



**PLATFORM DEEP DIVE / Plugins / Custom Plugins / Task management / using-allocation-rules**

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## PLATFORM DEEP DIVE / Plugins / Custom Plugins / 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).

Allocation rules

Search by process name

Add process

Process

Swimlanes Process

| Swimlane    | Allocation               | Edited at             | Edited by |                         |
|-------------|--------------------------|-----------------------|-----------|-------------------------|
| BACKOFFICE  | backoffice@email.com     | 09 Aug 2022, 10:30 AM | John Doe  | <div></div> <div></div> |
| OFFICEADMIN | admin@email.com          | 03 Aug 2022, 7:00 PM  | John Doe  | <div></div> <div></div> |
| SUPERVISOR  | same as execution rights | 03 Aug 2022, 9:16 AM  | John Doe  | <div></div> <div></div> |
| FRONTOFFICE | frontoffice@email.com    | 03 Aug 2022, 9:16 AM  | John Doe  | <div></div> <div></div> |

Parallel Gateways Process



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.

The screenshot shows the 'Allocation rules' interface. On the left is a side menu with categories: Content models, Languages, Source systems, Plugins (expanded), Task Manager (expanded), All tasks, Hooks, Stages, Allocation rules (highlighted in blue), Out of office, Notification templates, Document templates, General Settings (expanded), Generic Parameters, and Integration management. At the bottom of the side menu is a user profile for 'John Doe' with a 'DC' icon. The main content area is titled 'Allocation rules' and includes a search bar 'Search by process name' and an 'Add process' button. Below this, there are two process sections: 'Parallel Swimlanes Process' and 'Parallel Gateways Process'. The 'Parallel Swimlanes Process' section contains a table with the following data:

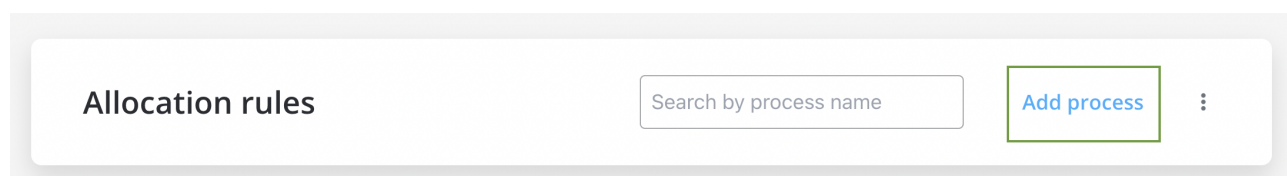
| Swimlane    | Allocation | Edited at            | Edited by |  |
|-------------|------------|----------------------|-----------|--|
| OFFICEADMIN | o...       | 03 Aug 2022, 7:00 PM | John Doe  |  |
| SUPERVISOR  | s...       | 03 Aug 2022, 9:16 AM | John Doe  |  |
| BACKOFFICE  | b...       | 03 Aug 2022, 9:16 AM | John Doe  |  |
| FRONTOFFICE | f...       | 03 Aug 2022, 9:16 AM | John Doe  |  |

The 'Parallel Gateways Process' section is currently empty.

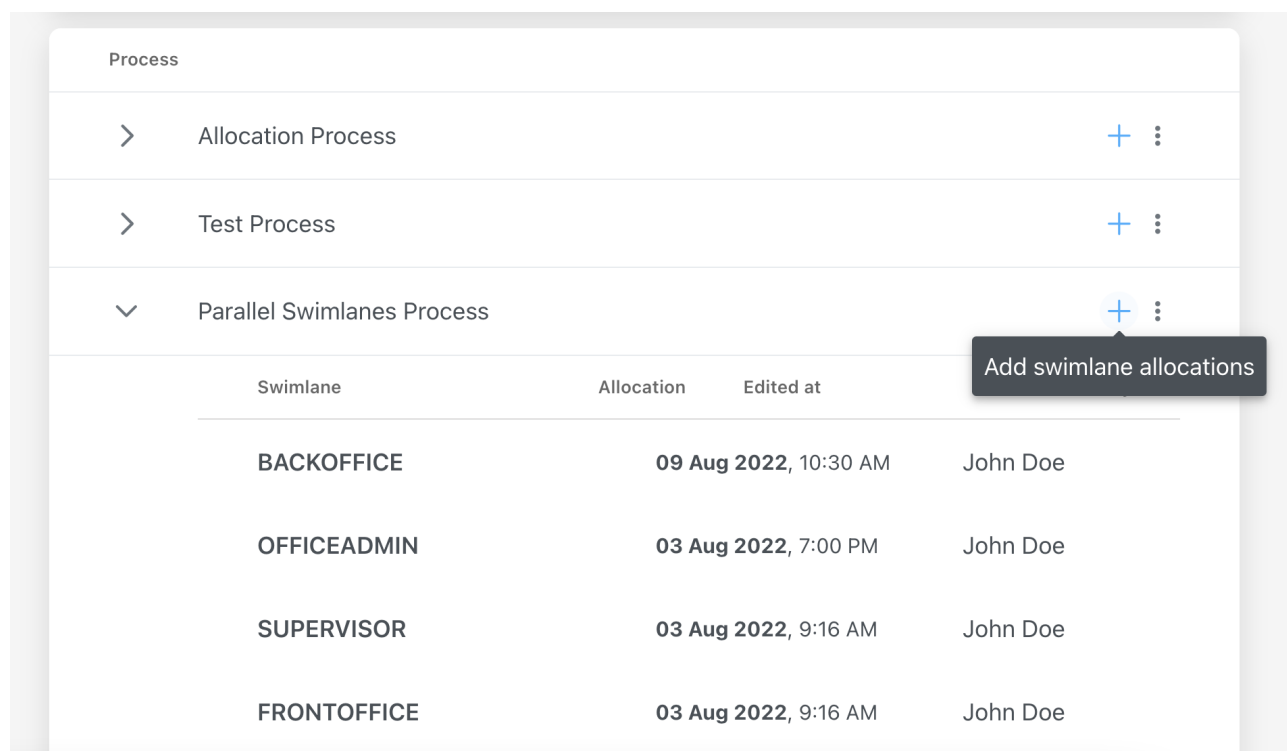
## Adding process and allocation rules

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

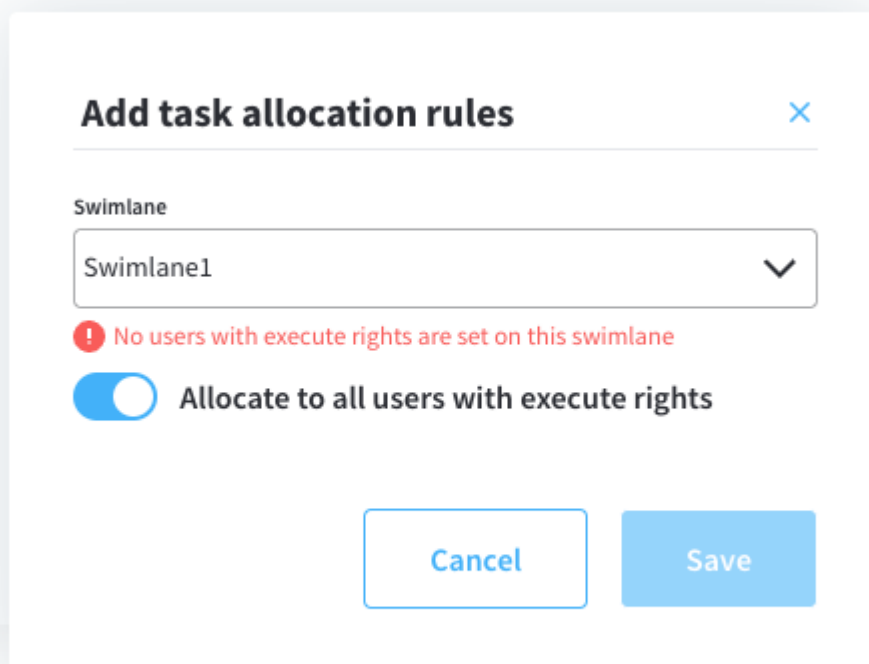
1. Click **Add process** button, in the top-right corner. More details on how to create/configure a process are [here](#).



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



**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:



**Add task allocation rules** ✕

Swimlane

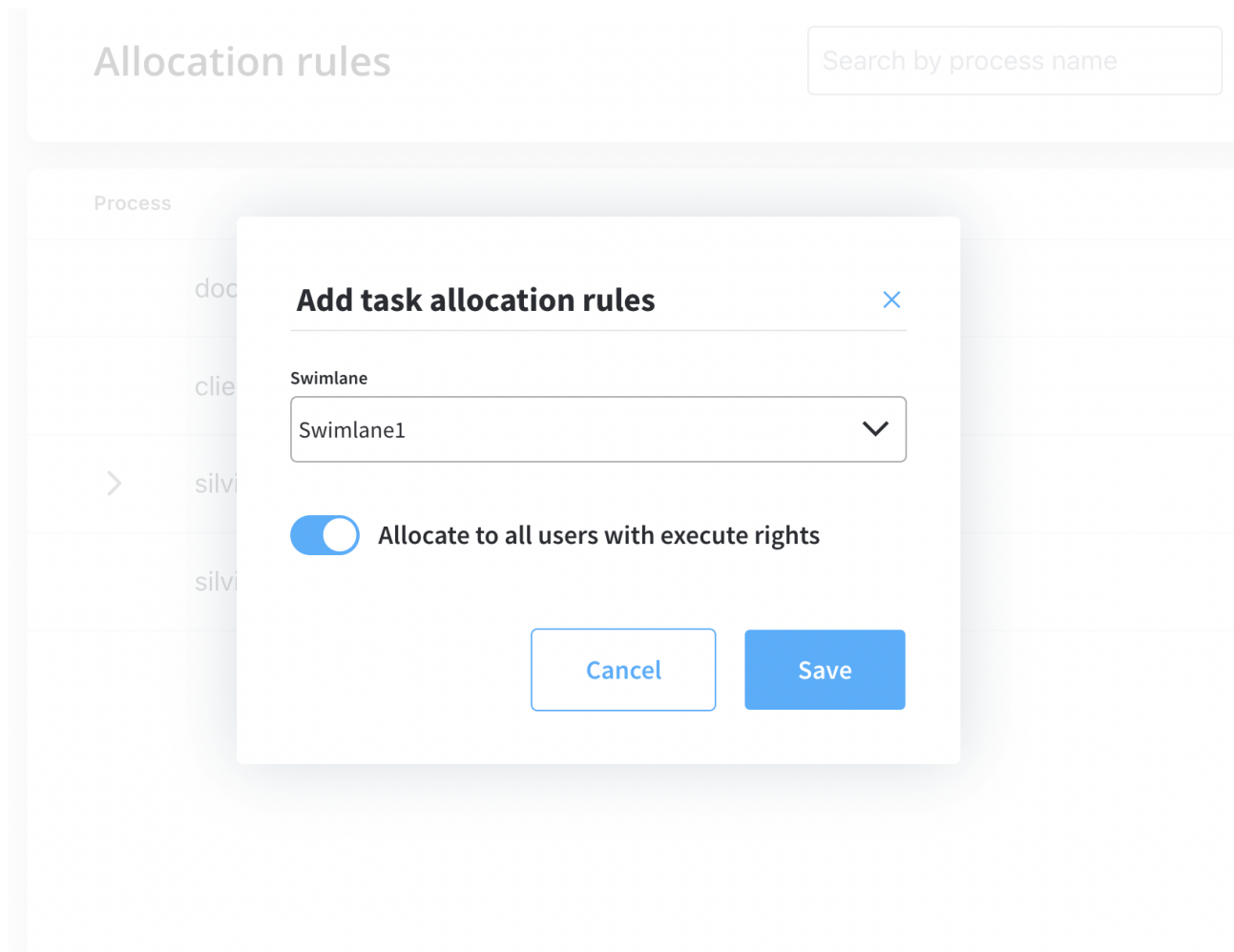
Swimlane1 ▼

! No users with execute rights are set on this swimlane

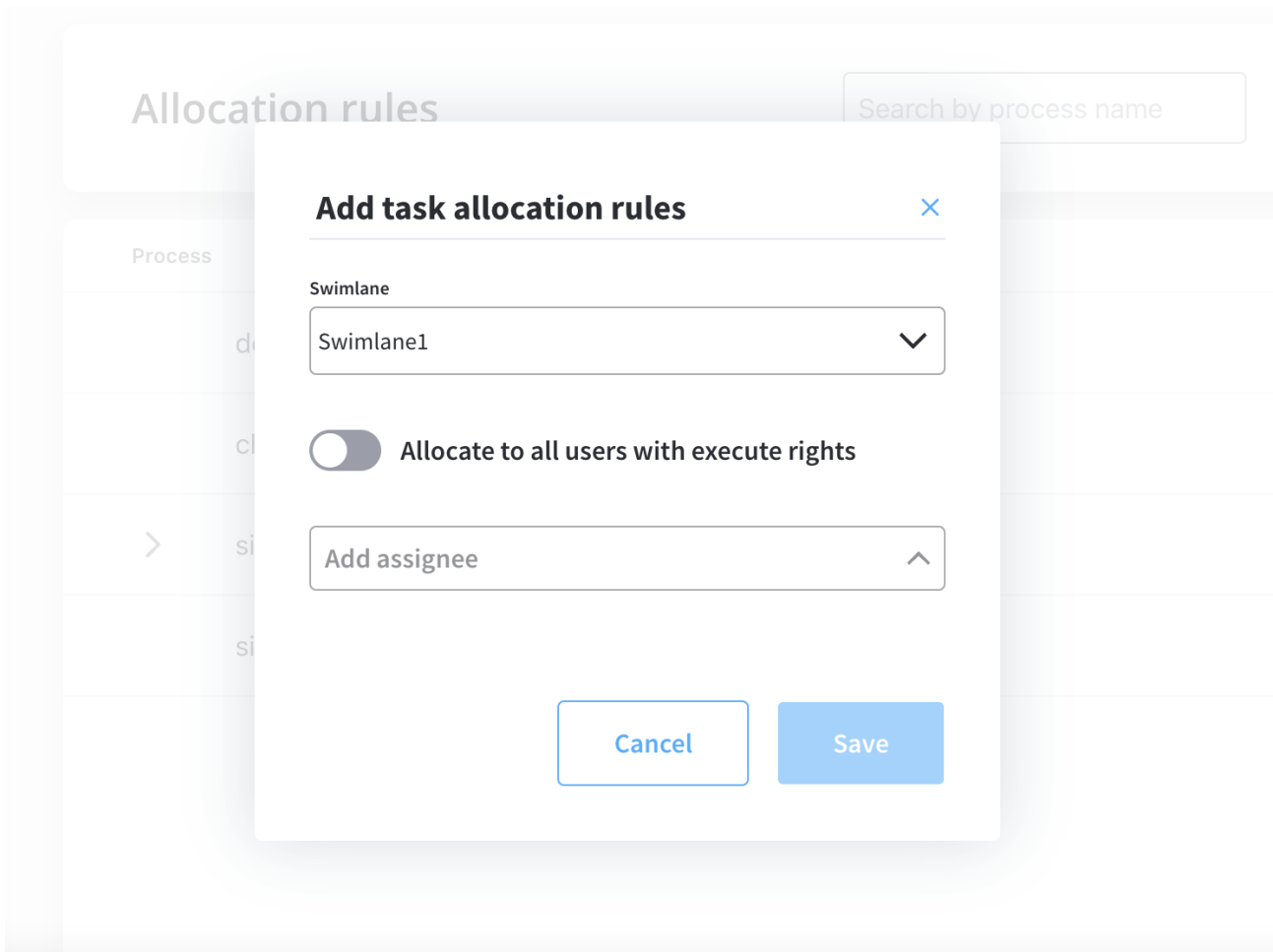
☒ Allocate to all users with execute rights

Cancel Save

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.

### Allocation rules

Search by process name

[Add process](#)

Process

> Allocation Process

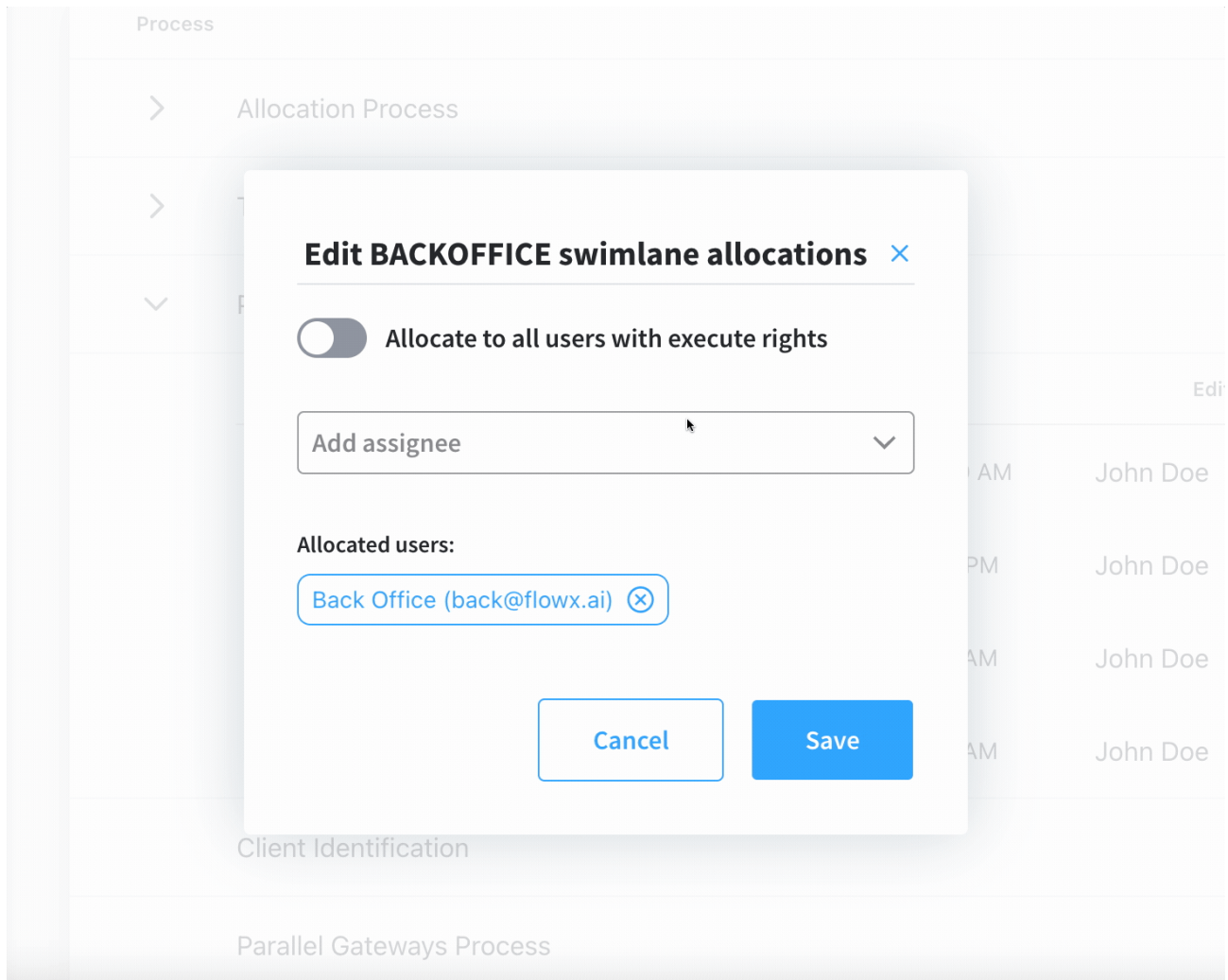
> Test Process

∨ Parallel Swimlanes Process

| Swimlane    | Allocation            | Edited at | Edited by                             |
|-------------|-----------------------|-----------|---------------------------------------|
| BACKOFFICE  | 09 Aug 2022, 10:30 AM | John Doe  | <div><div>Edit</div><div></div></div> |
| OFFICEADMIN | 03 Aug 2022, 7:00 PM  | John Doe  | <div><div></div><div></div></div>     |
| SUPERVISOR  | 03 Aug 2022, 9:16 AM  | John Doe  | <div><div></div><div></div></div>     |
| FRONTOFFICE | 03 Aug 2022, 9:16 AM  | John Doe  | <div><div></div><div></div></div>     |

## 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

Allocation rules

Search by process name

Add process

Process

1

Swimlanes Process

2

Swimlane

3

Allocation

4

Edited at

5

Edited by

BACKOFFICE

backoffice@email.com

09 Aug 2022, 10:30 AM

John Doe

OFFICEADMIN

admin@email.com

03 Aug 2022, 7:00 PM

John Doe

SUPERVISOR

same as execution rights

03 Aug 2022, 9:16 AM

John Doe

FRONTOFFICE

frontoffice@email.com

03 Aug 2022, 9:16 AM

John Doe

Parallel Gateways Process

## 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:

FLOWX.AI

Processes

Definitions

Active process

Process Instances

Failed process start

Content Management

Enumerations

Substitution tags

Content models

Languages

Source systems

Plugins

Task Manager

John Doe









Allocation rules

Search by process name

Add process

Process

Swimlanes Process

| Swimlane    | Allocation | Edited at             | Edited by |   |
|-------------|------------|-----------------------|-----------|---|
| BACKOFFICE  | back...    | 09 Aug 2022, 10:30 AM | John Doe  |   |
| OFFICEADMIN | admi...    | 03 Aug 2022, 7:00 PM  | John Doe  |   |
| SUPERVISOR  | sam...     | 03 Aug 2022, 9:16 AM  | John Doe  |   |
| FRONTOFFICE | front...   | 03 Aug 2022, 9:16 AM  | John Doe  |   |

Parallel Gateways Process

Was this page helpful?