Contents

Chapter 1 / Managing Permissions .......................................................... 1
    Granting Permission to Work with Definitions .................................. 1
    Granting Permission to Work with Instances .................................. 1

Chapter 2 / Managing Workflow Instances ............................................ 3
    About Workflow Instances ........................................................... 3
    View Workflow Instance Details .................................................. 4

Chapter 3 / Viewing and Managing Additional Details for Workflow Instances ........................................... 7
    Viewing Details ........................................................................... 7
    Managing Details ........................................................................ 8
Managing Permissions

Granting Permission to Work with Definitions

In order to administer workflow instances in SAS Workflow Manager, your ID must be a member of the Application Administrators group. By default, the user who creates a workflow definition also has administrative permission on that definition. That user can modify, delete, and enable that workflow definition. That user can also give other users permission to work with the definition. For more information, see “Manage Permissions for a Definition” in SAS Workflow Manager: User’s Guide.

Granting Permission to Work with Instances

In order to administer workflow instances in SAS Workflow Manager, your ID must be a member of the Application Administrators group. Members of this group can perform the following tasks:

- view and terminate workflow instances
- transfer tasks from one participant to another

You use SAS Environment Manager to manage identities and group membership for applications that run on SAS Viya. Information is available in the SAS Viya administration documentation:

- “Two Authorization Systems” in SAS Viya Administration: Orientation to Authorization
- “Identity Management: Overview” in SAS Viya Administration: Identity Management
- “Predefined Custom Groups” in SAS Viya Administration: Identity Management
- “Manage Custom Groups” in SAS Viya Administration: Identity Management
Managing Workflow Instances

About Workflow Instances

Note: Before an authenticated user can view workflow instances in SAS Workflow Manager, you must give that user the appropriate permissions. For more information, see “Granting Permission to Work with Instances” on page 1.

Click on the navigation bar to access the Instances view. All workflow instances are displayed in this view. Twenty instances are shown per page.

The Instances view contains a table that details the following:
- name of the workflow instances
- version of the workflow instances
- status of the workflow instances
- status date for the workflow instances
- the date on which the workflow instances were created
- the user that created the workflow instances

Each workflow instance displays a status in the Instances view.

Table 2.1 Statuses for Workflow Instances

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Progress</td>
<td>The workflow instance is currently running.</td>
</tr>
<tr>
<td>Completed</td>
<td>The workflow instance has completed and is no longer running.</td>
</tr>
<tr>
<td>Terminated</td>
<td>The workflow instance was terminated.</td>
</tr>
<tr>
<td>Suspended</td>
<td>The workflow instance was suspended. The workflow instance can be resumed or terminated from this state.</td>
</tr>
</tbody>
</table>
Note: Only workflow instances with an In Progress status can be terminated from the Instances view. In the Instances view, select the instance that you want to terminate and click Terminate to terminate the workflow instance.

View Workflow Instance Details

In the Instances view, you can access additional details about workflow instances. Double-click on the workflow instance name or click ⬇️ in the upper right hand corner to open additional details about the selected workflow instance.

A tasks table displays the following details about each task in the workflow instance:

- the name of the task in the workflow instance
- the status of the task in the workflow instance
- the name of the user that has claimed the task in the workflow instance
- any prompts related to the task in the workflow instance
- the time at which the task was started in the workflow instance
- the time at which the task completed in the workflow instance
- the type of element in the workflow instance

Click on each individual element in the tasks table to highlight the element and view additional details. You can compress the tasks table by clicking ‹ and expand it by clicking › next to Tasks.

Each element displays a status in the tasks table.

Table 2.2  Element Statuses for Workflow Tasks

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Started</td>
<td>The task has been identified by a definition, but not started.</td>
</tr>
<tr>
<td>Started</td>
<td>The task has been started.</td>
</tr>
<tr>
<td>Completed</td>
<td>The task has been completed and the underlying execution has moved to the next sequential task in the workflow instance.</td>
</tr>
<tr>
<td>Terminated</td>
<td>The task has been canceled. If a workflow instance is terminated, all active tasks are canceled.</td>
</tr>
<tr>
<td>Claimed</td>
<td>A user task has been updated and an owner value has been set, or the participants have been updated.</td>
</tr>
<tr>
<td>Released</td>
<td>A user task owner has been relinquished or participants have been removed.</td>
</tr>
<tr>
<td>Delegated</td>
<td>A user task has been delegated to another user by the task owner.</td>
</tr>
<tr>
<td>Transferred</td>
<td>A user task has been transferred to another user by the task owner.</td>
</tr>
</tbody>
</table>
You can also click through the workflow diagram to access and view additional details. Workflow element statuses are indicated by color highlighting.

Table 2.3  Corresponding Colors for Element Statuses in Workflow Diagrams

<table>
<thead>
<tr>
<th>Status</th>
<th>Corresponding Color</th>
</tr>
</thead>
<tbody>
<tr>
<td>Started</td>
<td>Brown</td>
</tr>
<tr>
<td>Completed</td>
<td>Green</td>
</tr>
<tr>
<td>Terminated</td>
<td>Blue</td>
</tr>
<tr>
<td>Claimed</td>
<td>Red</td>
</tr>
<tr>
<td>Canceled</td>
<td>Yellow</td>
</tr>
</tbody>
</table>
Viewing and Managing Additional Details for Workflow Instances

**Viewing Details**

- **View Properties** .......................................................... 7
  - The Properties pane is available for all elements in a workflow.
  - The Properties pane displays the general property information for the selected element. You cannot make any modifications in this pane.

- **View the Sequence Flow Condition** ................................ 7
  - The Condition pane is available if a sequence flow element is present in the workflow.
  - The Condition pane lists any condition that corresponds to the selected sequence flow in a workflow instance. You cannot make any modifications in this pane.

- **View Gateway Conditions** ........................................... 7
  - The Conditions pane is available when a gateway is present within the workflow.
  - The Conditions pane lists all gateway conditions for a selected gateway within the workflow instance. You cannot make any modifications in this pane.

**Managing Details**

- **Manage Data Objects** .................................................. 8
- **Manage Participants** .................................................... 8
- **Manage Boundary Task Lists** ...................................... 8
Managing Details

Manage Data Objects

Click to access the Data Objects pane.

In the Data Objects pane, you can access data objects if a current process, subprocess, or call activity is present within a workflow task. If the task is In Progress, you can modify values in this pane. Expand the Data Objects pane by clicking , and compress it by clicking next to each data object.

Manage Participants

Click to access the Participants pane. The Participants pane is available when a user task element is present in the workflow.

If a workflow instance is In Progress, you can add and remove participants from the Participants pane by selecting a user task in the workflow diagram or in the tasks table.

- Click to add a participant. Click to select a user identity to add. Then, click OK.
- Click on the participants name in the Participants pane and click to remove the participant. Click Yes in the prompt window to remove the participant or click No to cancel the removal.

If a workflow task is In Progress, you can transfer ownership in the Participants pane. Click Transfer to transfer the task to another user. Click to select a user from the user identity list. Click Save. Click Yes to transfer the task to the selected user or click No to cancel the transfer.

Manage Boundary Task Lists

Click to access the Boundary Tasks pane. The Boundary Tasks pane is available when subprocesses are present in the workflow.