

6.5 Example of using Process Helper to activate Process Graph

Configuring a process helper within a process allows you to activate the section called “Process Graph” available in the “PROCESS GRAPH” tab of the details of each individual record (Figure 1)

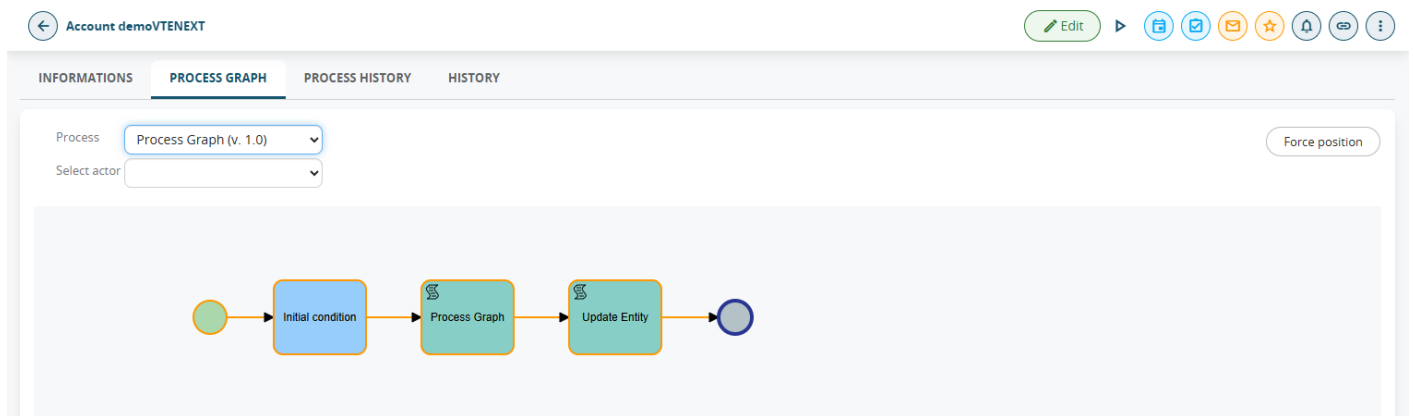


Figure 1

From this screen you can view the path taken from start to finish and the users (called “Participants”) involved in the various Tasks/Action Tasks of the process (Figure 2).

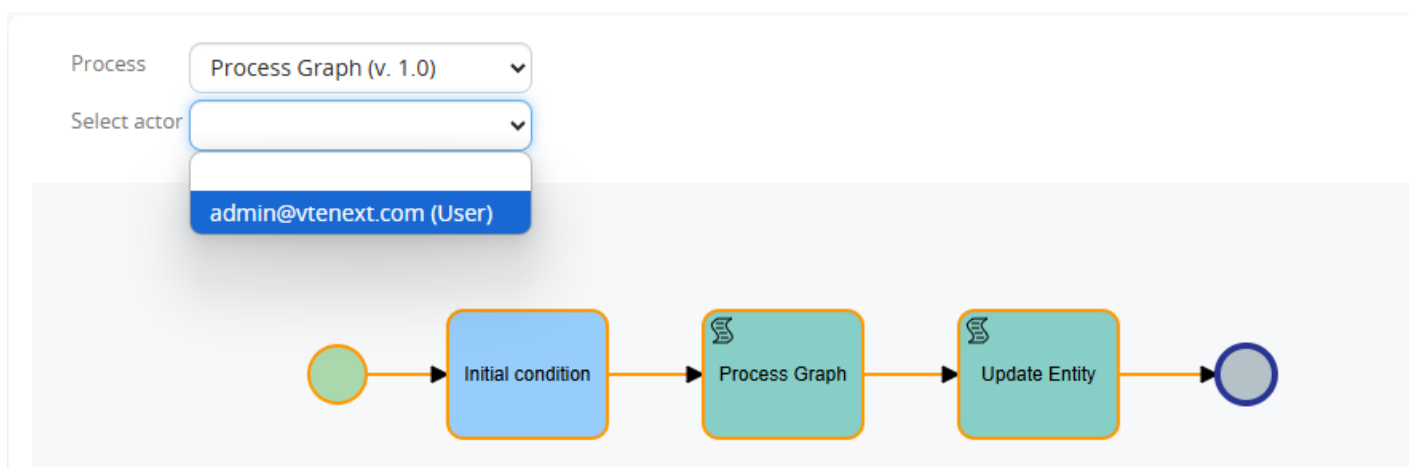


Figure 2

Also, since version 24.08, the individual Tasks/Action Tasks of the process that have already been executed are highlighted in yellow (Figure 3)

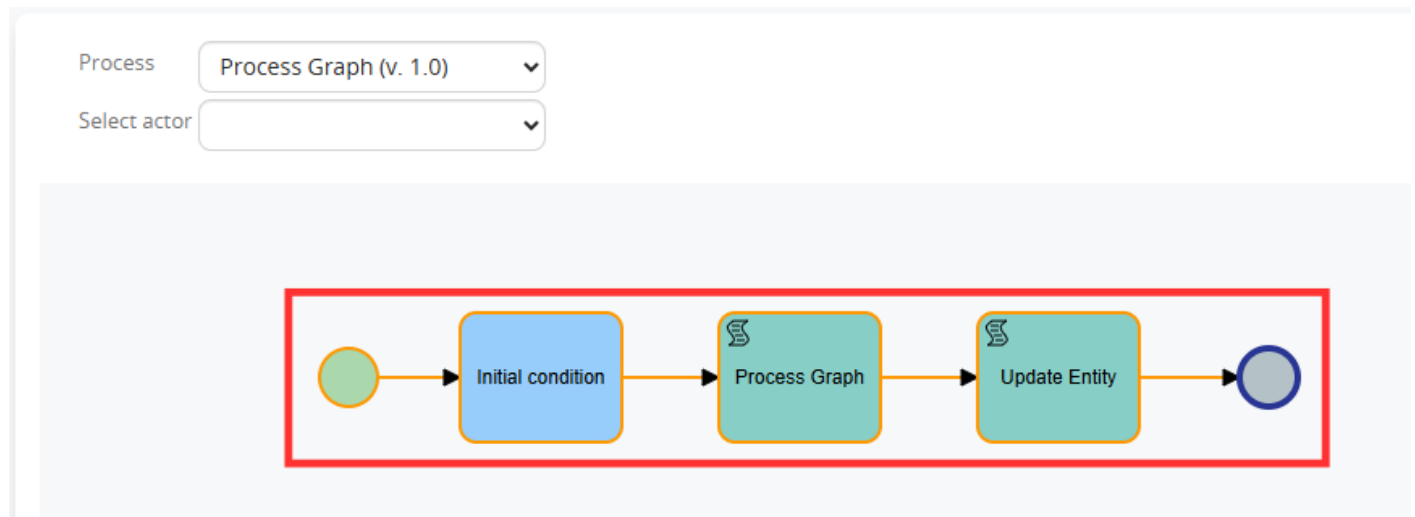


Figure 3

Instead, the point where the process is located at that specific moment is highlighted in blue (Figure 4).

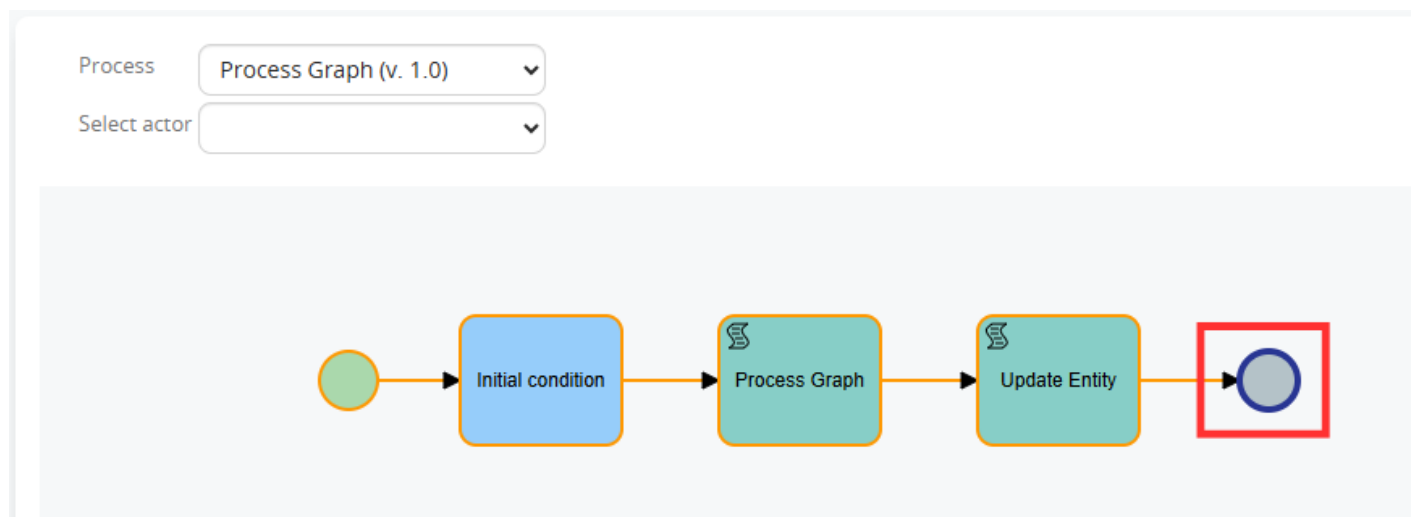


Figure 4

By clicking on each individual Task/Action Task it is possible to view the specific logs relating to those who performed the specific task and the relative time frame (Figure 5)

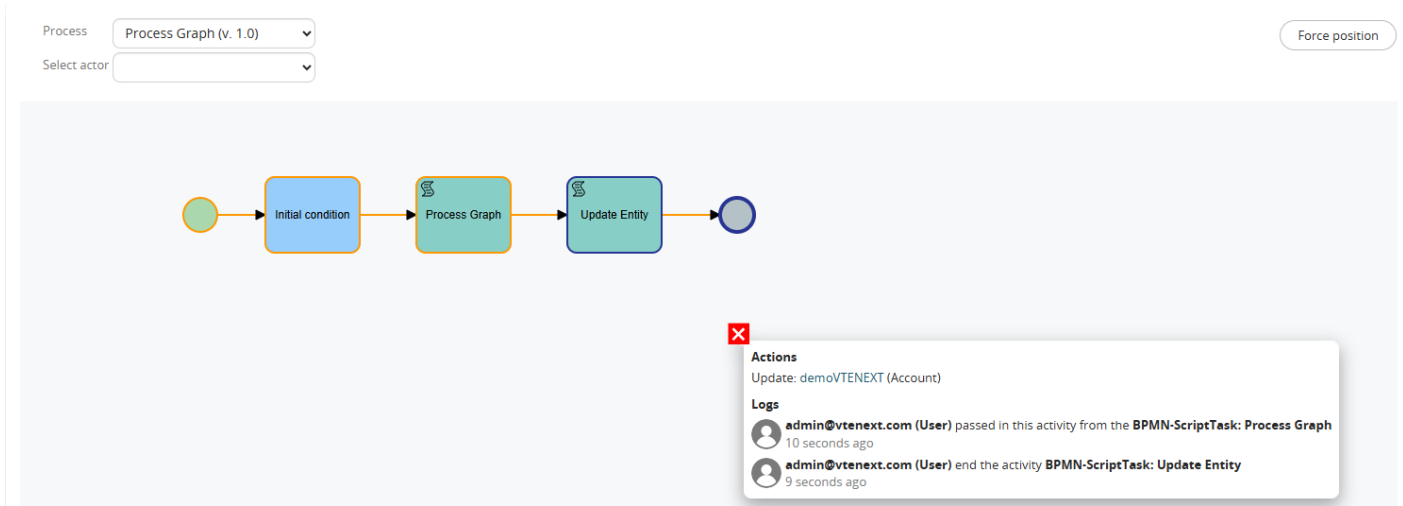


Figure 5

From version 24.08, if a dynamic Form is configured in a Process helper, clicking on the related Action Task and then on “Details” will allow you to view its content (Figure 6)

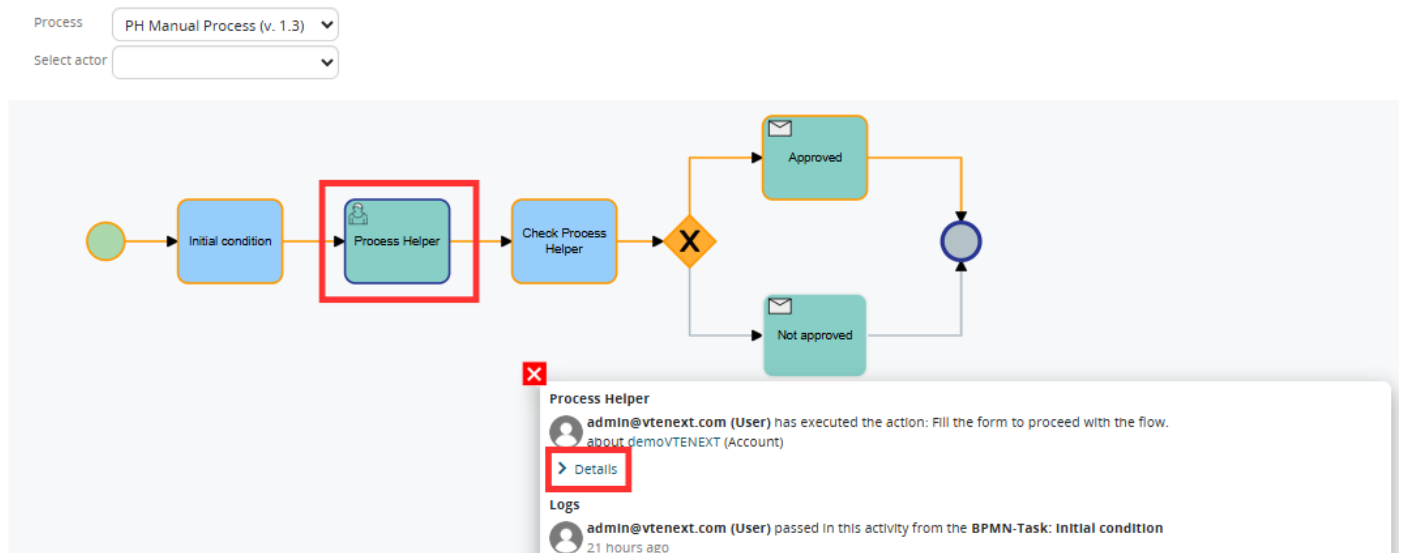


Figure 6

Starting with version 26.07, the log display interface has been improved by opening a dedicated panel on the right. (Figure 7)

Lead Davis Jennifer

INFORMATION

PROCESS GRAPH

PROCESS HISTORY

HISTORY

Process

Conversione lead (v. 1.16)

Select actor

```

graph LR
    Start(( )) --> LeadToConvert[Lead to convert]
    LeadToConvert --> RequestDetails[Request details]
    RequestDetails --> CreateAccount{Create account?}
    CreateAccount -- yes --> CreateAccountTask[Create account]
    CreateAccount -- exists --> UseExistingAccount[Use existing account]
    CreateAccount -- no --> CreateContact[Create contact?]
    CreateAccountTask --> End(( ))
    UseExistingAccount --> End
    CreateContact --> End
          
```

Actions

Reset DF

Set status in conversion Davis Jennifer (Lead) ✕

Process Helper

admin (Administrator) has executed the action: about Davis Jennifer (Lead)

> Details

Logs

admin (Administrator) passed in this activity from the BPMN-Task: Lead to convert
4 minutes ago

admin (Administrator) end the activity BPMN-UserTask: Request details
4 minutes ago

With a user with Administrator permissions, it is possible to perform direct maintenance on a single process instance by being able to move the point of execution of the flow forward (to avoid the execution of some Tasks/Action Tasks) or backward (to re-execute some Tasks/Action Tasks).

To proceed with these operations, you must click on “Force position” (Figure 8), then on the Task/Action Task on which you want to position the process (Figure 9), then on “OK” in the confirmation popup (Figure 10), then on “Continue execution” (Figure 11) and finally on “OK” in the confirmation popup (Figure 12).

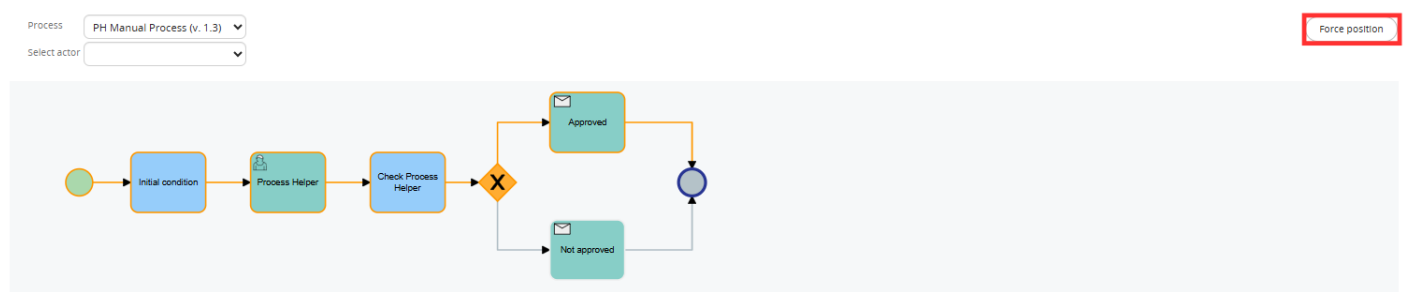


Figure 8

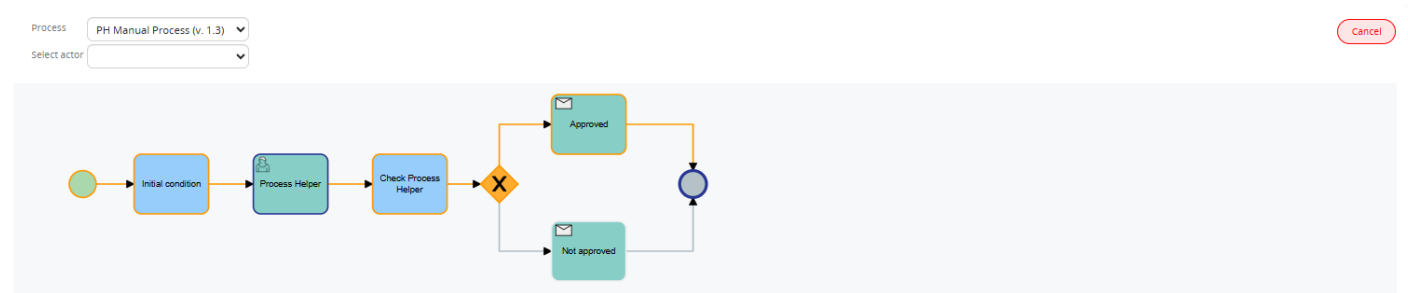


Figure 9

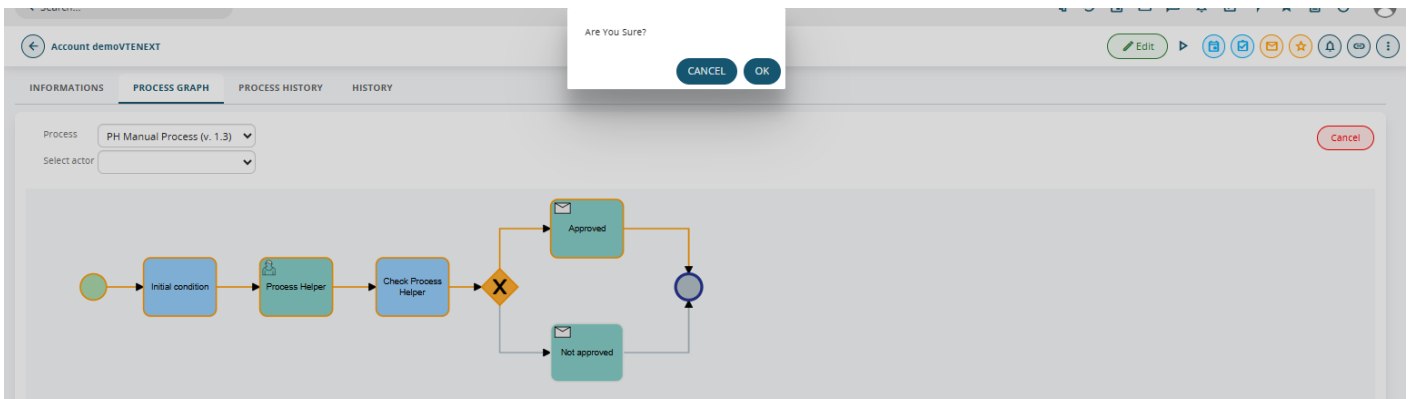


Figure 10

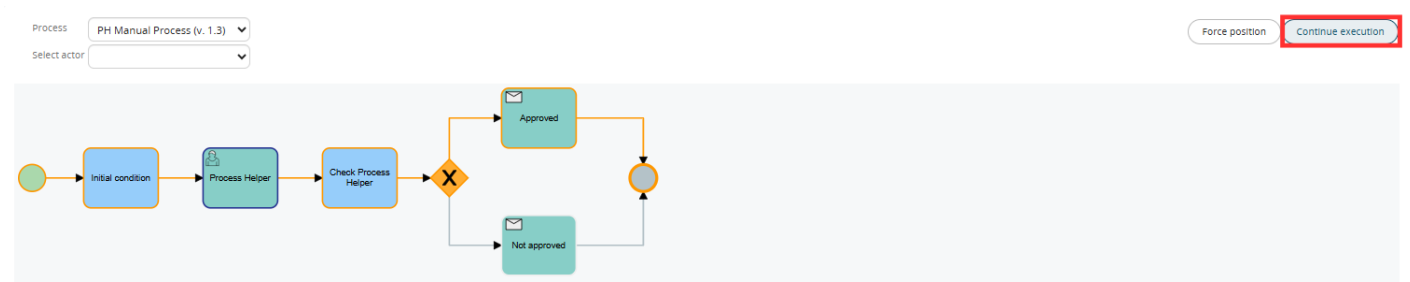


Figure 11

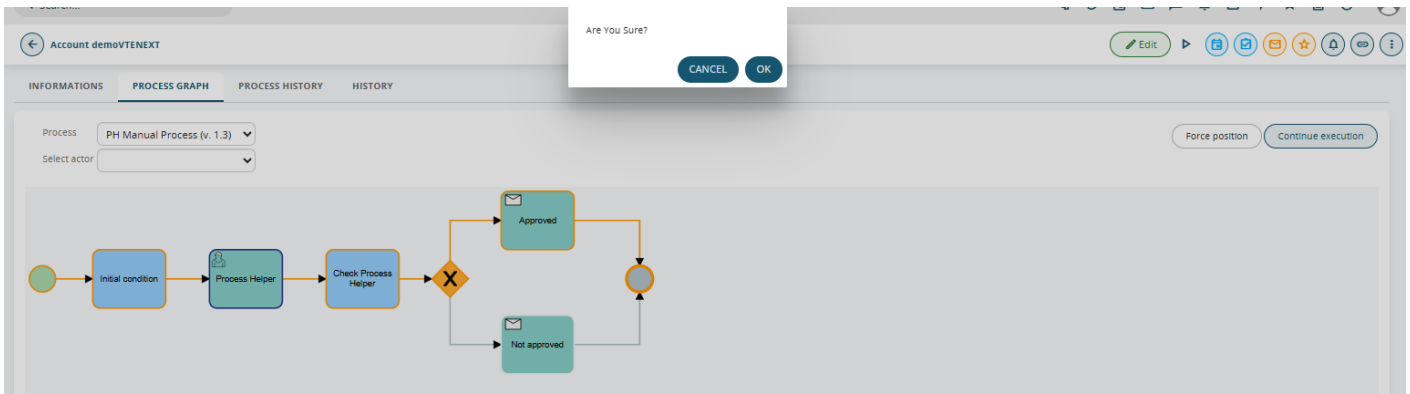


Figure 12

In the re-executed Tasks/Action Tasks it is reported whether the execution was performed through a position force or not (Figure 13)

-  **admin@vtenext.com (User)** passed in this activity from the **BPMN-EndEvent** (Manually changed position) 4 minutes ago
-  **admin@vtenext.com (User)** end the activity **BPMN-UserTask: Process Helper** 2 seconds ago

Figure 13

It is recommended to configure the aforementioned Process helper inside an Action Task inserted immediately after the Initial Condition Task to ensure that the graph is activated a few moments after the actual start of the process (Figure 14).

