

PLATFORM DEEP DIVE / Plugins /

Custom Plugins /

Task management



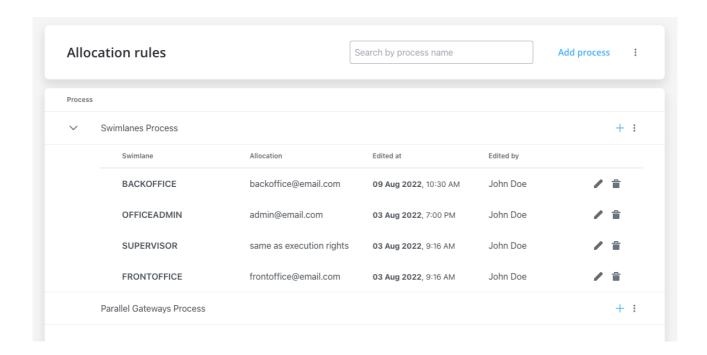
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PLATFORM DEEP DIVE / Plugins / W Custom Plugins / W Task management / Using allocation rules

Allocation rules are meant to define when tasks should be auto-assigned to users when they reach a swimlane that has a specific role configured (for example, specific tasks will be assigned for the *front office* and specific tasks for the *back office* only).





(!) INFO

Tasks will always be allocated depending on the users load (number of tasks) from current/other processes. If there are two or more users with the same number of assigned tasks, the task will be randomly assigned to one of them.

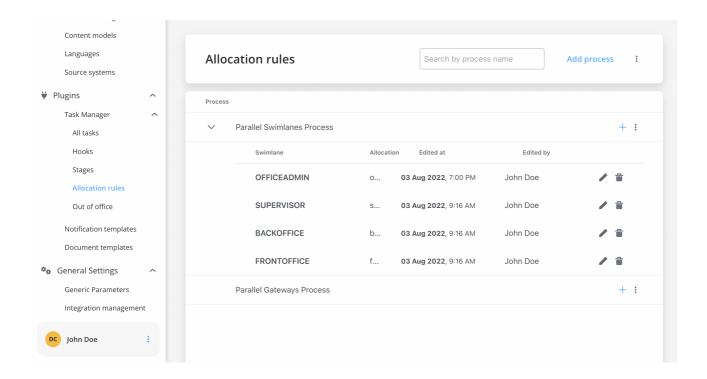
Accessing allocation rules

To access the allocation rules, follow the next steps:

- 1. Open
 - The fallback content to display on prerendering
- 2. From the side menu, under **Task Management**, select the **Allocation rules** entry.

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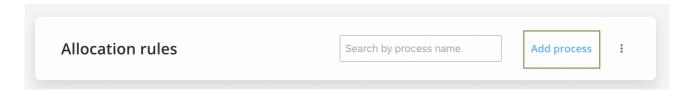




Adding process and allocation rules

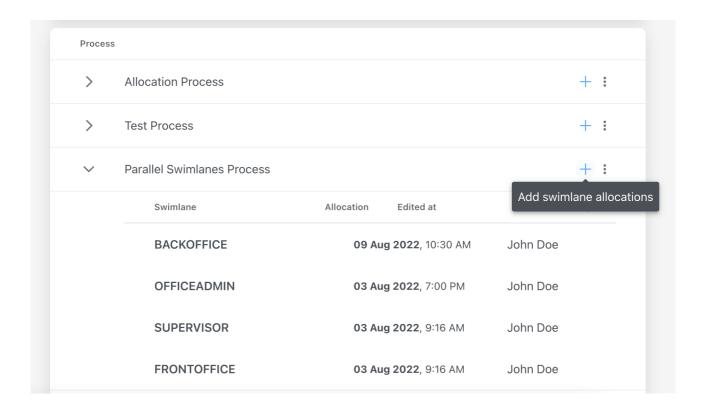
To add process and allocation rules, follow the next steps:

1. Click **Add process** button, in the top-right corner. More details on how to create/configure a process are here.



- 2. Select a process definition from the drop-down list.
- 3. Click Add swimlane allocations button (+) to add allocations.



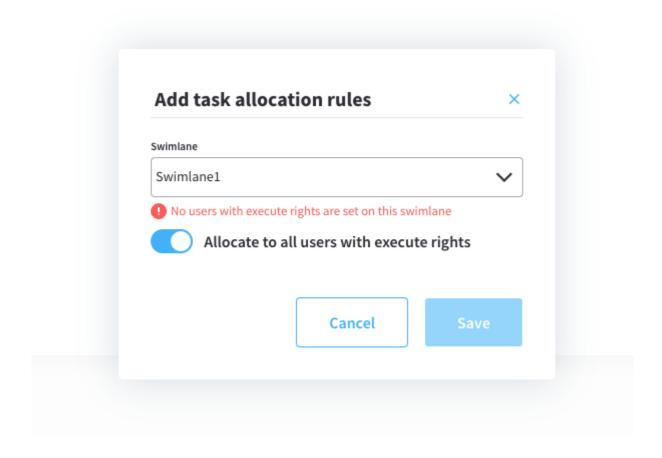




A CAUTION

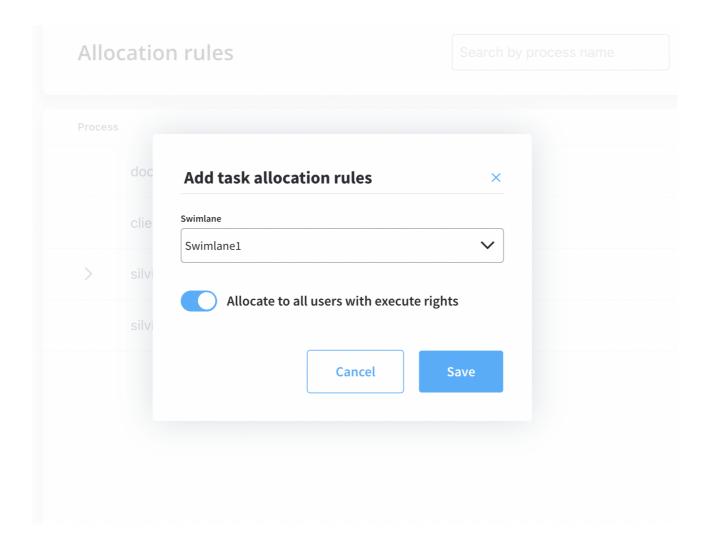
NOTE! If there are no users with execute rights in the swimlane you want to add (hasExecute: false), the following error message will be displayed:





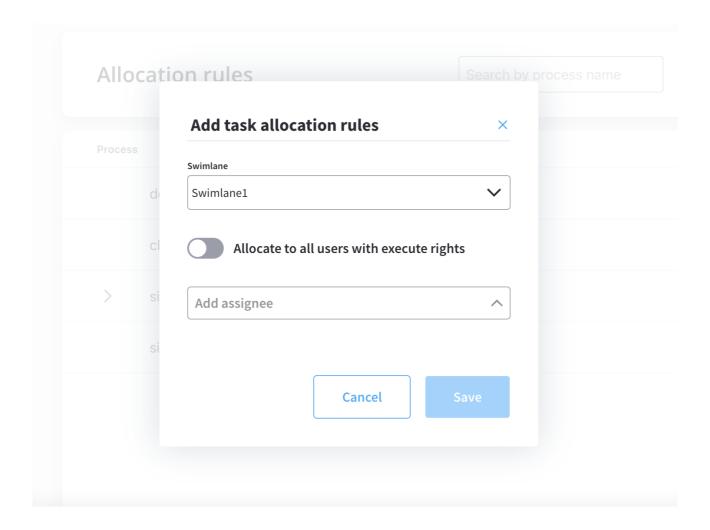
4. **Option 1**: Allocate all users with execute rights.





5. **Option 2**: Allocate only users you choose from the drop-down list. You can use the search function to filter users by name.





6. Click Save.

(!) INFO

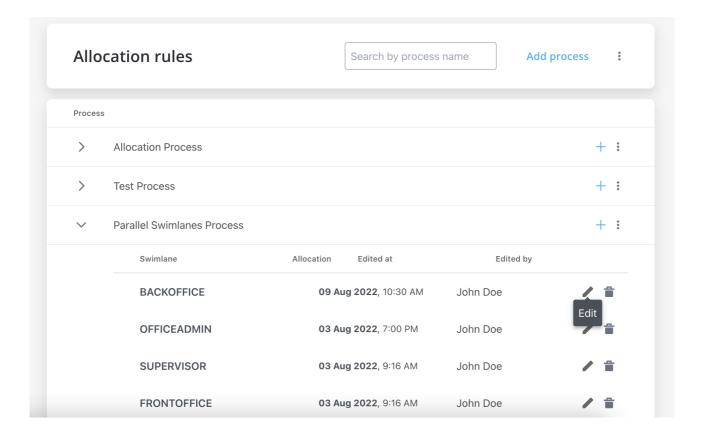
Users with out-of-office status will be skipped by automatic allocation. More information about out-of-office feature, here.

Editing allocation rules

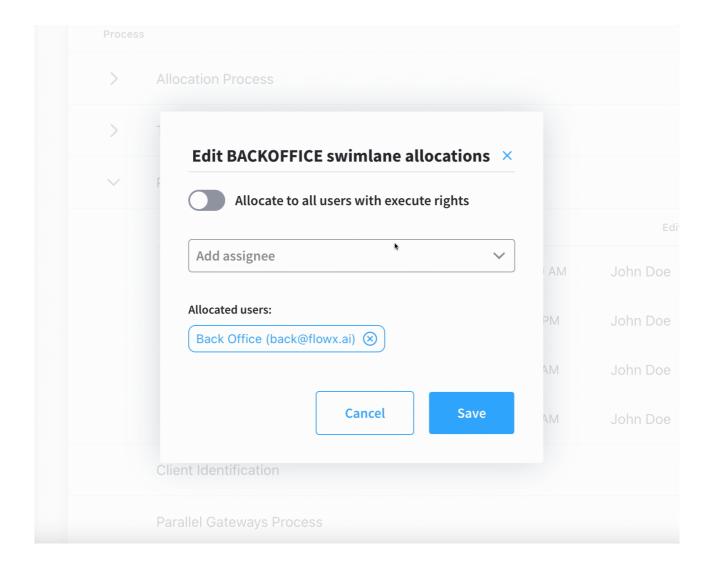
To edit allocation rules, follow the next steps:



1. Click Edit button.



2. Change the allocation method.



3. Click Save.

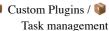
Viewing allocation rules

The allocation rules list displays all the configured swimlanes grouped by process:

- 1. Process the process definition name where the swimlanes were configured
- 2. Swimlane the name of the swimlane
- 3. Allocation applied allocation rules
- 4. Edited at the last time when an allocation was edited

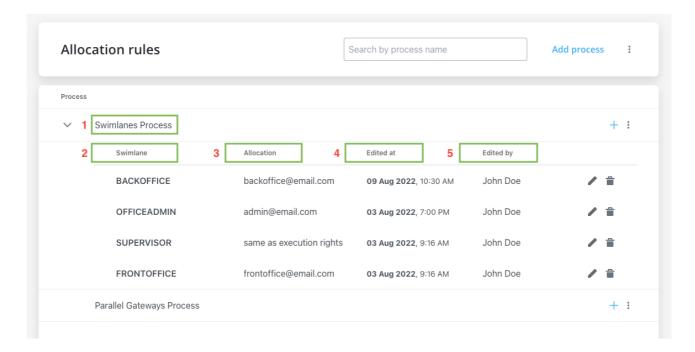








5. Edited by - the user who edited/created the allocation rules

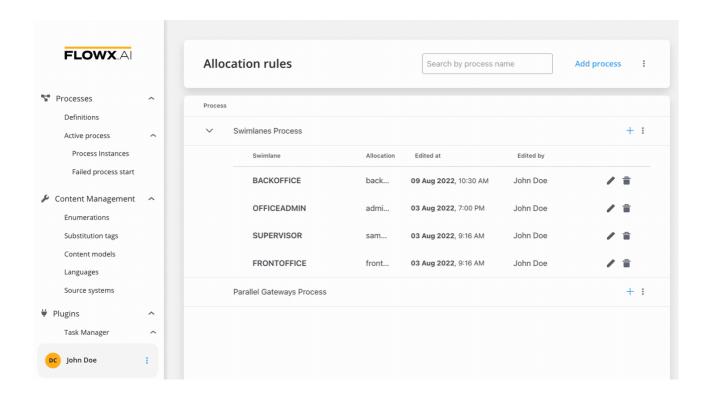


Exporting/importing process allocation rules

To copy process allocation rules and move them between different environments, you can use the export/import feature.

You can export process allocation rules as JSON files directly from the allocation rules list:





Was this page helpful?

PLATFORM DEEP DIVE / Plugins / Plugins / Task management / Using hooks

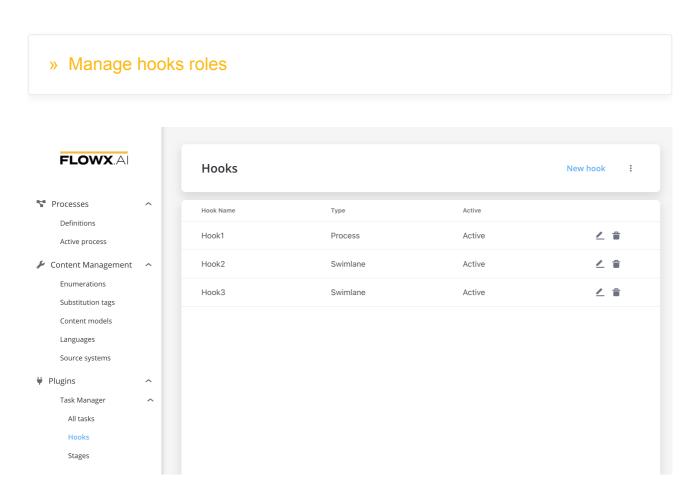
Hooks allow you to extract stateful logic from a component, so it can be tested and reused independently.

Users with task management permissions can create hooks to trigger specific

The fallback content to display on prerendering , such as sending notifications when



The fallback content to display on prerendering occur. Follow the instructions below to set up roles for hooks scope usage:



Hooks can be linked to different events and define what will happen when they are triggered. Below you can find a list of all possible triggers for each hook.

Process Swimlane Stage

- unique result
- · only one rule will match, or no rule

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Creating a hook

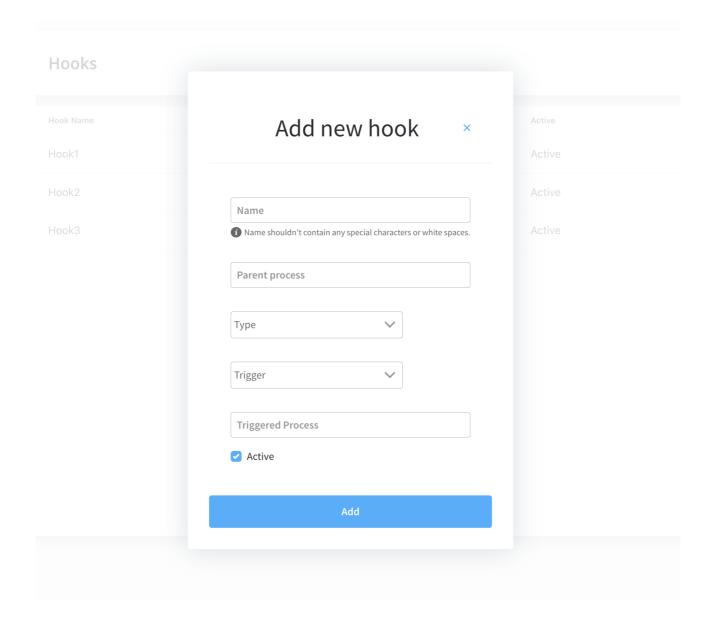
To create a new hook, follow the next steps:

1. Open

The fallback content to display on prerendering

.

- 2. Go to Task Manager and select **Hooks**.
- 3. Click **New Hook** (you can also import or export a hook).
- 4. Fill in the required details.



Types of hooks

There are three types of hooks you can create in Task Manager:

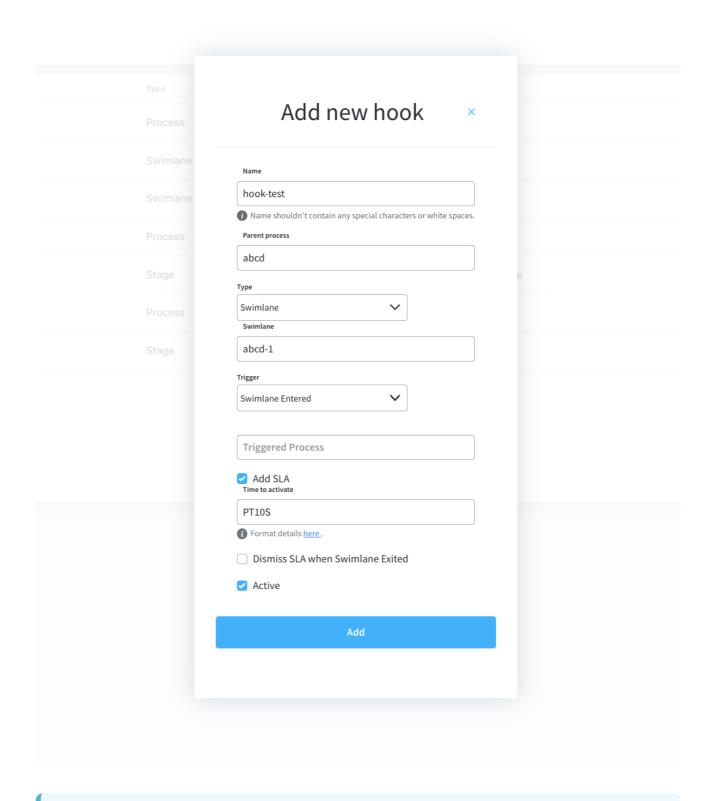
- process hooks
- swimlane hooks
- stage hooks





Swimlane and stage hooks can be configured with an SLA (time when a triggered process is activated).





! INFO



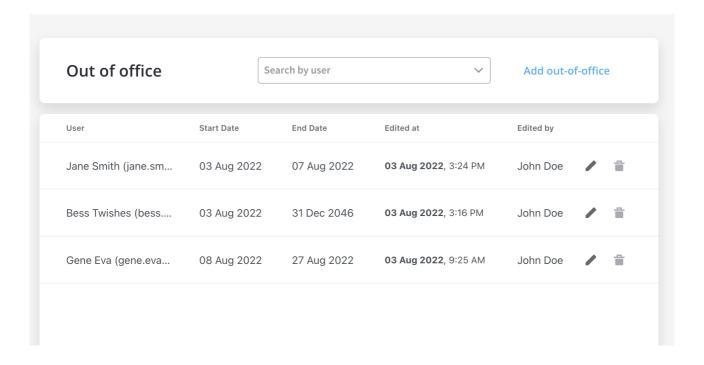
Dismiss SLA is available only for hooks configured with SLA.

Here you can find more information about the SLA - duration formatting.

Was this page helpful?

PLATFORM DEEP DIVE / Plugins / Custom Plugins / Task management / Using out of office records

The Out-of-office feature allows you to register users availability to perform a task. It can be allocated manually or automatically.



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(!) INFO

Users with out-of-office status are excluded from the candidates for automatic task allocation list during the out-of-office period. More information about allocation rules, here.

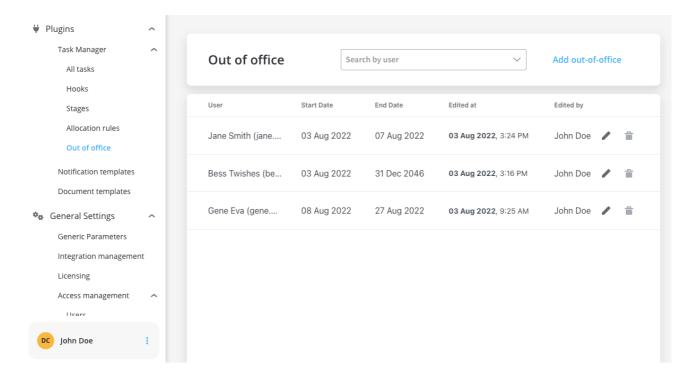
Accessing out-of-office records

To add out-of-office records, follow the next steps:

1. Open

The fallback content to display on prerendering

2. From the side menu, under **Task Management**, select the **Out office entry**.



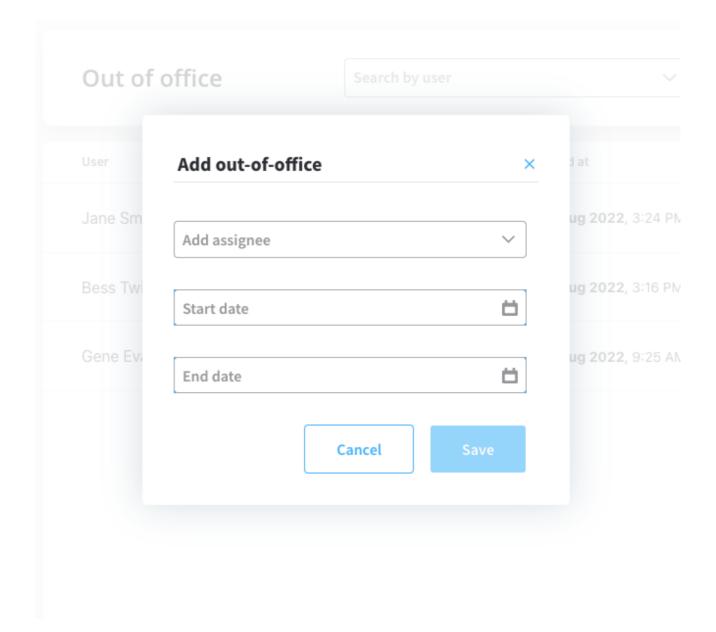
Adding out-of-office records





To add out-of-office records, follow the next steps:

- 1. Click **Add out-of-office** button, in the top-right corner.
- 2. Fill in the following mandatory details:
 - Assignee user single select
 - Start Date (! cannot be earlier than tomorrow)
 - End Date (! cannot be earlier than tomorrow)



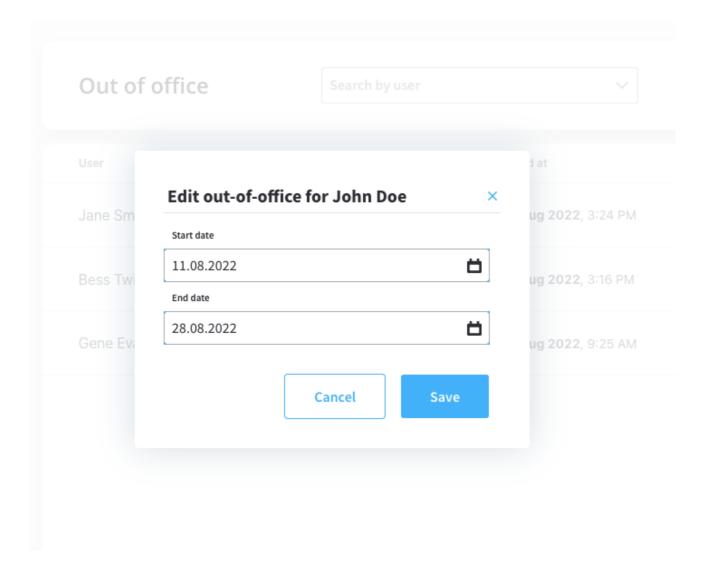


3. Click Save.

Editing out-of-office records

To edit out-of-office records, follow the next steps:

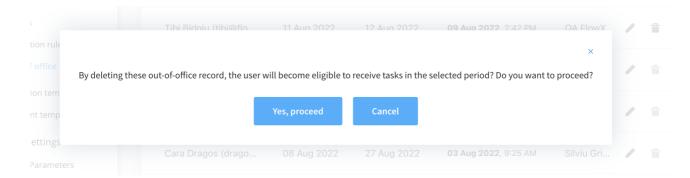
- 1. Click **Edit** button.
- 2. Modify the dates (! cannot be earlier than tomorrow).
- 3. Click Save.



Deleting out-of-office records

To delete out-of-office records, follow the next steps:

- 1. From the **out-of-office list**, select a **record**.
- 2. Click **Delete** button. A pop-up message will be displayed: "By deleting this out-of-office record, the user will become eligible to receive tasks in the selected period. Do you want to proceed?"





If you choose to delete an out-of-office record, the user is eligible to receive tasks allocation during the mentioned period. More information about automatic task allocation, here.

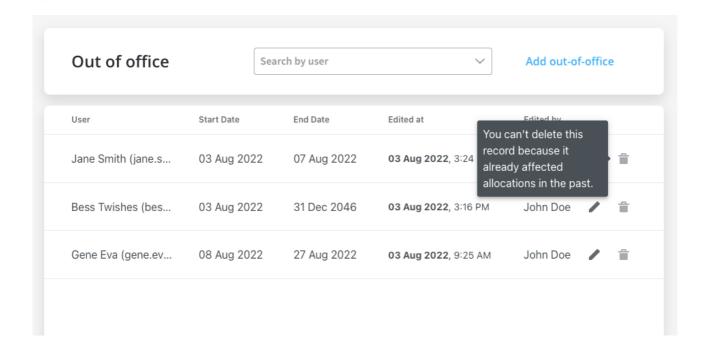
3. Click Yes, proceed if you want to delete the record, click Cancel if you want to abort the deletion.



A CAUTION

If the out-of-office period contains days selected in the past, the user cannot delete the record, the following message is displayed: "You can't delete this

© FLOWX.AI 2023-07-26 Page 21 / 26 record because it already affected allocations in the past. Try to shorten the period, if it didn't end."

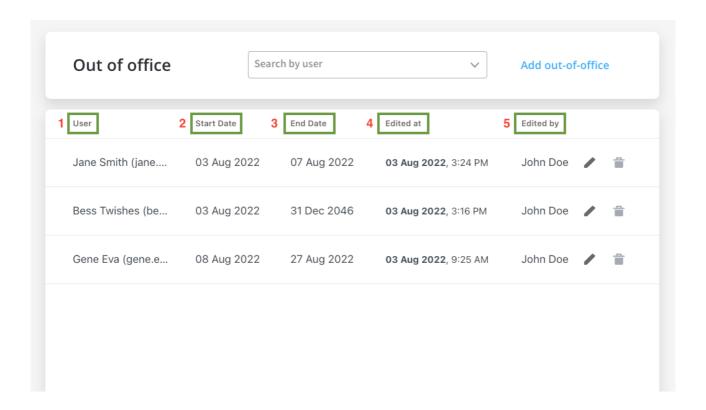


Viewing out-of-office records

The out-of-office records list contains the following elements:

- 1. **User** firstName, lastName, userName
- 2. Start Date the date when the out-of-office period will be effective
- 3. End Date the date when the out-of-office period will end
- 4. Edited at the last time when an out-of-office record was edited
- 5. Edited by the user who edited/created the out-of-office record





(!) INFO

The list is sorted in reverse chronological order by "edited at" dateTime (newest added on top).

Was this page helpful?

PLATFORM DEEP DIVE / Plugins / Plugins / Task management / Using stages

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You can define specific stages during the execution of a process. Stages are configured on each node and they will be used to trigger an event when passing from one stage to another.

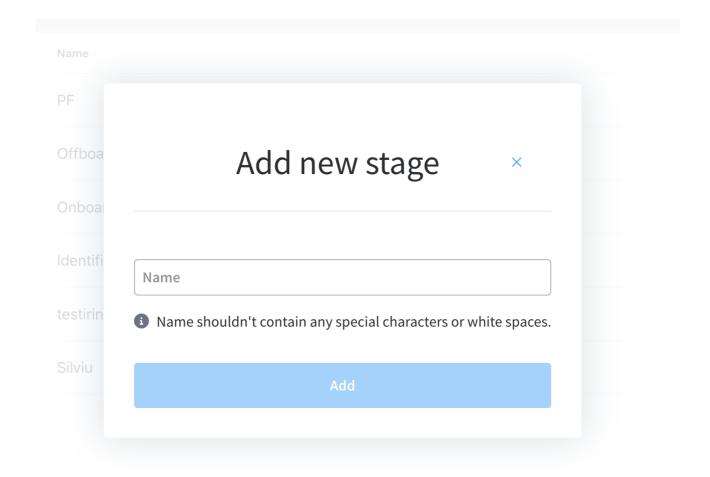
Creating a new stage

To create a new stage, follow the next steps:

- 1. Open
 - The fallback content to display on prerendering
- 2. Go to Task Manager and select **Stages**.
- 3. Click New Stage.
- 4. Fill in the required details.

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Stages



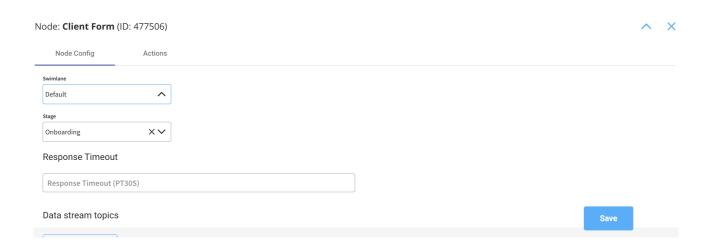
Assigning a node to a stage

To assign a node to a stage, follow the next steps:

- 1. Open **FLOWX Designer** and then select your **process**.
- 2. Choose the node you want to assign and select the **Node Config** tab.
- 3. Scroll down until you find the **Stage** field and click the dropdown button.
- 4. Choose the stage you want to assign.

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