Informatica® Human Tasks
May 2023

Working with Human Tasks

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Preface

Read *Working with Human Tasks* to learn about the Human Task Inbox. You can use the Human Task Inbox to view the human tasks assigned to you and take appropriate actions.

This guide assumes that you have an understanding of how to create assets such as processes and guides in Application Integration.

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Working with Human Tasks

When an Application Integration process generates a human task and you are assigned to work on the task, the task appears in the Human Task Inbox. Based on your user role, some tasks might require you to do some work and other tasks might require you to monitor or reassign them to other users.

Your user account or role needs to be listed in the **Potential Owners** field during the human task asset creation in Application Integration so that you can access the task. You can perform the following operations to access the tasks in the inbox:
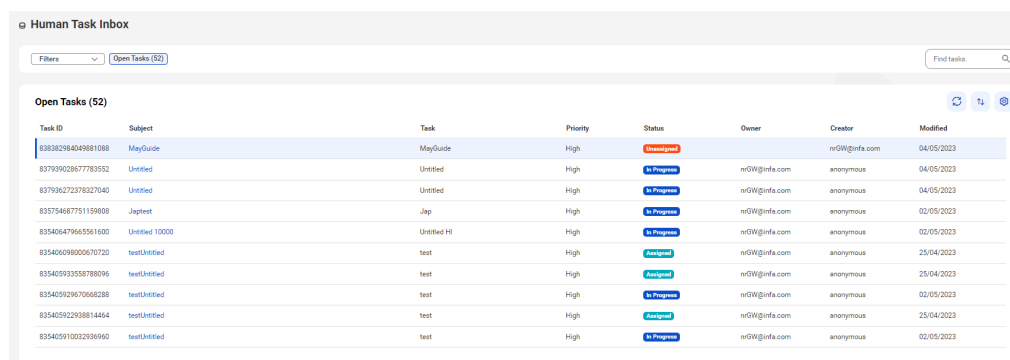
- Select the **List View** or **Grid View** layout to view the task list.
- Use **Quick Filters** to filter unassigned tasks, tasks assigned to you, active tasks, closed tasks, and open admin tasks.
- Use **Search** to search for tasks based on the task name, subject, display name, and so on.
- Sort and refresh tasks.
- View details of a specific task.

When you click the **Select List View or Grid View** icon in the inbox, a list appears displaying the **Grid View** and **List View** options.

Grid View

> The **Grid View** layout presents task information in rows and columns across the Human Task Inbox.
>
> The following image shows the Human Task Inbox in the grid view layout:

> When you select **Grid View**, the following columns are displayed:
>
> - **Task ID**. Uniquely identifies the task.
> - **Subject**. Introduces the task.
> - **Task**. Displays the name of the task.

- **Priority**. Indicates the level of importance of the human task created by the Application Integration process. The lesser the number, the higher the priority.
- **Status**. Indicates the state the task is in. The **Status** field can have one of the following values:
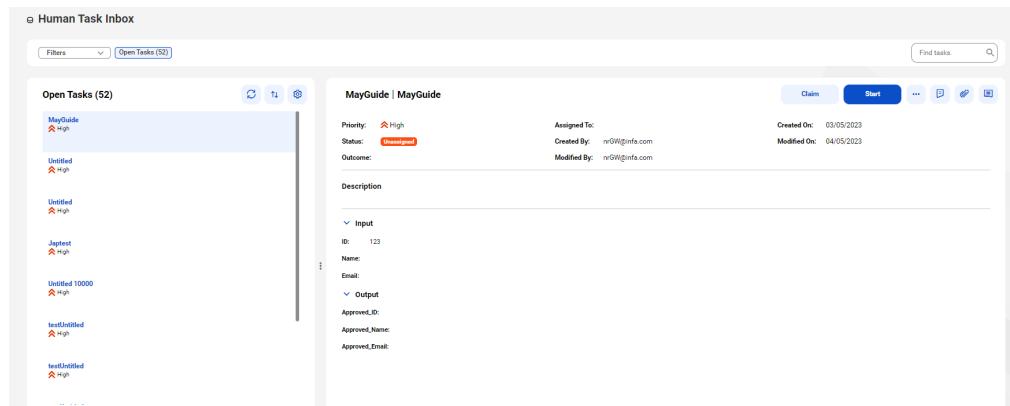
Task Status	Description
Assigned	Indicates that the task is claimed by a task owner.
InProgress	Indicates that the task owner has started working on the task.
Unassigned	Indicates that the task is unclaimed by any potential owner.
Completed	Indicates that the task owner has completed the task.
Created	Indicates that the task is newly created.
Suspended	Indicates that the task is temporarily suspended.
Obsolete	Indicates that the task is suspended.
Failed	Indicates that the task was failed explicitly through an API call.
Exited	Indicates that the task is exited.
Error	Indicates that the task encountered an error.

- **Owner**. Displays the name of the user who claimed the task.
- **Creator**. Displays the name of the allowed users configured for the task in the Human Task step.
- **Due Date**. Reserved for future use.
- **Start By Date**. Displays the date when the task was initiated.
- **Modified**. Displays the date when the task was modified last.
- **Origin**. Reserved for future use.

List View

The **List View** layout presents all the user tasks as a vertical scrollable list. Click a task on the task panel on the left side to view the task details. The task details appear on the task review panel on the right side.

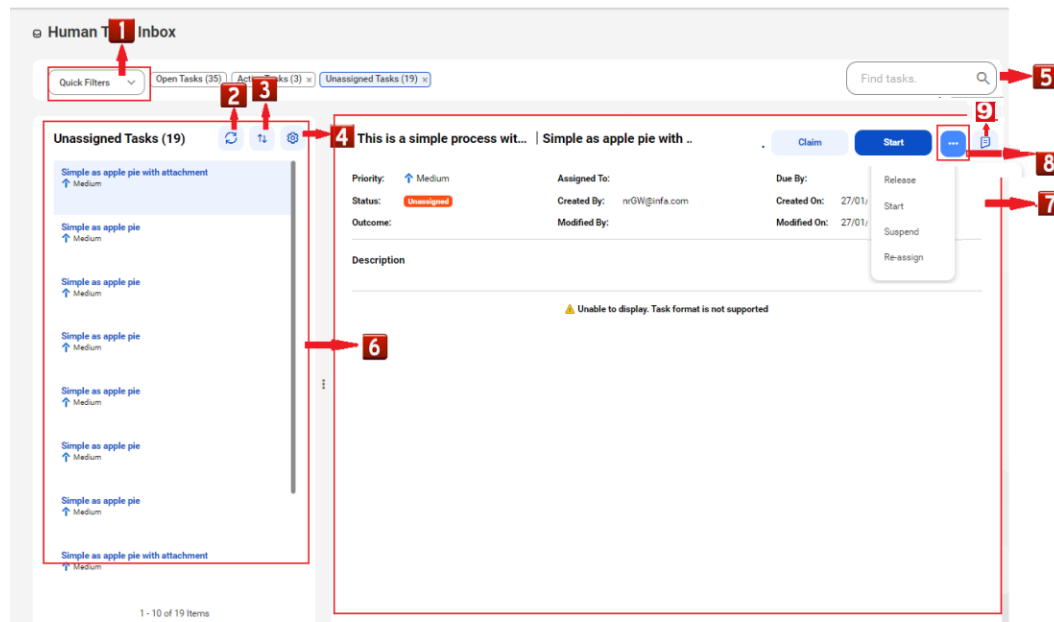The following image shows the Human Task Inbox in the list view layout:

When you select **List View**, in addition to the task subject and task name, you can view the following details on the task review panel:

- **Priority**. Indicates the level of importance of the human task created by the process. The lesser the number, the higher the priority.

- **Status**. Indicates the state the task is in.

- **Assigned To**. Displays the name of the user who claims the task.

- **Created By**. Displays the name of the user who created the task.

- **Created On**. Displays the date when the task was created.

- **Modified On**. Displays the date when the task was modified.

- **Due Date**. Reserved for future use.

- **Modified By**. Displays the name of the user who last modified the task.

- **Outcome**. Displays the decision taken on the task.

Human Task Inbox User Interface

The Human Task Inbox user interface is an interactive application that the assigned users use to view and work on a task.

The following image shows the user interface of the Human Task Inbox:

The following list describes the various components in the Human Task Inbox:

1. **Quick Filters**. The **Quick Filters** option allows you to filter the collection of tasks appearing in the Human Task Inbox. Use **Quick Filters** to switch between different task types such as the **Unassigned Tasks**, **My Tasks**, **Active Tasks**, **Closed Tasks**, **Open Admin Tasks**, and **My Stakeholder Tasks**.

2. **Refresh**. Click **Refresh** to refresh the list of tasks in the Human Task Inbox.

3. **Sort**. Click **Sort** to sort the list of tasks by task subject or task priority.

4. **Select List View or Grid View**. Click **Select List View or Grid View** to select the grid view layout or list view layout.

5. **Find tasks**. In the **Find tasks** field, you can search for a specific task using the task name, task ID, or subject.

6. **Task panel**. The task panel lists the tasks. You can use **Quick Filters** to select the type of tasks that you want to view in the task panel.

7. **Review panel**. Use the review panel to view the task record and work on the task. The content of the review panel differs based on the type of change that was made to the record.

8. **Actions**. Click the **Actions** menu to view the list of actions that you can perform on a task.

9. **View Task Details**. Click the **View Task Details** icon to view details on user that created the task, task assignee name, due date to complete the task, task status, and task priority.

Viewing tasks

In the Human Task Inbox, you can view tasks in a grid view layout or a list view layout.

The Grid View layout displays task details in rows and columns across the Human Task Inbox. The List View layout displays all the tasks as a vertical scrollable list. You can click a task on the task panel on the left side to view its details on the task review panel on the right side.

1. Click the **Human Task Inbox**.

   The task panel appears displaying a list of tasks.

2. Click the **Select List View or Grid View** icon above the task panel.

3. Perform one of the following steps:

   - To view tasks in a grid view layout, select **Grid View** from the list.
   - To view tasks in a list view layout, select **List View** from the list.

Claiming a task

When a task has a single potential owner, it is assigned to the potential owner and the task transitions into the **Assigned** status. When a task has multiple potential owners, the task transitions into the **Unassigned** status, indicating that it must be claimed by one of its potential owners.

As a potential owner, you must claim a task to take ownership of the task. After you claim a task, you become the task owner and the task can't be claimed by other potential owners.

1. Click the **Human Task Inbox**.

   The task panel appears displaying a list of tasks.

2. In the task panel, select **Unassigned Tasks** from the **Quick Filters** list.

   The task panel lists all the unclaimed tasks specific to your user account or role.

3. Select a task that you want to claim.

   The task record appears in the review panel.

4. Click **Claim**.

   The task is assigned to you. Your name appears in the **Assigned To** field of the task and the value of the **Status** field changes to **Assigned**.

Starting a task

After you claim a task, you can start working on a task. After you click **Start**, the review panel displays the fields that require your input.

1. Click the **Human Task Inbox**.

   The task panel appears displaying a list of tasks.

2. Click the task that you want to start.

   The task record appears in the review panel.

3. Click **Start**.

The task status changes to **In Progress**. The review panel displays the fields that need your input.

4. Review the task and take an action.

Reviewing and resolving a task

Human tasks require human approvals before a process can proceed with its execution. The approval permissions are restricted to the task owners. After a task owner resolves a task, the process continues to the next step. If a task uses a guide, the outcomes are available on the task wizard for the task owner to update.

1. Click the **Human Task Inbox**.

The task panel appears displaying a list of tasks.

2. Click the task that you want to review.

The task record appears in the review panel.

3. Review the task details.

4. Perform one of the following steps:

- If the task uses a guide, select a task outcome to complete the task.
- If the task does not use a guide, you must manually complete the task.

Completing a task

You can manually complete a task that uses the default rendering. The **Complete** option is available only for tasks that use the default rendering. To complete a task that uses a guide, you must perform all the required actions prompted by the guide.

To complete a task that uses the default rendering, perform the following steps:

1. Click the **Human Task Inbox**.

The task panel appears displaying a list of tasks.

2. Click the task that you want to complete.

The task record appears in the review panel.

3. Click **Complete**.

Suspending a task

You can suspend a human task if you want to resume it later. You cannot perform actions on a suspended task. You must resume a suspended task to perform further actions on the task.

1. Click the **Human Task Inbox**.

The task panel appears displaying a list of tasks.

2. Click the task that you want to suspend.

   The task record appears in the review panel.

3. Click the **Actions** menu, and then click **Suspend**.

   In the task review panel, the status of the task changes to **Suspended**.

Resuming a task

When you resume a task that was suspended earlier, the task restarts from the same state where it was stopped. You can perform further actions on a suspended task only after you resume the task.

1. Click the **Human Task Inbox**.

   The task panel appears displaying a list of tasks.

2. Click the suspended task that you want to resume.

   The task record appears in the review panel.

3. Click **Resume**.

   You can perform further actions on the task.

Skipping a task

You can skip a human task if it is not critical or is no longer needed. Skipping a task makes the task obsolete. As a task owner, you can skip a task only if the **Skippable** option was enabled during the human task asset creation in Application Integration.

1. Click the **Human Task Inbox**.

   The task panel appears displaying a list of tasks.

2. Click the task that you want to skip.

   The task panel appears displaying a list of tasks.

3. Click the **Actions** menu, and then click **Skip**.

   The task status changes to **Skipped**.

Stopping a task

You can stop a human task from running either manually or by completing the task.

1. Click the **Human Task Inbox**.

   The task panel appears displaying a list of tasks.

2. Click the task that you want to stop.

   The task record appears in the review panel.

3.   Click **Stop**.

The task execution stops. You can then release, start, or suspend the task.

Releasing a task

When you release a task, the task returns to the **Unassigned** status. The task can then be claimed by users or groups that are listed as potential owners in the human task asset.

1.   Click the **Human Task Inbox**.

The task panel appears displaying a list of tasks.

2.   Click the claimed task that you want to release.

The task record appears in the review panel.

3.   Click **Release**.

The task status changes to **Unassigned** and other potential owners can claim the task.

Reassigning a task

Administrators that are defined during the human task asset creation in Application Integration can reassign a task to another user. For example, if a task owner is unavailable, an administrator can reassign the task to another user. After a is task reassigned, the responsibility and ownership for the task is with the user to whom the task is reassigned.

1.   Click the **Human Task Inbox**.

The task panel appears displaying a list of tasks.

2.   Click the task that you want to reassign.

The task record appears in the review panel.

3.   Click the **Actions** menu, and then click **Reassign**.

4.   Type the assignee name or select a new assignee from the **Assign To** list.

5.   Click **Assign**.

The task is reassigned to the user selected in the **Assign To** field.