Process Cloud Service

Sales Consultant Training

Purchase Requisition Workspace Run-Time

Lab Document

# Introduction

This lab is for getting to know the PCS workspace. The Purchase Requisition PCS application will be used as an example.

# Setup

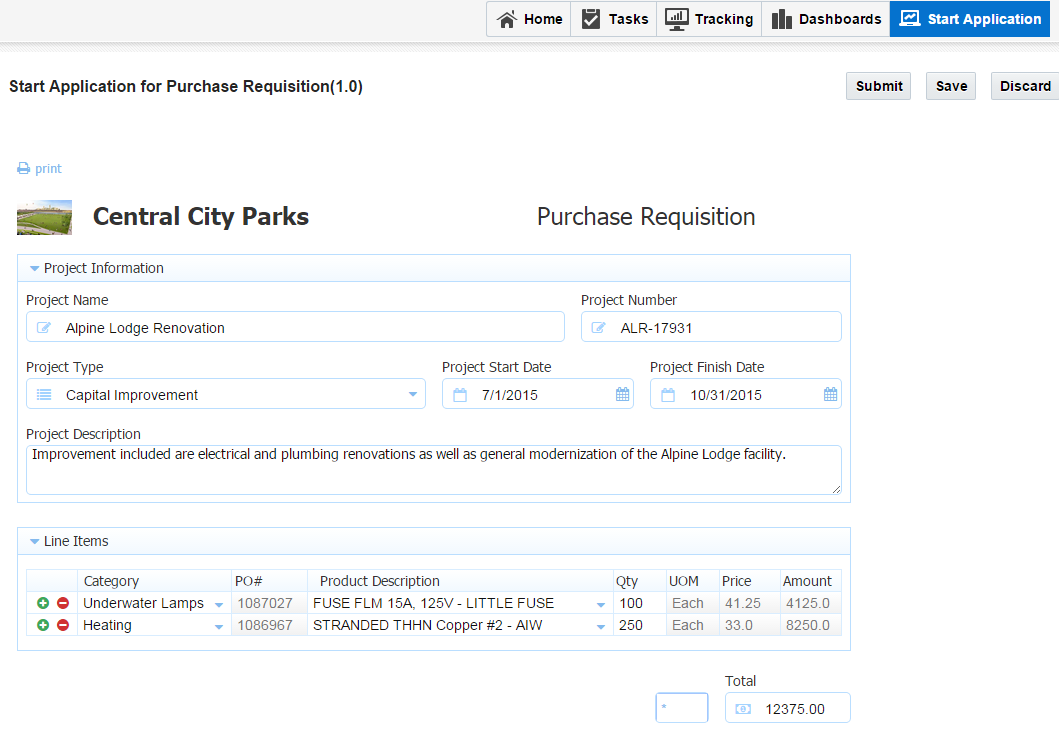
For the purpose of this lab and to facilitate multiple attendees, you will be using a set of users that have the different roles (General Foreman, Deputy Manager, Finance, and Purchasing) for the Purchase Requisition process. You will login using the user name with your Attendee # appended for each of users.

The PCS Workspace can be opened using the following URL:

http://<Your assigned Machine and Port>/bpm/workspace

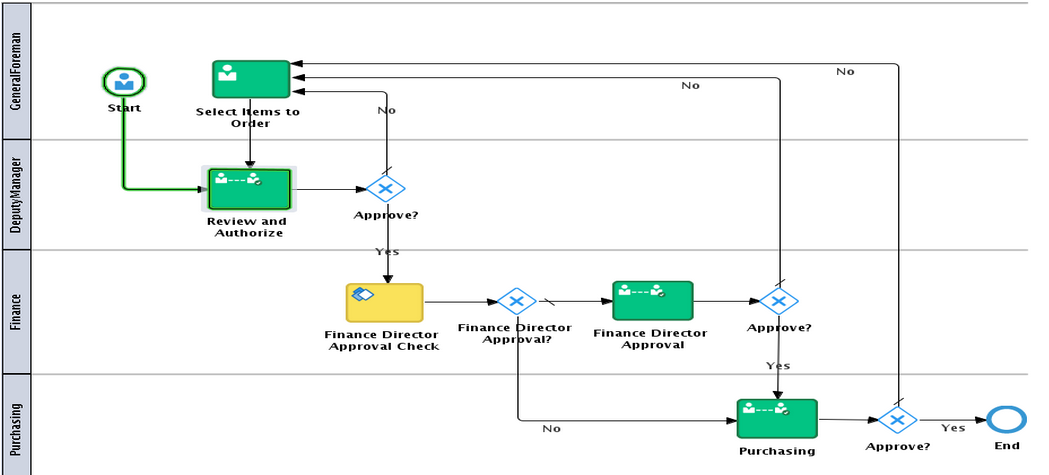
# Starting the Application – General Foreman

1. Login to the PCS Workspace using the follow URL and credentials:
   1. Username: jstein<#> where <#> is your Attendee #
   2. Password: welcome1
2. Click the Start Application button.
3. Click the PurchaseRequisition image or link.
4. Enter Project Information (any information is fine).
5. Enter Line Items that total greater than $10,000.
6. Click the Submit button.



# Tracking your instance

1. Select the Tracking button in the Top Menu Bar
2. Select your task and View the History
   1. Graphical View
   2. Tree View
      1. Observe the detail audit trail and XML payload.
   3. List View
      1. Select Filters to filter on specific details.



# Creating an Exception Instance

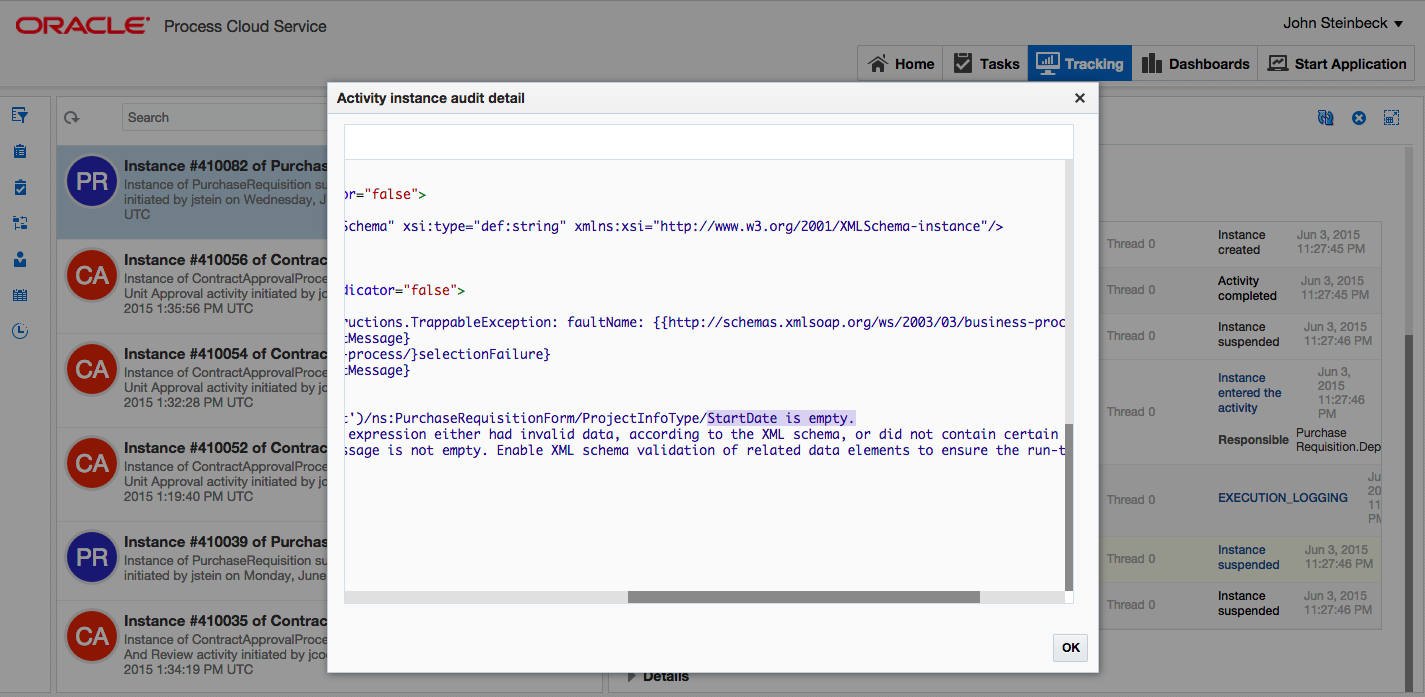
1. Click the Start Application button.
2. Click the PurchaseRequisition image or link.
3. Enter Project Information (any information is fine) but make sure to **NOT** enter a Project Start Date.
4. Enter a Line Item
5. Click the Submit button.
6. Sign Out.

# Approval – Deputy Manager

1. Login to the PCS Workspace using the follow URL and credentials:
   1. Username: vhugo<#> where <#> is your Attendee #
   2. Password: welcome1
2. Select the Tasks button on the Top Menu bar
3. Select the Task that was just started and observe the data.
4. Reassign Task to Robert Stevenson
   1. Add a Comment to the Task
      1. Scroll down and enter the Comment in the text box and make sure to select the Post Comment button.
   2. Reassign to user rsteven<#> using the More / Reassign task action.
5. The task should be removed from the list.

# Manage Suspended Task– Deputy Manager

1. Click on the Home button from the Action Bar.
2. Select the Suspended Instances button on the top right.
3. Select the Suspended Task from the List.
4. From the History
   1. Select the **TreeView** from the dropdown list.
   2. Expand the Review and Authorize Human Task and click the EXECUTION\_LOGGING link.
   3. Observe the “StartDate is empty” error.



1. Altering the flow
   1. Click Alter Flow and Resume
   2. Select the Select Items to Order from the New Activity dropdown.
   3. Click **Resume**.
2. Observe how the **History** changes both in the Graphical and Tree View.

