**FireStart**

Advanced Modeling ⌄

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Assign References to Tasks

This is especially important for executing workflows where other models are needed, e.g., a role model to send the tasks to specific people. The basic procedure to add a model to a task is quite the same as most of the other models. Therefore, it is explained once, and can be done for every following model:

- Role Model

- Domain Model
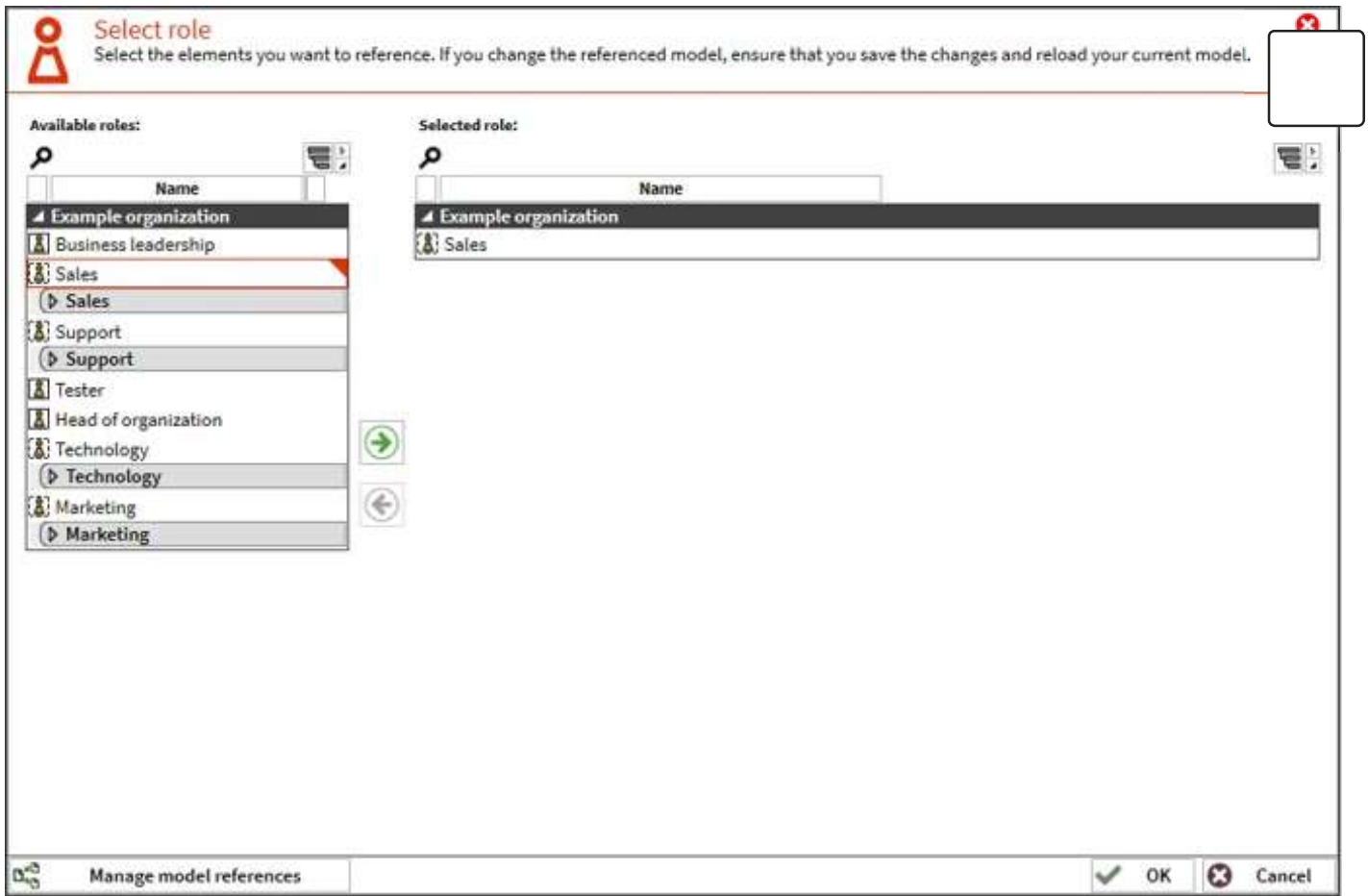
- IT-System Model

- Risk Model

- Document Model

Basic Assigning Procedure

The procedure will be explained with a role model as an example. First off you have to open the **Quad Menu** with a right-click on the specified task. In the **Add** section, all the different parts you can add to the task are now displayed. You can either choose the one you want, or you click any of these and change the type in the opening top dialog (2 dialogs will open).
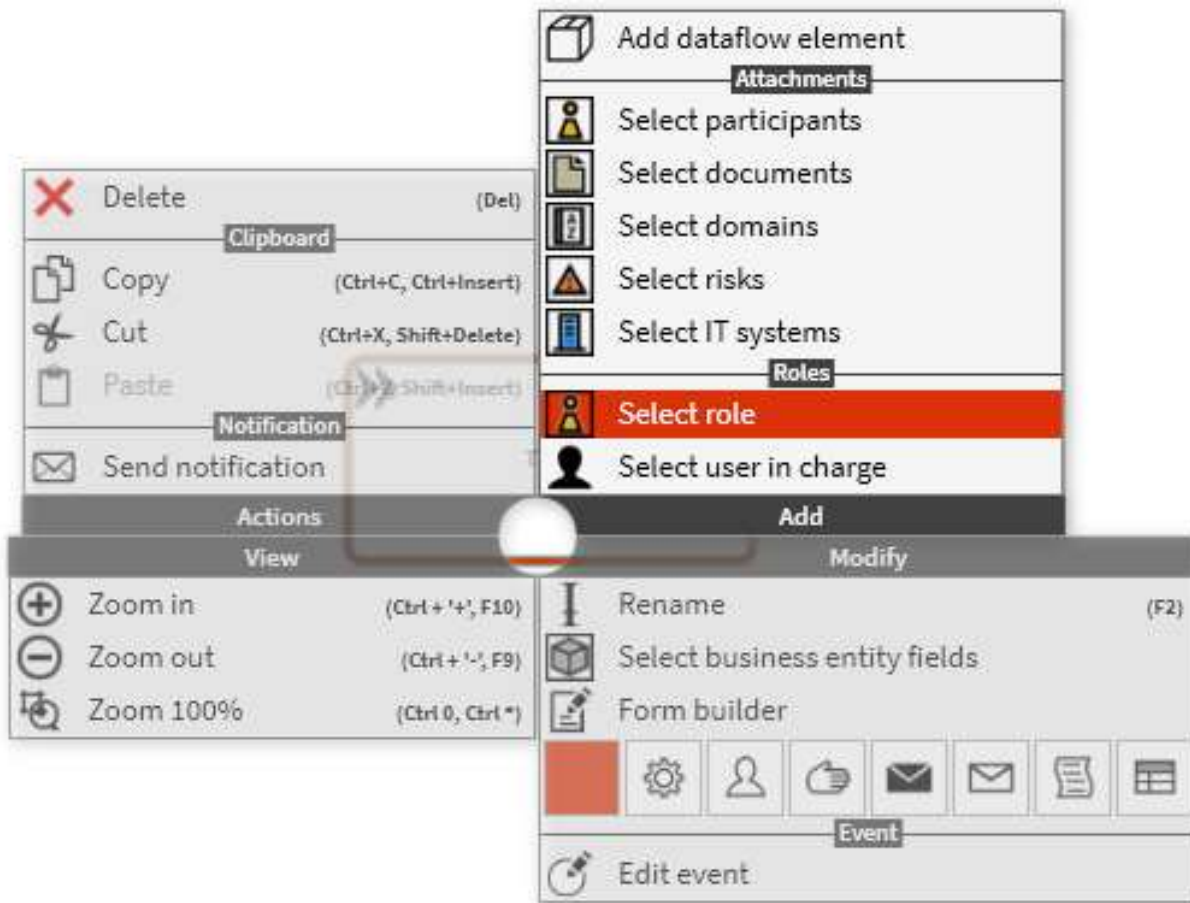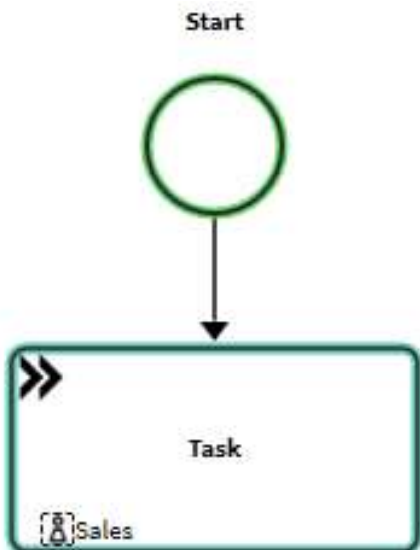
By clicking one of these icons, the displayed models change.

Double-click the model you wish to add and then save it with a click on **OK.** The dialog closes and the chosen model is preselected so all available roles in this model are displayed. By double-clicking the role, you add it. Click **OK** to save.

Select role
Select the elements you want to reference. If you change the referenced model, ensure that you save the changes and reload your current model.

Available roles:

Name
▲ Example organization
Business leadership
Sales
▷ Sales
Support
▷ Support
Tester
Head of organization
Technology
▷ Technology
Marketing
▷ Marketing

Selected role:

Name
▲ Example organization
Sales

Manage model references   ✔ OK   ❌ Cancel

After finishing the task looks like this:

Start

Task

Sales

The role is displayed directly in the task, but the other added things like documents or risks will be displayed as an attachment. With the other models, you also have the possibility to declare them as in- or output, which changes the way it will be displayed after adding.
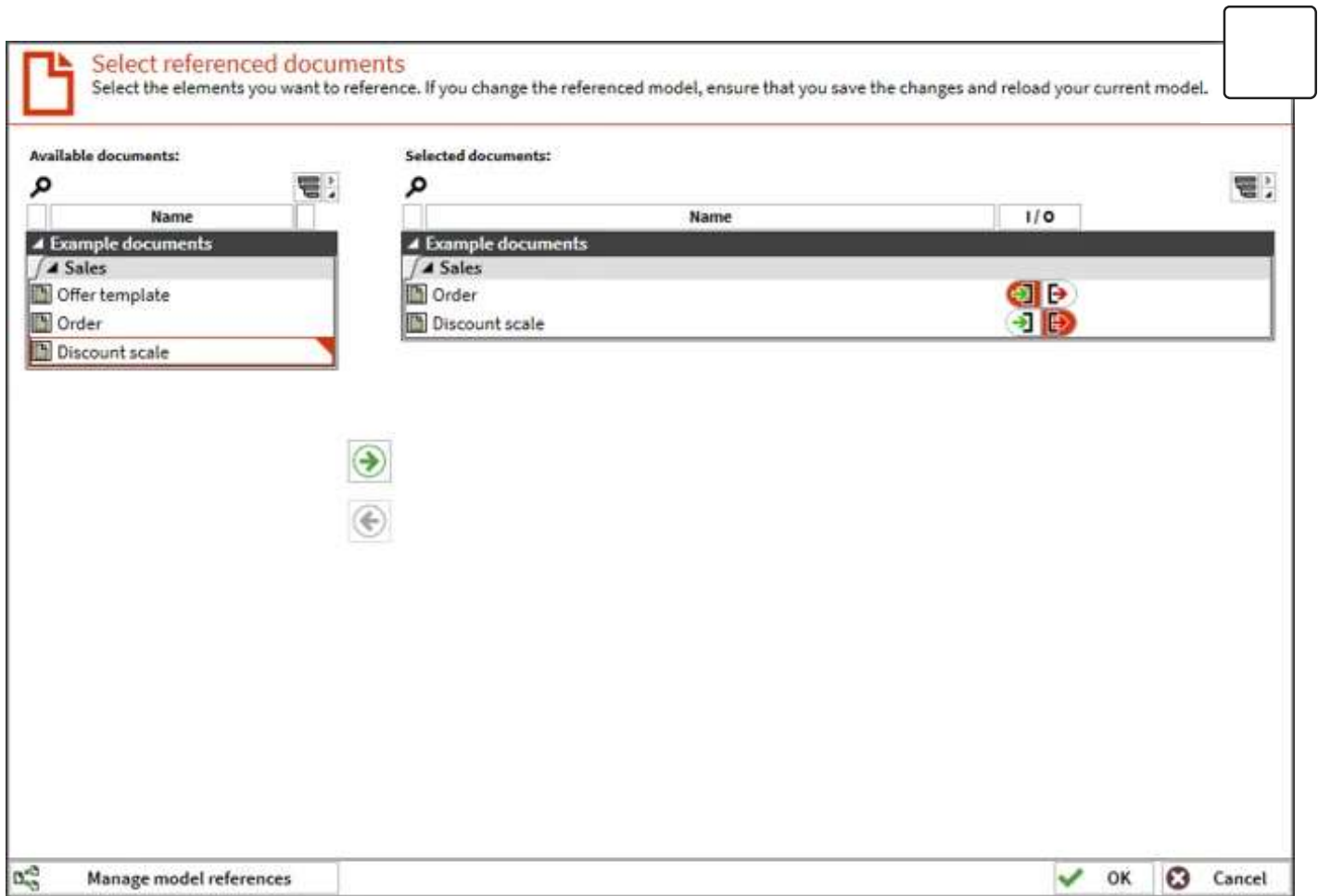
Select User in Charge

If you need a specific person to get the tasks you can also define them with the **Select User in Charge** functionality. You might now think if it is possible that way why do I even use a role model? This question can be answered easily. You mostly don't use a role model just once if it is properly structured and reflects your intern organization. So if you have a role model for specific departments in your company then you just have to add that role model and not a single user. So with **Select User in Charge** you have to add a user for every task who needs them again. In addition to that, it is only possible to select one user in charge.

To do so, you have to open the **Quad Menu** of the task and choose **Select User in Charge.** There are two different ways to add a **User in Charge** you

can either select them from the **Active Directory** or you add a dynamic user. The dynamic user will only be known for the execution, which means you have a process where the supervisor of an employee should be notified. The supervisor can be different for any employee, so the responsible supervisor is stored in a field. That field can be selected when configuring the user in charge.
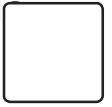
> **Note:** If there is no specific user assigned to a task or any other element, then the users of the assigned role will be used for sending tasks.

Add an Active Directory User

Enter at least 3 letters of the name or username of the user you want to add. With pressing the **Return** key, you will see if there are any users who fit the typed name. Select one and click **OK** to save.

Select user in charge

Dynamic matching of business entity field resource and active directory: If there is no matchi
user name, the process owner has to set the resource manually.

From directory	Dynamic

🔍

	Name	Login name	

Server-side quicksearch is enabled. Please enter 3 or more characters and accept with return.
Fields: name, login name, token

Send information mail to these email addresses:

👤 Remove user in charge	📦 Business Entity Fields	✓ OK	✗ Cancel

With the **Send information mail to these email addresses** option, you are able to send the task to the entered email addresses.

Add a Dynamic User

To add a dynamic user, you have to switch to the **Dynamic** tab and choose whether the **User name** or the **Email address** is contained in the field. You can now choose the field with the user data in it from the

already added business entity or workflow variables. If there are none of these existent, you can manage **Business Entity Fields** by clicking on the equally named button.

In the dialog are a few other things you can configure, such as the deployment of the task if the selected user doesn't exist.

There is also the possibility to specify multiple dynamic users, by selecting the checkbox Deploy task to multiple users and define a separator (in case you do not define a separator ';' will be used by default). Upon deployment, all values provided will be resolved to users and groups as they would for a single user and the task will be deployed to all resolved users.

Select user in charge

Dynamic matching of business entity field resource and active directory: If there is no match user name, the process owner has to set the resource manually.

| From directory | Dynamic |

User Properties:

🔍

◢ User properties
Email address
User name

Business entity field:

🔍

◢
users

☐ Override business entity field with actual user ID
☐ Deploy task to selected role if dynamic user does not exist
☑ Deploy task to multiple users

Separator:

,

Send information mail to these email addresses:

| 👤 | Remove user in charge | 📦 | Business Entity Fields | ✓ | OK | ✗ | Cancel |

Select Participants

Participants are only for modeling purposes, they have no deeper meaning. If a participant is assigned to a task it only shows how the specified role is concerned of that task, but other than that it doesn't mean that there is also sent the task to this user. With adding a participant you can specify which responsibility the participants have in form of the **RACI** model.
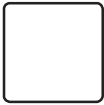
- R = Responsible

- A = Accountant

- C = Consulted

- I = Informed

To add a participant right-click a task and choose the **Select Participants**. All available and referenced roles will be displayed and can be added with double-clicking the name. Now you can enter the responsibility of the role and save with clicking the **OK** button.