ad-hoc Tasks 19
Accepting Tasks 19
Adding Notes 20
New Note 21
Setting Tasks as Read/Unread 22
Completing Tasks 23
In the Properties Tab 23
In the Smartform Tab 23

In the Task List 24
From a Context Menu 24
Confirming Task Completion 24
Smartform Tab 25
Properties Tab 25
Documents Tab 26
Note Tab 26
Links Tab 26
Efforts (Expenses) Tab 27
Creating an Effort (Expense) 28
Live Process View Model Tab 29

Logging In

The Process Automation Login dialog box (see Figure 1 below) requires three values that you must specify:

- **Login** – There are three ways to enter the login credentials; see Types of Registration on the next page.
- **Password** – Your assigned password.
- **Client** – Specifies which of the various clients you wish to log in to. The set of clients available to you depends on your specific user permissions.

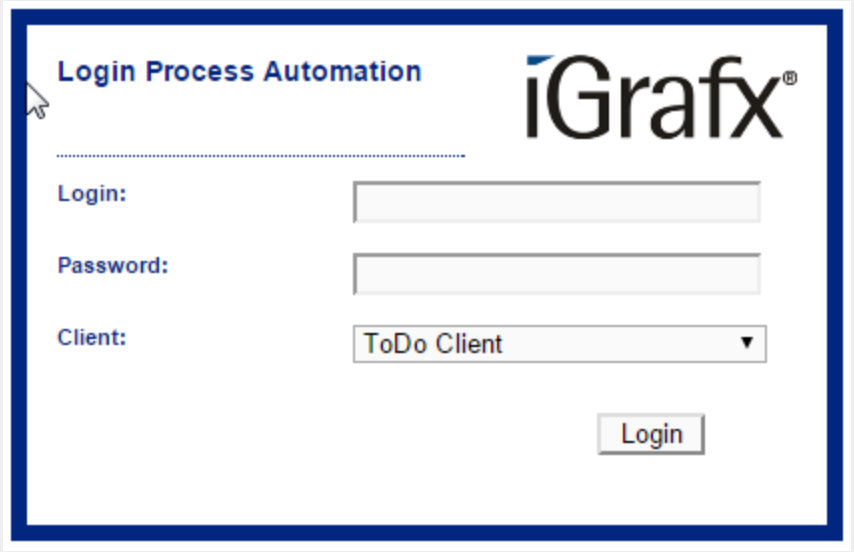

Figure 1. iGrafx Process Automation Login dialog box

Options available in the Client drop-down list include the following:

- ToDo Client
- ToDo Client 1G
- Process Manager Client
- Process Manager Client 4G
- Process Monitoring Client
- Administration

Types of Registration

There are three ways to log in to iGrafx Process Automation. Not all may be supported by your organization's implementation.

When you have supplied the required values, click the **Login** button. The Process Automation dashboard, at the URL http://*your_internal_server/* opens in your browser.

Log in with client and user name

You can also log in with your iGrafx Process Automation username and a client prefix. This way, iGrafx Process Automation knows which client you want to log in to. The client and username must be specified as follows:

client/name

The *name* value must be the one specified in your client profile by your organization's iGrafx Process Automation administrator.

Log in with username

If you log in using just your username and password, you'll be logged in to the iGrafx Process Automation client that is specified as the default client in the tim.properties file in the JBoss directory.

Log in with your email address

Each user can be registered with the email address in their user profile when the associated password is correct.

> **Note:** The email address specified for you in iGrafx Process Automation must be your system-wide email address.

ToDo Clients

iGrafx Process Automation includes five different web clients that you can log in to:

- ToDo Client
- ToDo Client 1G
- Process Manager Client 4G
- Process Manager Client (2G)
- Process Monitoring Client
- Administration

Your permissions settings determine your access to the individual clients. The two ToDo clients require "member" permissions.

Note: The Process Manager and Process Monitor clients are described in the *iGrafx® 2015 Process Automation Manager Guide*.

The Administration client is described in the *iGrafx® 2015 Process Automation Administrator Guide*

ToDo Client

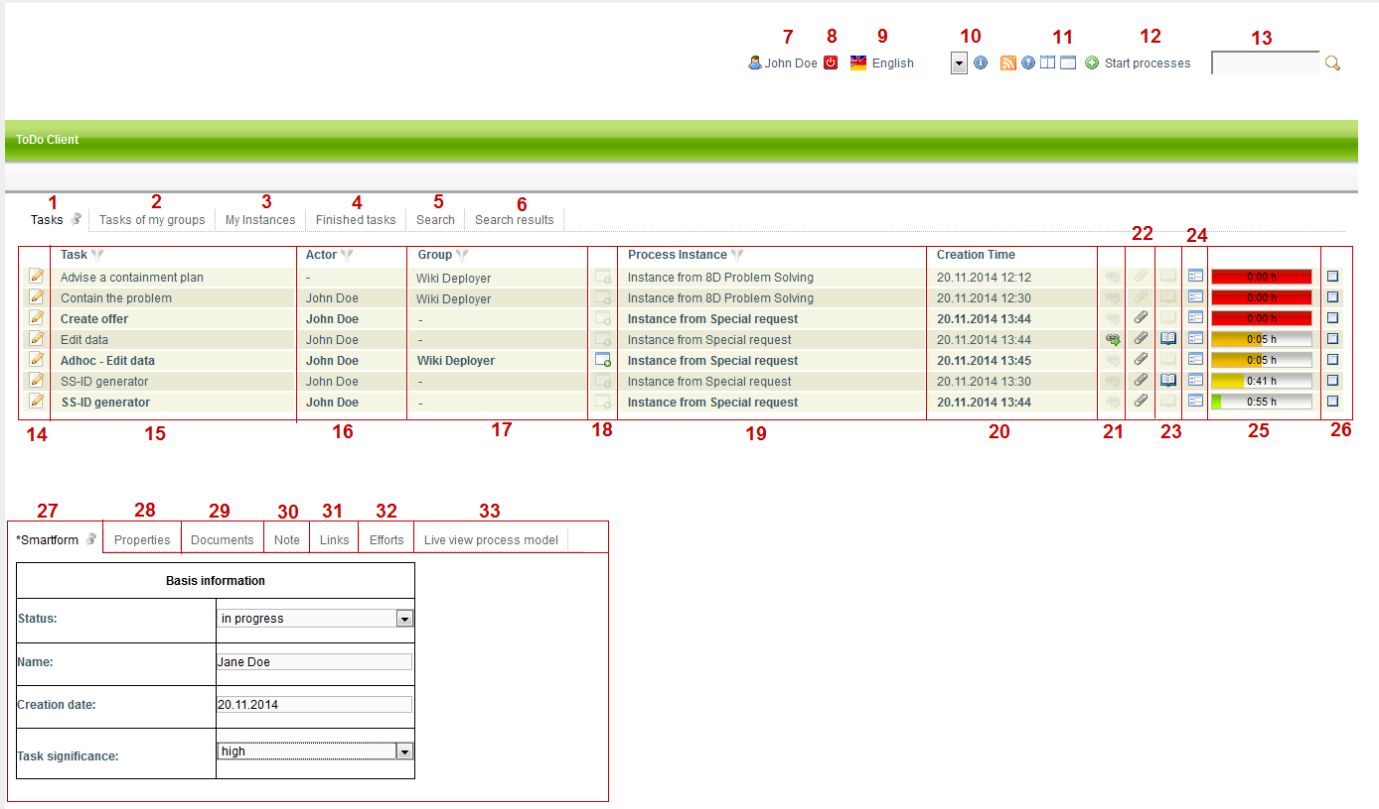

Figure 2. ToDo Client features

The ToDo Client elements listed in Figure 2 on the previous page are described in the following table:

Element	Description
1	This tab lists all tasks assigned to you, as well as those assigned to your groups that have no assigned actor.
2	This tab lists all tasks that have been assigned to one of your groups.
3	This tab lists all instances you have initiated.
4	This tab lists all tasks that you have completed. Your client-profile can be configured to show finished tasks of your groups as well.
5	In this tab you can, via the Smartform of a specific process definition, look for process variables by entering the appropriate parameters. The results are displayed on the Search results tab (element 6). **Note:** Does not work in ToDo Client 1G.
6	This tab lists the instances returned by he search. (See elements 5 and 13.)
7	By clicking on your username, you can access your user settings.
8	Click this button to log off.
9	This drop-down list lets you choose an alternate language.
10	This drop-down button lets you see the current version and revision, which you can use in case of an error.
11	Using these symbols, you can switch between the ToDo-Client 1G and the ToDo-Client.
12	From here, you can initiate process instances, provided you have the necessary permissions and are an initiator in the process.
13	This box lets you search in all process definitions and their process instances. Results are displayed in the search results tab(element 6).
14	Click on this symbol to access the properties of the associated task.
15	The name/description of the task.
16	The current actor responsible for this task.
17	If the task is assigned to a group, it will be displayed in this column.
18	This symbol indicates whether or not the task is an ad-hoc task. If so, the symbol is highlighted with color.

Element	Description
19	This column shows the process-instance to which the task belongs.
20	This column lists the creation time of the task.
21	Click this symbol to open a list of links that have been assigned to the task.
22	Click this symbol to open a list of documents that are uploaded or can be.
23	Click this symbol to add a note or view existing notes.
24	Click this symbol to open the smart form for this process in a separate window.
25	Indicates how much time remains until the task must be finished. A registered process time is required for displaying this value.
26	Check this check box to mark a completed task as finished. A confirmation prompt will appear. You can check off multiple tasks by holding the Ctrl key while clicking.
27	If a process instance is selected, the relevant smart form appears on this tab, and can be edited before the task is marked as finished.
28–32	These tabs display the properties, documents, notes, links, and efforts associated with the current task.
33	This tab displays a model of the current process for the selected task, showing the currently-active task.

ToDo Client 1G

The ToDo Client 1G, also known as the full-screen ToDo client, is a smaller version of the normal ToDo client, Its available functions correspond with those of the ToDo Clients, except for

- The smartform preview in the bottom area
- The Live view process-model

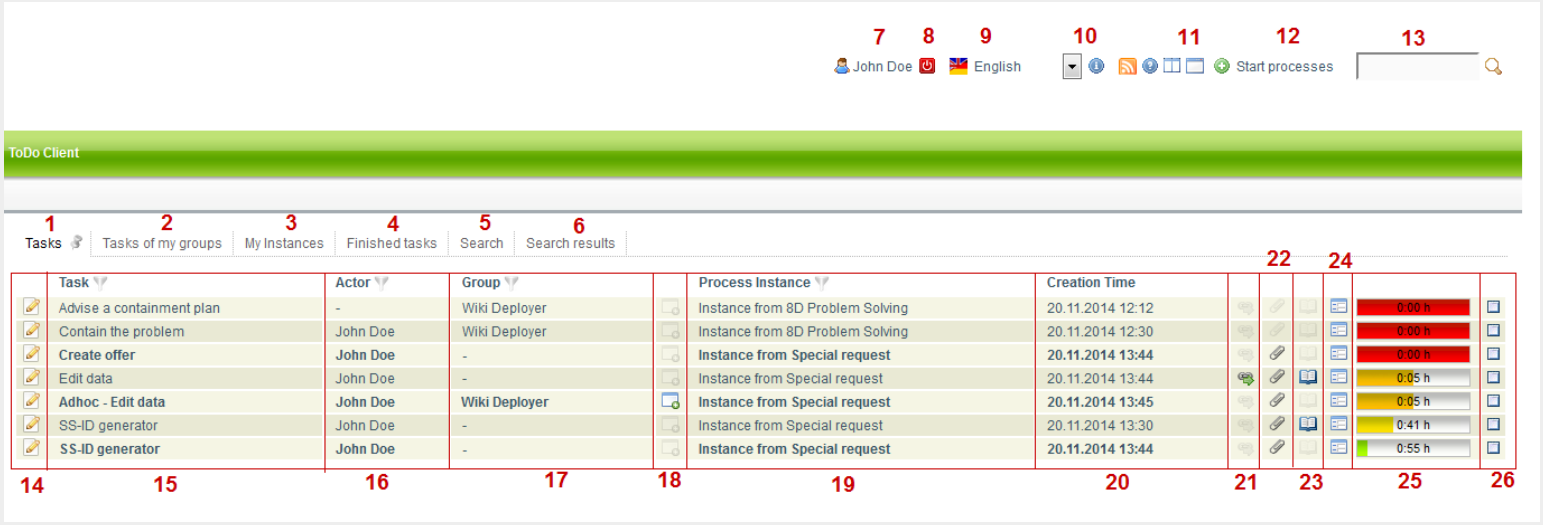

Figure 3. ToDo Client 1G

Differences Between the ToDo Client and ToDo Client 1G

The ToDo Client 1G displays a single widget, which displays Results, Tasks of My Groups, My Instances, Completed Tasks, and Find.

In the ToDo client, two widgets are displayed. The one in the top is designed exactly like the widget of the ToDo-client 1G. The bottom one additionally offers a preview of the smartform and a live view of the process model. In the ToDo client, you can also see a preview of the corresponding smartform and a live view of the process model in the widget under it. You can choose between these two previews by switching the selected tab.

Tasks

A task is the subunit of an activity. Each activity consists of one or more tasks. An activity is not complete unless all of its component tasks are complete.

An object is a concrete step that must be performed by an employee before you can start the next process step.

Tasks have a name, a description, a direct allocation (if necessary), and can include links.

The task allocation determines which user will complete the task.

Figure 4. Task list

Element	Description
1	Click to open the task properties tab.
2	The task name.
3	The Actor, or person who will complete the task.
4	The group to which the task is assigned, if present.

5	Icons in this column indicate an AdHoc task.
6	Icons in this column access any links attached to the task.
7	Icons in this column access any documents attached to a task.
8	Icons in this column access any notes attached to a task.
9	Icons in this column open any smartform attached to the task.
10	Clicking the check boxes in this column marks the associated task as finished.

Setting Up Absences and Hand-overs

To make sure your process tasks are complete and accurate, be sure that absence scheduling and hand-over rules are in place for all users in the group.

Schedule All Absences

Every user needs to ensure that all planned absences are scheduled in their user profile.

To do this, click your username at the top of the ToDo client page. In the resulting User window, click the Absence tab, then the Create Absence button.

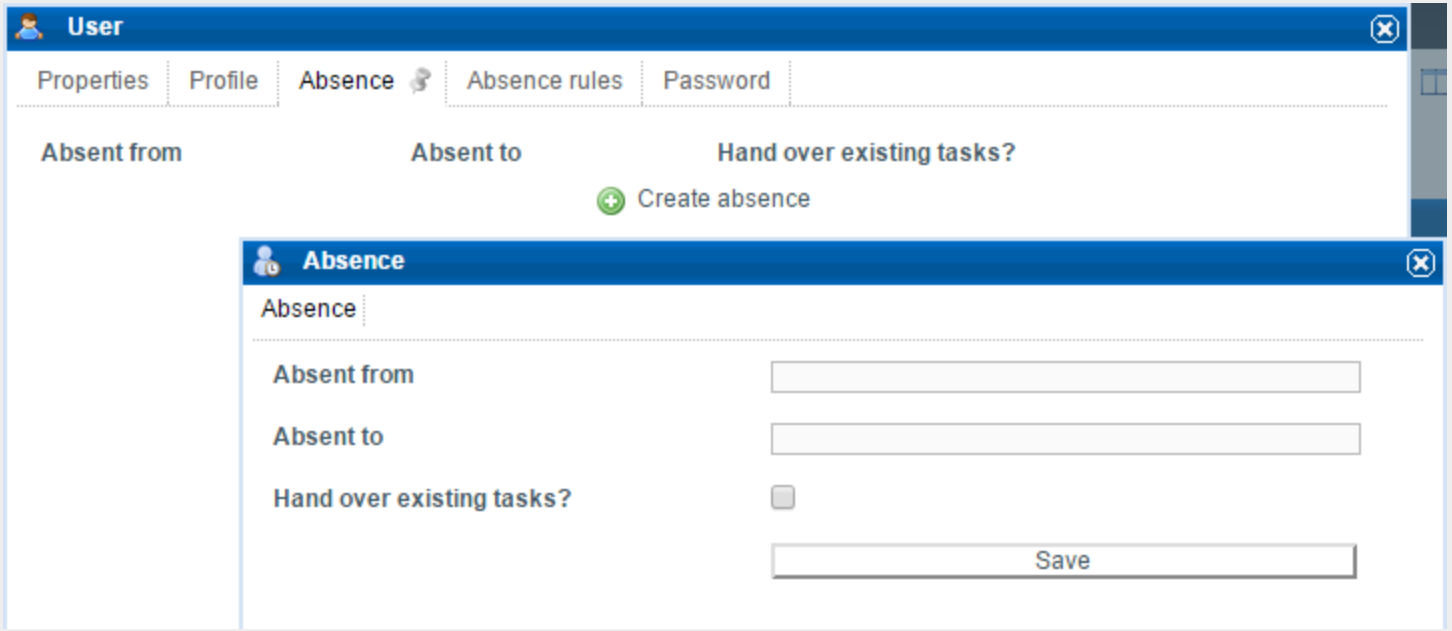

Figure 5. Absence dialog box

To keep the process moving smoothly, all users should make sure to schedule their planned absences, and if possible, hand over existing tasks to other group members.

Create Absence Rules

To specify other group members that can perform your tasks in your absence, set up an absence rule.

To do this, click your username at the top of the ToDo client page. In the resulting User window, click the Absence rules tab, then the Create absence rule button.

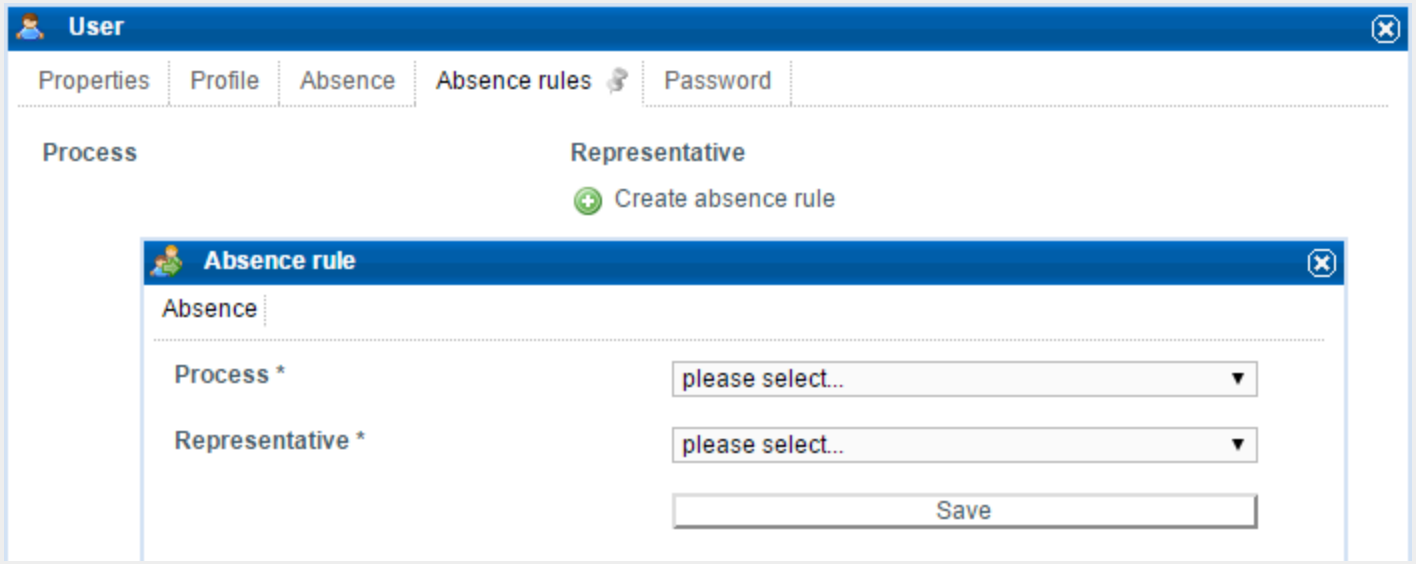

Figure 6. Absence rule dialog box

In this dialog box, you can specify another coworker as the "Representative" to whom Process Automation will hand over tasks in your absence for a specific process. You can only specify one representative per process.

Assigned Tasks

A task can be assigned directly to either a user or group. If a task is assigned to a user, that user must complete the assigned task.

If the task is assigned to a group, a member of this group must complete the task. A user can assign the group task to themselves in the Properties tab before starting to work on the task, to ensure that no task is done twice. If that user leaves work (has a scheduled absence) before he or she can complete the task, then the task is reassigned to the entire group.

Task assignments can be made explicitly, within activity shapes in the process diagram in the iGrafx client, or implicitly, to the resources defined in the pool/department/swimlane.

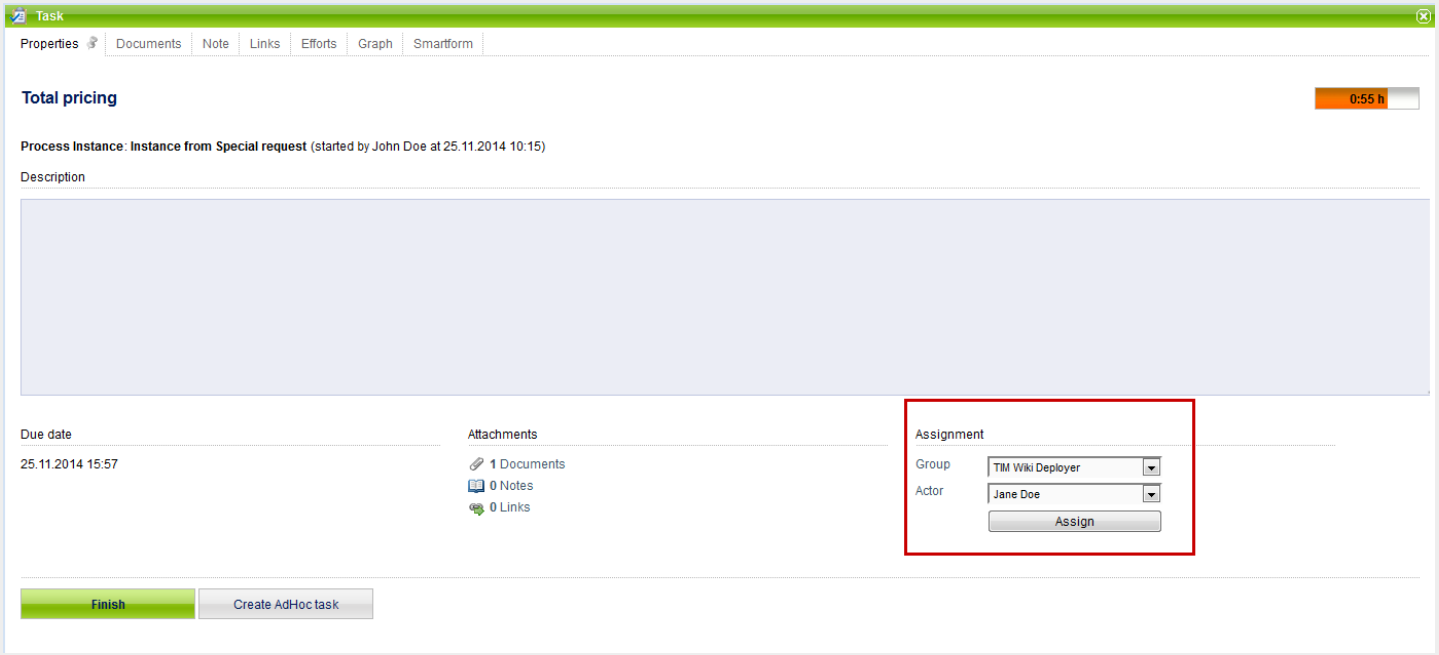

Figure 7. Task Assignment controls in the Task Properties tab

Ad-hoc Tasks

An ad-hoc task can be created dynamically whenever there is work to be done that is not associated with an existing task. Such a task could be needed if an employee finds while carrying out an existing task that more activity is required before the process can be considered compete.

You can create an ad-hoc task on the properties tab of an existing task, by clicking the Create AdHoc task button. When you do that, new fields appear in the Properties tab that let you specify a description of the task and assign it to a group and an individual,

Ad-hoc tasks are added to the task list with the other tasks, have "Adhoc" in their task names, and appear with a special Adhoc icon.

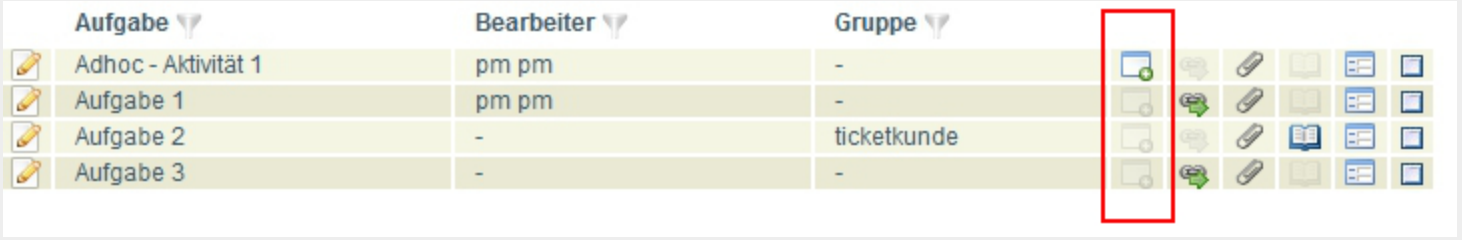

Figure 8. Ad-hoc task

Accepting Tasks

If a task is assigned to a group, a user in this group can accept the task. This ensures that the user is registered as the agent, or actor, of the task, and that it will not appear in the task lists of other users, preventing more than one user from working on the same task.

Adding Notes

In the Notes tab, you can provide notes that can be viewed by the other users in the group.

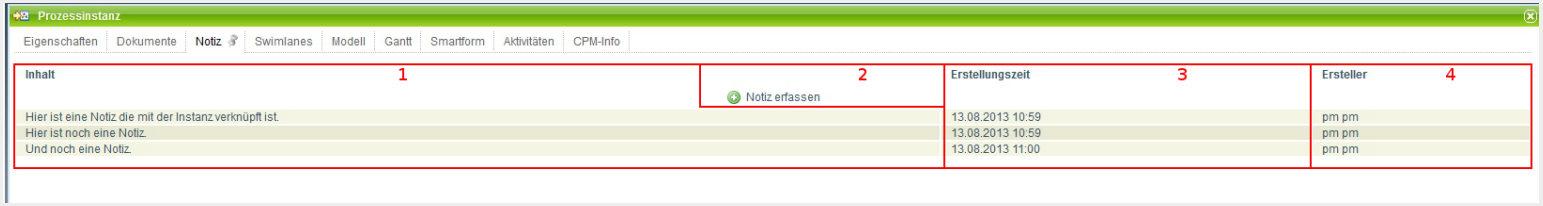

Figure 9. Process instance Notes tab

Element	Description
1	The note contents, visible at a glance.
2	Click this button to add a note.
3	The time the note was created.
4	The user that added the note.

New Note

You can attach new notes by clicking the Create note button in the Notes tab, and typing in the resulting Note dialog box

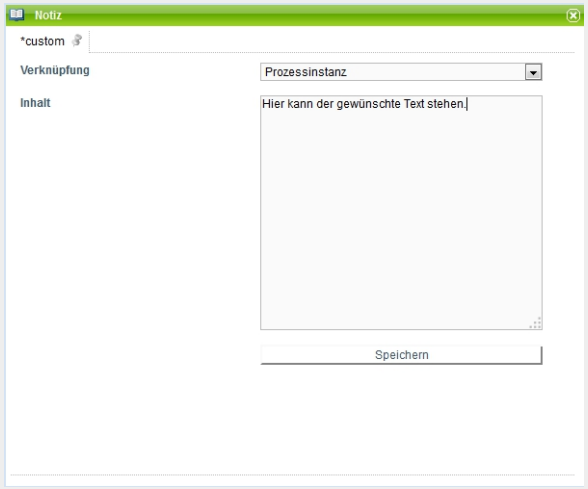

Figure 10. Note dialog box

Be sure to click the Save button to save the note.

Setting Tasks as Read/Unread

For tasks that are still unread, or never have been clicked, the task name appears in bold.

Figure 11. Unread tasks

Once a task is has been clicked on, it is considered to be read and the name appears in regular type.

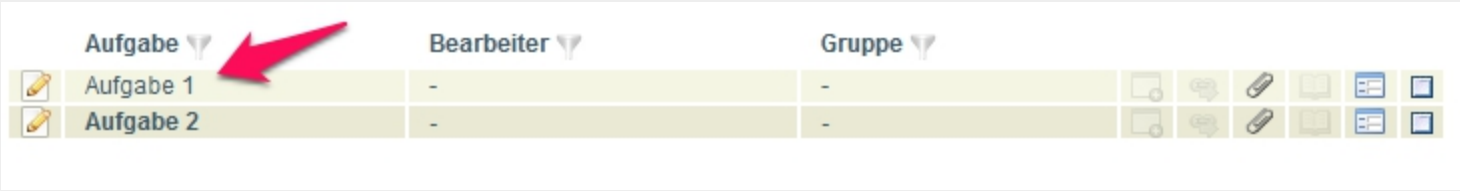

Figure 12. Read tasks

You can change the read/unread status of a task by right clicking on it and choosing Set read/unread from the resulting context menu.

Completing Tasks

Once you have finished working on, you must mark it as finished so that the process can continue. A task can be completed in the clients in four different ways.

In the Properties Tab

In properties of the task, click the Finish button to complete the task.

In the Smartform Tab

If the task involves putting information in the smartform, you can complete the task from the Smartform tab by clicking the Save form and finish task button.

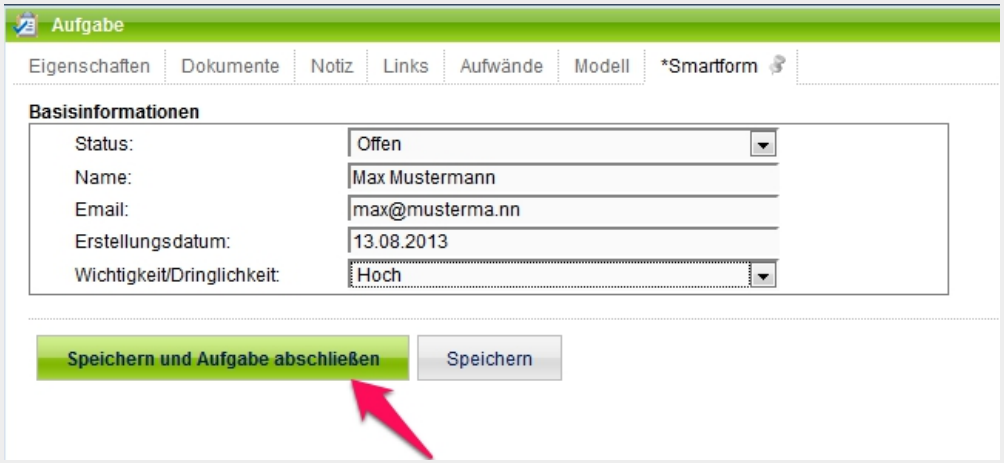

Figure 13. Closing a task in a smart form

In the Task List

You can mark one or more tasks as completed directly in the task list by checking the check box at the far left. Hold down the Ctrl key while clicking to complete multiple tasks.

Figure 14. Closing a task in the task list

From a Context Menu

You can finish any task in the task list by right-clicking on it and selecting Finish from the resulting menu.

Confirming Task Completion

Before a task is marked as complete, a confirmation dialog appears. Click OK to confirm that the task is finished.

Smartform Tab

In this tab you will find the Smart Form, ready for editing as required by the task. Click the Save form and finish task button at the bottom of the tab if completing the form completes the task.

Properties Tab

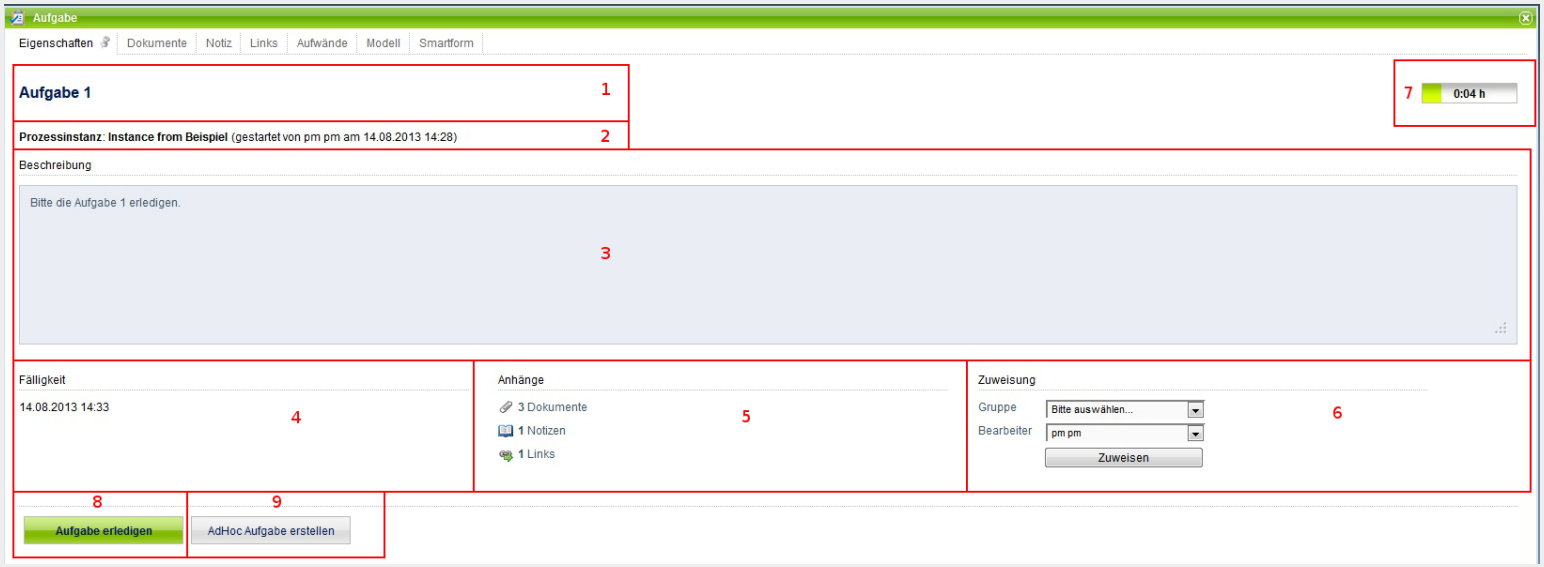

Figure 15. Task features

Element	Description
1	Name of the task.
2	The related process instance, including start time.

3	A description of the task, from the process model diagram created in the iGrafx client.
4	The due date for the task.
5	Overview of the information (documents, notes, links) attached to the task.
6	Controls for assigning or reassigning the task.
7	The elapsed time since the beginning of the task.
8	The Finish button.
9	The Create an AdHoc task button.

Documents Tab

On this tab you can upload documents or view already-attached ones.

Note Tab

You can view or add notes on the task on this tab.

Links Tab

In this tab you see any links that were attached to the task in the process model. A name and URL can be provided for each link.

Figure 16. Links tab

Efforts (Expenses) Tab

On this tab, you can record the cost or time required to complete the task.

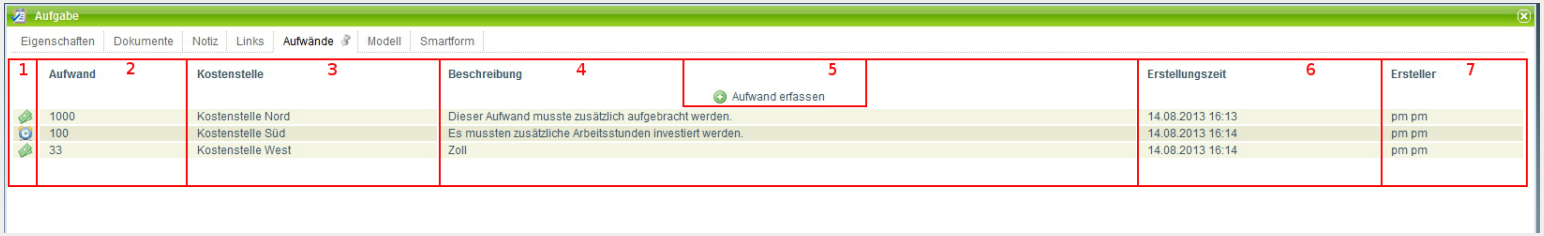

Figure 17. Expenses tab

Element	Description
1	Symbol that indicates whether the unit is cost or time.
2	How many units were estimated, in either currency or minutes.
3	Indicates the responsible cost center.
4	Displays a detailed description of the expense.
5	Click this button to add effort/expense data.
6	The time at which the costs were created.
7	The user who added the effort information.

Creating an Effort (Expense)

To add effort/expense details, click the Register effort button in the Efforts tab. The Efforts dialog box appears.

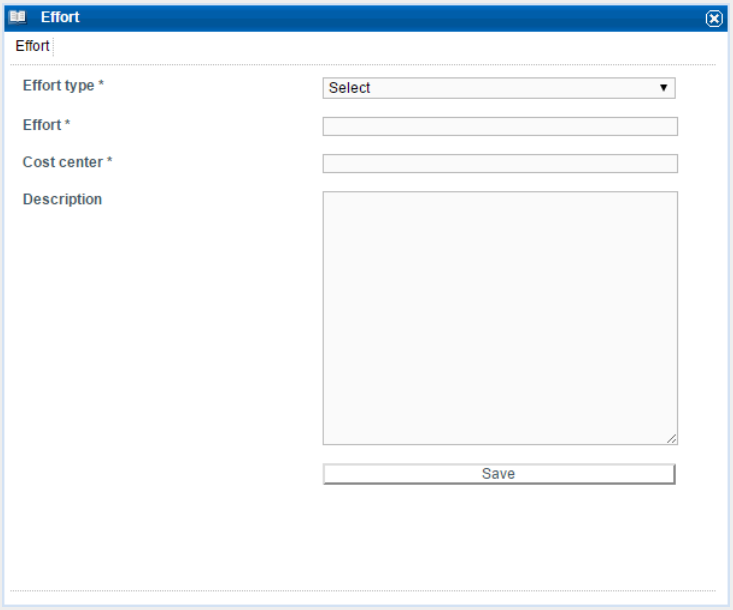

Figure 18. Efforts (expense) dialog box

Field	Description
Effort type	Specifies whether this effort is a cost or time.
Effort	Specifies the quantity of the effort (cost = currency, time = minutes).
Cost center	Specify the relevant cost center here.
Description	Enter a free-form description of the effort expense here.

Live Process View Model Tab

This tab displays a diagram of the process model. The activity currently in progress is highlighted.

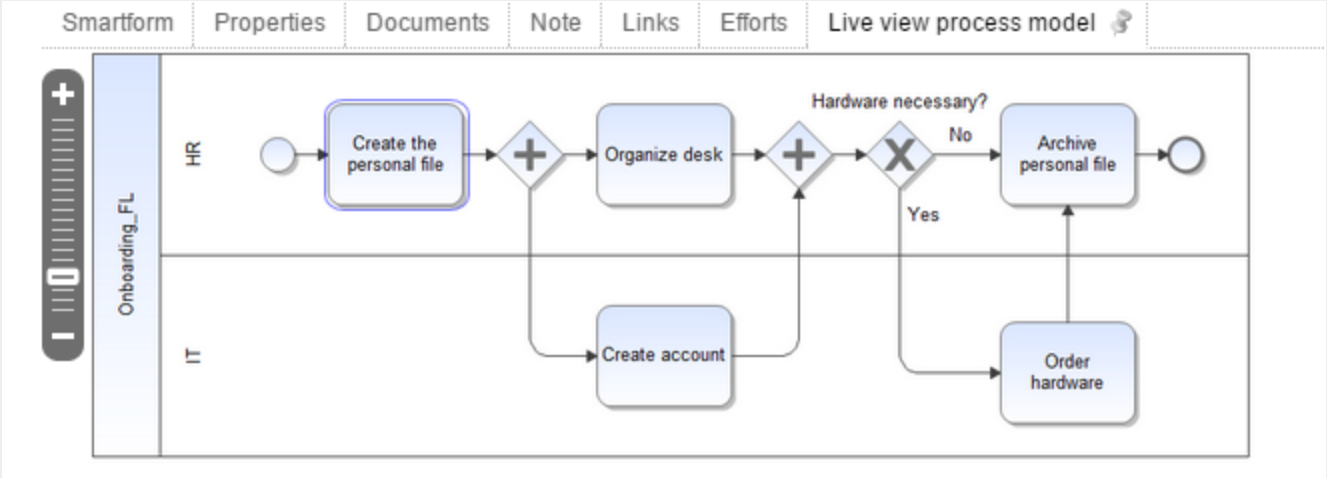

Figure 19. Process model with activity in progress highlighted