Prototyping and Production Cycles

In order to log on with different users, instead of doing it always with the administrator user, we must first modify Workflow's execution mode in GeneXus.

In the Preferences window, in the Environment properties, we go to Workflow, and in ExecutionMode we change **Prototyper** to **StandardClient**.

If we execute the FlightTicketReservation diagram we will see that the workflow client opens a dialog box. In this case we will log on with user Peter Kent.
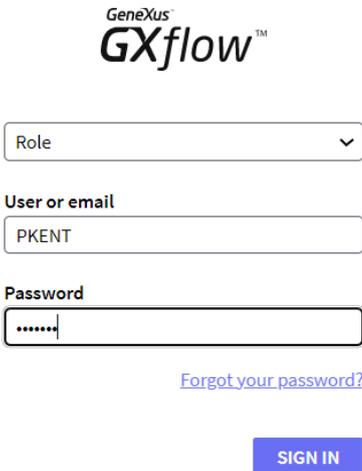
We'll see that user Peter Kent appears as logged on and the access to activities on the Browser has been reduced because this user holds fewer permits than the administrator.

Note that the incoming tray is empty.
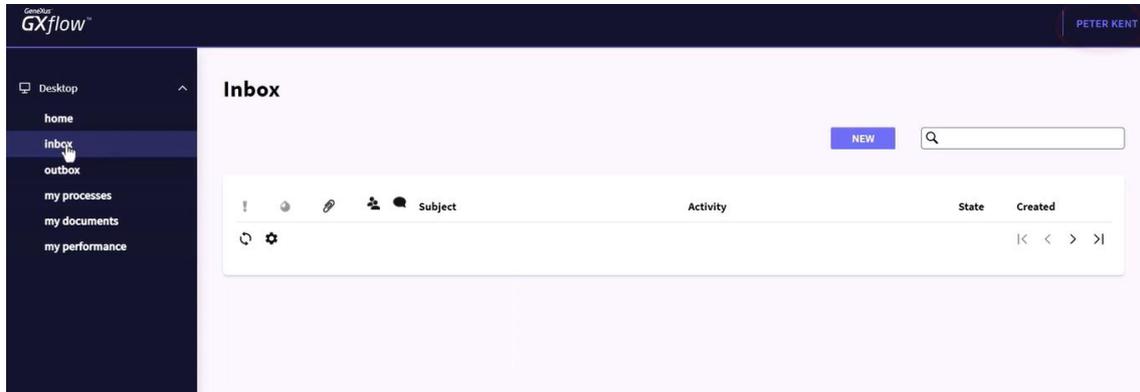
Now let's press the New button to initiate a process. We can see that a dialog box is opened with the FlightTicketReservation process as the only process available for selection.
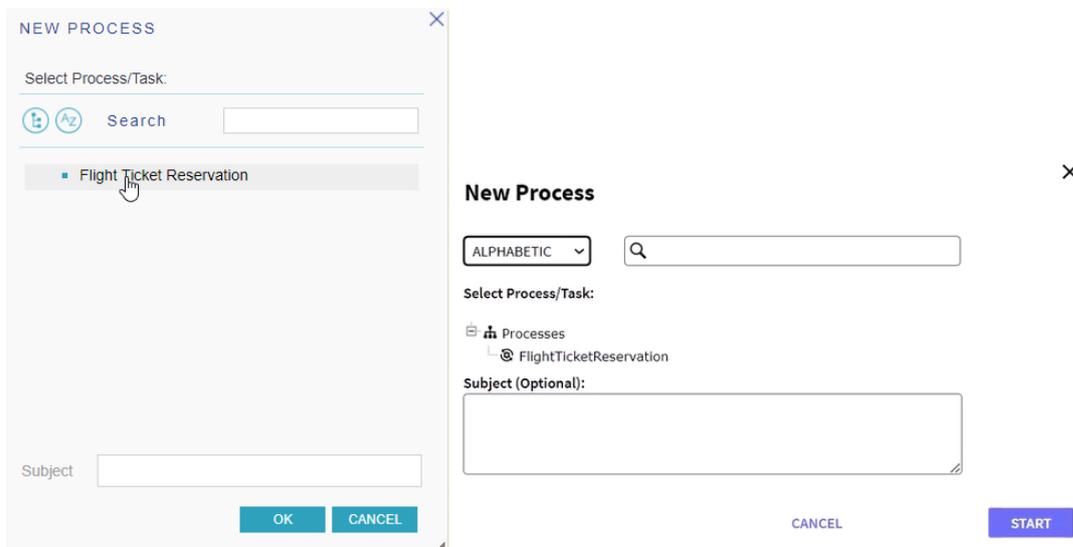
We must remember that we assigned to this user the TravelAgencyEmployee role, authorizing the user to initiate the FlightTicketReservation process. So we select it and press OK.

We can see that the incoming tray shows the TicketReservation task as pending, which could also be executed by the TravelAgencyEmployee role which corresponds to user Peter Kent.
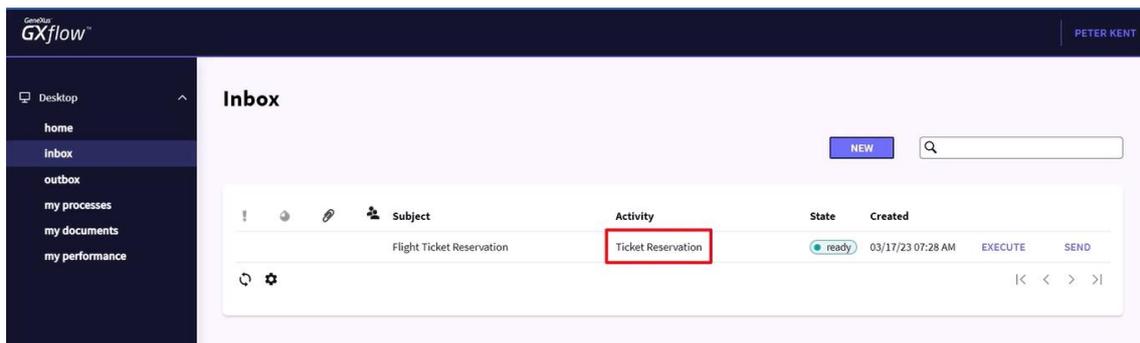
Let's execute the task and enter the reservation… As we complete the task we can see that the instances of the ContactAirlines task appear as pending, since this user also holds a permit to execute them.
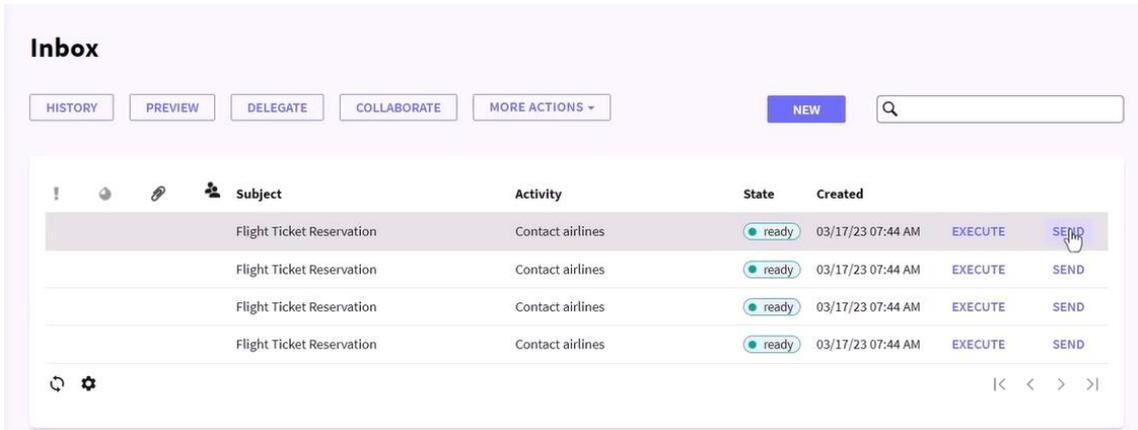
We execute them, … and complete …

Now the **Add customer information required for travelling** task is the only one appearing as pending.
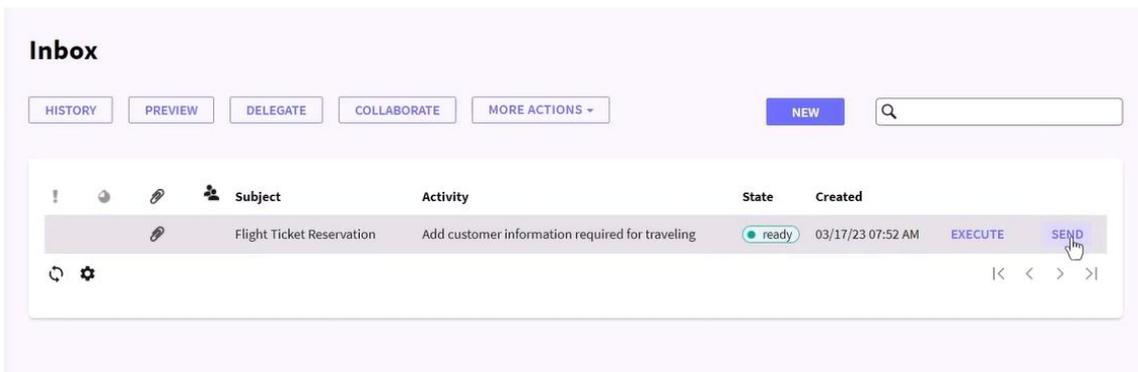
If we look at the diagram we will see that the **EvaluateCustomer** task is also being executed but we defined this task with the TravelAgencyManager role, so user Peter Kent will not be able to execute it, and so it does not appear as pending in the incoming tray.
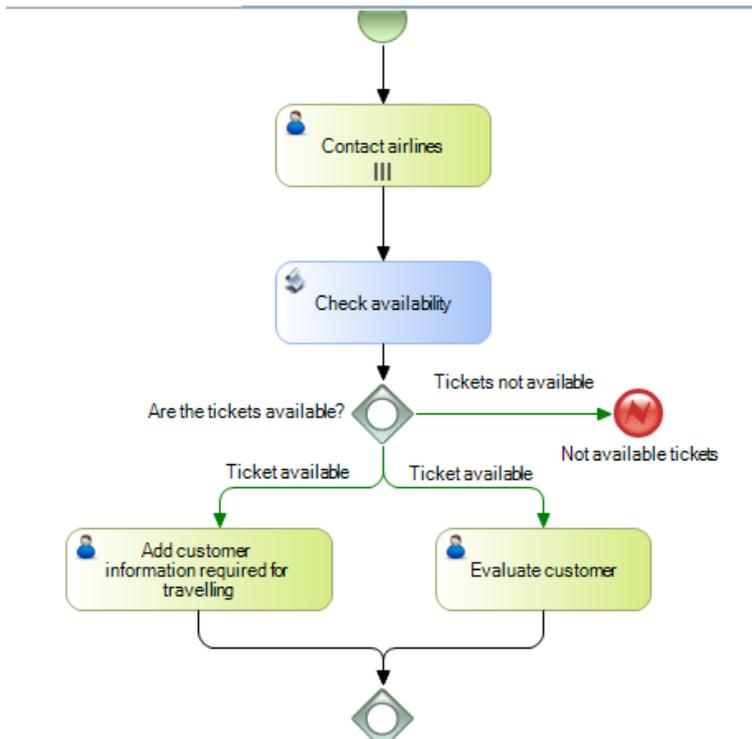
Let's execute this task and we will see that the incoming tray is now empty. If we go to the outgoing tray we will see all the tasks that were executed by this user.

Outbox

!	○	Subject	Activity	State	Created	Ended	
		Flight Ticket Reservation	Add customer information required for traveling	○ completed	03/17/23 07:52 AM	03/17/23 08:06 AM	VIEW HISTORY
		Flight Ticket Reservation	Contact airlines	○ completed	03/17/23 07:44 AM	03/17/23 07:44 AM	VIEW HISTORY
		Flight Ticket Reservation	Contact airlines	○ completed	03/17/23 07:44 AM	03/17/23 07:52 AM	VIEW HISTORY
		Flight Ticket Reservation	Contact airlines	○ completed	03/17/23 07:44 AM	03/17/23 07:52 AM	VIEW HISTORY
		Flight Ticket Reservation	Contact airlines	○ completed	03/17/23 07:44 AM	03/17/23 07:52 AM	VIEW HISTORY
		Flight Ticket Reservation	Ticket Reservation	○ completed	03/17/23 07:28 AM	03/17/23 07:44 AM	VIEW HISTORY

If we select the **Add customer information required for travelling** task and press History, we will view the history of the process, the user who executed each task and the candidates that may execute the following tasks.

For the time being, all tasks were executed by Peter Kent or by the Workflow engine.

For the process to advance, the EvaluateCustomer task (appearing as N/A because there is no user assigned to it) must be executed, and therefore a "manager" user must participate. So, we will do a Sign out and log on with user Anna Smith, previously defined as manager.

When Gxflow client is open we can see that, as expected, the EvaluateCustomer task appears as pending in the incoming tray.

Let's now execute this task by authorizing the client... Now what appears as pending is the authorization of the reservation by the customer services manager
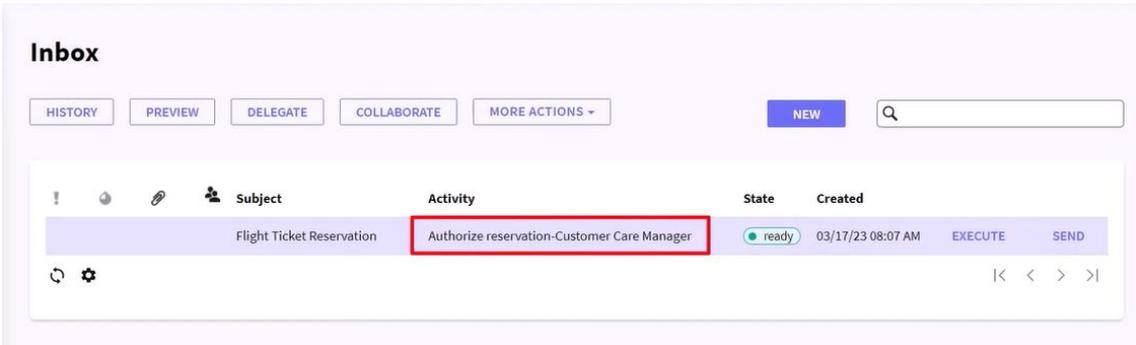
Note that only this task appears as pending and not the **Check reservation documents** which was defined in the diagram and is to be executed by an employee, while now we are executing with the manager role.
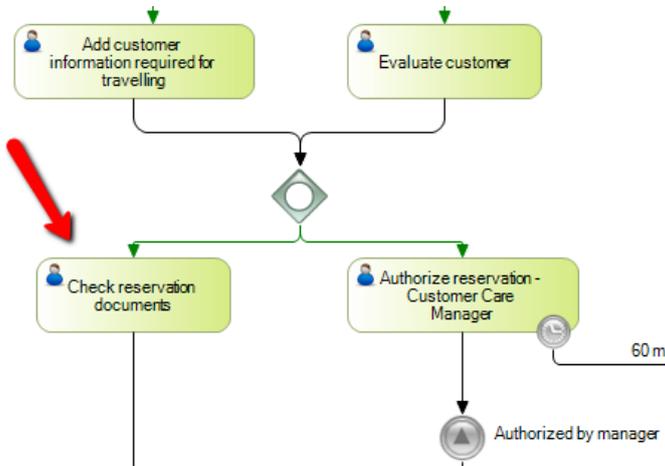
Let's authorize the reservation and complete the task. Note that user Anna Smith, as manager, no longer has any pending tasks.
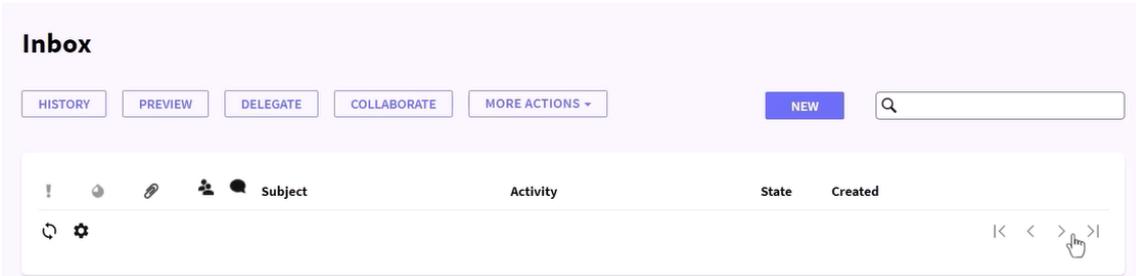
Let's now log on again with user Peter Kent and complete the process.

GeneXus
GXflow™

Role

User or email

PKENT

Password

••••••••

Forgot your password?

SIGN IN

Inbox

NEW

!	◔	📎	👥	Subject	Activity	State	Created		
		📎		Flight Ticket Reservation	Check reservation documents	● ready	03/17/23 08:07 AM	EXECUTE	SEND

↻ ⚙ |< < > >|

Inbox

HISTORY | PREVIEW | DELEGATE | COLLABORATE | MORE ACTIONS ▾

NEW

!	◔	📎	👥	Subject	Activity	State	Created		
				Flight Ticket Reservation	Notify customer of authorization	● ready	03/17/23 08:08 AM	EXECUTE	SEND

↻ ⚙ |< < > >|

Inbox

HISTORY | PREVIEW | DELEGATE | COLLABORATE | MORE ACTIONS ▾

NEW

!	◔	📎	👥	💬	Subject	Activity	State	Created

↻ ⚙ |< < > >|

One situation that the travel agency requested us to consider is that of an employee who is absent, since as we have defined it so far, there would be processes left awaiting for users with the role and this might cause delays.

For the tasks to be automatically transferred on to a substitute we use the "Out of Office" functionality. To use this we will log on with the administrator user... and then go to Users, select user Anna Smith and in More Actions we select Edit.

Users

EDIT	REMOVE	DISPLAY	ROLES	MORE ACTIONS ▾		NEW	🔍

👤	👥	Id	Name	Email
		ASMITH	ANNA SMITH	asmith@gmail.com
		PKENT	PETER KENT	pkent@gmail.com
		WFADMINISTRATOR	Workflow Administrator	
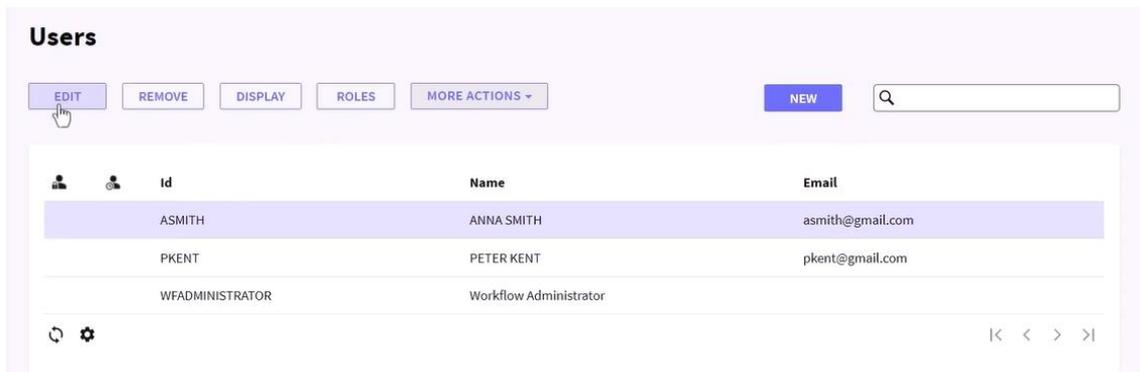
We choose the Availability tab and see that a window opens up where we can defined whether the user is currently in the office or not.

Edit User   ✕

General   **Availability**   Certificates

○ User is currently in the office
◉ User is currently out of the office

OK

If our option is that the user is out of the office and we press OK, then another window will open up, where we can enter further information relative to the absence such as defining the return date and the message to be shown when that user is called.

Out Of Office Assistant   ✕

General   Substitution

Return Date   [03/31/23] 📅

Message   [   ]

CANCEL   OK
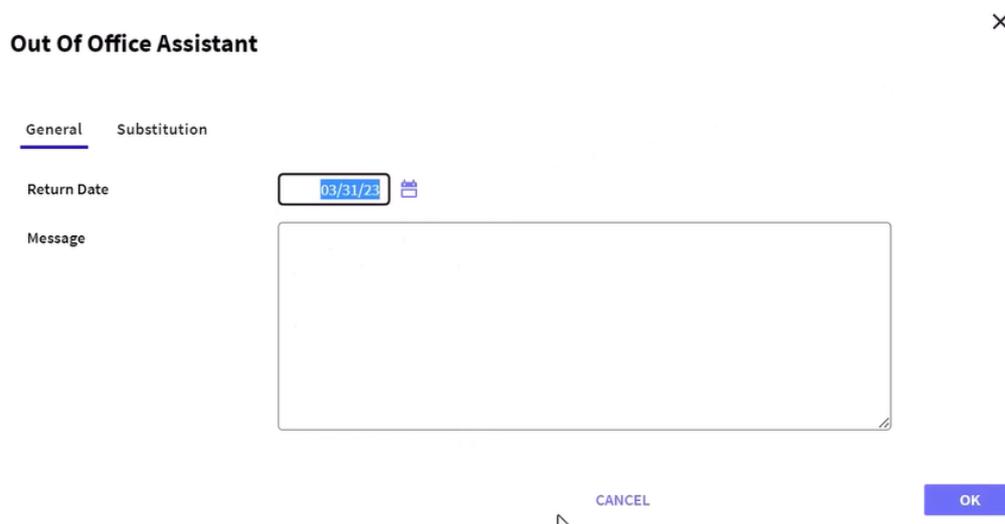
If we choose the Substitution tab we can also select the user who we want to execute the tasks while the other individual is absent.

In this case, for Anna we define her tasks to be done by Peter Kent.
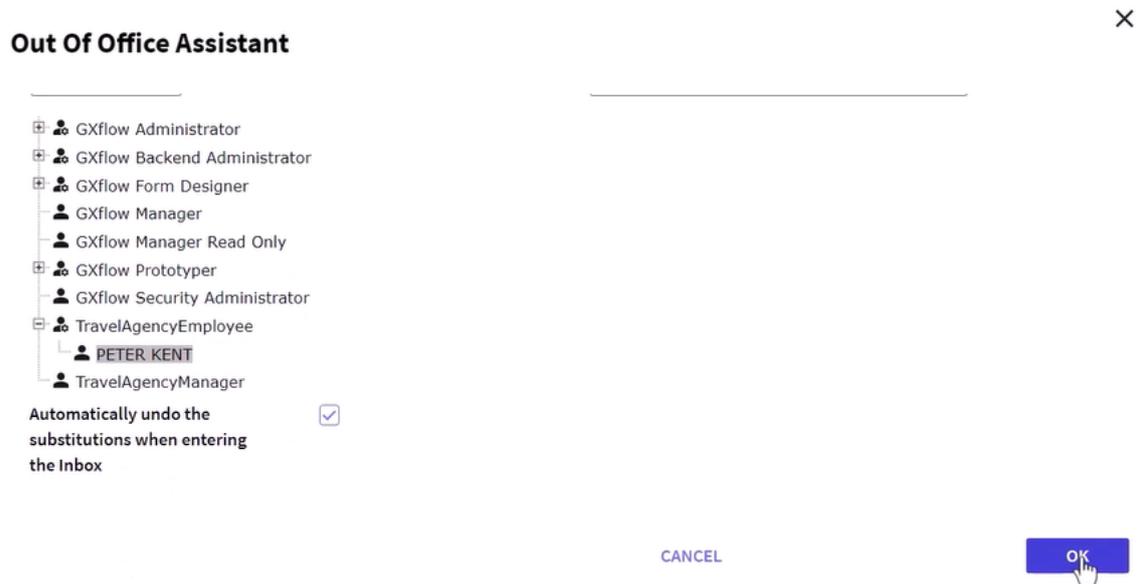
We press OK once, and once again OK. Now, next to user Anna Smith we have an indicator showing that this user is absent.
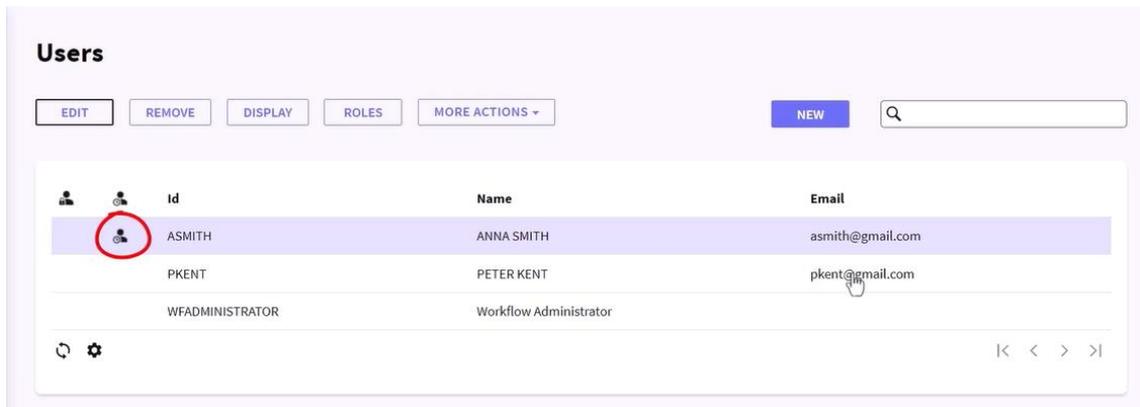
To view this we log out and log on with user Peter Kent.

We press button New, instance the FlightTicketReservation process and execute the TicketReservation tasks and the ContactAirlines instances.

Now we have two pending tasks, the one performed by the employee to add information for the trip, and also the EvaluateCustomer task which was only allowed to managers.

Even when Peter Kent does not have the required manager role to assess customers, this user was defined as substitute during Anna Smith's absence, so Peter Kent will now have the user roles of the person he is substituting.

If we execute task EvaluateCustomer we can see that, in fact, the employee Peter Kent is allowed to fulfill the manager tasks for which he is now acting as substitute.

We have seen how it is possible to define security for our processes, by establishing users and roles, and limiting who is allowed to execute each task under which circumstances.

For further information visit the wiki link:

https://wiki.genexus.com/commwiki/servlet/wiki?9340,GXflow+Management+Console