Informatica® Human Tasks
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Introducing Human Tasks

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Preface

Read *Introducing Human Tasks* to get an overview of the Human Tasks service and learn about human tasks.

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

CHAPTER 1

Introducing Human Tasks

Human Tasks is a service in Informatica Intelligent Cloud Services℠. The Human Tasks service displays a Human Task Inbox. You can use the inbox to view the human tasks assigned to you and take appropriate actions.

When you log in to Informatica Intelligent Cloud Services, the **My Services** page displays the Human Tasks service and the services that apply to human tasks. The **My Services** page might also include other services that you subscribe to and trial versions of other services. The following services apply to the Human Tasks service:

- Application Integration. Create a human task asset in Application Integration and add it to a process by using the Human Task step.
- Administrator. Perform administrative tasks such as creating users and managing privileges, and managing licenses.

The Human Tasks service integrates with the Application Integration service of Informatica Intelligent Cloud Services. You can use Application Integration to design, integrate, and implement business processes spanning different cloud and on-premises applications. A human intervention becomes necessary in business processes where a decision needs to be taken. For example, a human action is required for approvals and exception management. In such cases, you can use a human task. A human task needs a human intervention to get completed.

You first configure the human task asset in Application Integration. The asset defines the human task, the users and roles that will have access to the human task, and the task outcome. You can add the human task asset to an Application Integration process by using a Human Task step. When the process runs, the human task that gets generated is sent to the Human Task Inbox of the Human Tasks service. Based on the role assigned to you, you can use the Human Task Inbox to view the tasks assigned to you and take appropriate actions. For more information about the human task asset and step, see the *Application Integration Design Guide*.

The Human Tasks service provides the following features:

- Human interactions within a process, including assignment of tasks to the appropriate users or roles
- Notifications related to changes in the task
- Prioritization, sorting, and filtering that are needed for the task owners to perform their tasks efficiently
- Reassignment of tasks by administrators and stakeholders to ensure timely completion of human tasks

Example

You want to create a loan approval process. The process must allow a requestor to submit a loan application. The request is assigned to a bank employee or loan agent qualified to approve or reject the request based on various evaluation criteria. A human user then reviews, and approves or rejects the application. If the loan is approved, the loan is sanctioned to the requestor.

To achieve this use case, you perform the following tasks in Informatica Intelligent Cloud Services:

1. Create a loan approval process in Application Integration.
2. Create a human task asset in Application Integration. The asset defines the human task details.
3. Add a Human Task step to the process to include the human task asset and task.
4. When the process runs, it sends the task to the Human Task Inbox of the Human Tasks service.
5. The potential owners, administrators, and stakeholders that are defined in the human task asset can see the human task when they open the Human Task Inbox in the Human Tasks service.
6. The listed potential owners can claim the task. The user claiming the task becomes the task owner who can perform further actions on the task.
7. The task owner analyzes the loan application, approves or rejects the loan application, and completes the human task.
8. The process then continues to the next step in Application Integration and the loan is sanctioned to the requestor.

Note: Human Tasks is available for preview. Preview functionality is supported for evaluation purposes but is unwarranted and is not supported in production environments or any environment that you plan to push to production. Informatica intends to include the preview functionality in an upcoming release for production use, but might choose not to in accordance with changing market or technical circumstances. Note that if you are working on a preview POD, all data is excluded from SOC 2 compliance coverage. For more information, contact Informatica Global Customer Support.

User roles for Human Tasks

A human task needs human intervention to get completed. When you create a human task asset in Application Integration, you assign users or roles to monitor and act upon the task. The actions that can be performed on a task vary based on the privileges assigned to a specific user or role.

You can configure the following roles for human tasks:

Task Owner

> A task owner is the user that is assigned the task and can perform actions on it. The task owner can start, stop, suspend, resume, release, and complete a task.

Potential Owners

> A potential owner can become the actual owner of a task and belong to a user group that can work on a task. When a task is generated, all the potential owners can view the task. A potential owner can claim a task. After a task is claimed by a potential owner, the potential owner becomes the task owner, and the task can't be claimed by other potential owners.

> A potential owner can claim, start, stop, suspend, resume, release, and complete a task.

Excluded Owners

> Excluded owners are the users or roles that are excluded from processing a human task. Excluded owners can't access, own, or perform any action on a task.

Administrators

> Administrators are the users or roles that are authorized to assign and reassign tasks.

Stakeholders

Stakeholders are the users or roles that can oversee tasks and take necessary actions when a problem arises. Stakeholders can monitor the actions taken on a task by a task owner, claim a task, and reassign a task to another user when needed. A task can have multiple stakeholders.

Lifecycle of Human Tasks

The lifecycle of a human task involves status and actions. The actions that can be used to interact with the human task can change its status.

When you click the **Actions** menu in the task inbox, you can view all the possible actions that can be performed on the task. The status of the task is indicated in the **Status** column.

The human tasks that are created by the Application Integration process pass through the following phases:

- The human task is defined in the human task asset created in Application Integration.
- The task is used in the Human Task step so that the process initiates the task to be sent to the Human Task Inbox. For more information about the human task asset and step, see the *Application Integration Design Guide*.
- The potential owners, administrators, and stakeholders view the task in the Human Task Inbox.
- The listed potential owners can claim the task. The user claiming the task becomes the task owner who can release, start, or suspend the task.
- Based on the task analysis, the owner then reviews and completes the task.

A task owner can perform the following actions on the tasks that appear in the Human Task Inbox:

Claim a task

Potential owners that are defined in the human task asset receive the task so that they can claim and complete it. A potential owner becomes the task owner by explicitly claiming the task. After a potential owner claims a task, it can't be claimed by other potential owners.

Start a task

When a task is generated by the Application Integration process and you are assigned to work on it, the task appears in the inbox. After you claim an assigned task, you can start working on it.

Review and complete a task

As a task owner, you can review and complete a task. 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.

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.

Suspend 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.

Resume 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.

Skip 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.

Stop a task

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

Release 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.

Reassign 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.

Human task expiration

A human task that is inactive or unattended for 30 days from the date of task creation expires and gets closed automatically. The task gets purged after 3 days from the expiration date.

The parent process that includes the inactive human task will continue to execute the next step thereby reducing the process execution time. Expiration occurs in the following scenarios:

1. Unclaimed or unassigned human tasks that remain in the same state for more than 30 days
2. Human tasks that remain in the **In Progress** state for 30 days

Guide-rendered tasks

Guide-rendered tasks provide the user with a wizard that guides the task owner to enter data and complete a task.

A guide is a set of screens that prompts users to review, enter, or confirm data. You create a guide in Application Integration. When you create a human task asset in Application Integration, you can choose to use a guide to display a wizard for task owners' ease.

For example, a step might display a loan application or prompt the user to approve a loan amount that is requested by a customer. The steps in a guide interact with your application by extracting and storing data. Guides run within mobile apps or on traditional platforms such as a PC or a Mac.

If you select a guide at the time of creating a human task asset in Application Integration, the task in the inbox uses the screens configured in the guide to display data. If you do not select a guide at the time of creating a human task, the task uses the default rendering.