

Microsoft Dynamics® AX

Task recorder update

White Paper

This white paper describes how to use the advanced functions in Task recorder that are available in Knowledge Base article 2863182. You can generate artifacts that can be uploaded to Business process modeler in Lifecycle Services for Microsoft Dynamics AX. You can create cross-functional flowcharts and activities that you can modify to identify business process requirements and generate implementation artifacts.

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Overview

The Task recorder that is included with Microsoft Dynamics AX lets you quickly create documentation of a business process. Task recorder can create Microsoft Word documents and a video that you can use to document how to perform a task. You can also specify a template to use when you create a document, so that all the documents that you create have the same look and feel.

The updated Task recorder that is available in a hotfix has an advanced mode. This mode captures additional metadata that lets you create a file that can be uploaded to Business process modeler in Lifecycle Services for Microsoft Dynamics AX. This file includes cross-functional flowcharts and activities that you can modify to identify business requirements and generate implementation artifacts.

Task recorder update is available for Microsoft Dynamics AX 2012 R2, Microsoft Dynamics AX 2012 Feature Pack, and Microsoft Dynamics AX 2012.

Downloading and installing Task recorder

The updated Task recorder is available as a hotfix. The hotfix consists of a client update and a model file. You must install the client update on all Microsoft Dynamics AX 2012 clients.

Knowledge Base article 2863182 contains installation files for the following versions:

- Microsoft Dynamics AX 2012 and Microsoft Dynamics AX 2012 Feature Pack: <http://go.microsoft.com/fwlink/?LinkId=309910>
- Microsoft Dynamics AX 2012 R2: <http://go.microsoft.com/fwlink/?LinkId=309911>

Basic and advanced mode

The updated Task recorder has two modes:

- **Basic mode** – This mode generates a Word document and a video recording of the selected business processes in a predefined shared folder.
- **Advanced mode** – Use this mode to record, upload, and share your business processes to Business process modeler in Lifecycle Services for Microsoft Dynamics AX. Advanced mode can generate a package file that can be uploaded to Business process modeler. The package file contains hierarchy, process, and Application Object Tree (AOT) metadata, and also task documents and videos.

Prerequisites and supported environments

If you want to use the updated Task recorder, the following products are required:

- Windows Media Player. For more information about Windows Media Player, see <http://windows.microsoft.com/en-us/windows/windows-media-player>.
- Word installed on the computer where you want to use Task recorder. If you do not have Word installed, Task recorder generates an XML file. For more information about Word and Microsoft Office, please see <http://office.microsoft.com>.

- A Microsoft Dynamics AX client and an Application Object Server (AOS) server:
 - In basic mode: The Microsoft Dynamics AX client and AOS server can be installed on different computers.
 - In advanced mode: The Microsoft Dynamics AX client and AOS server must be installed on the same computer.

In addition, all users who use Task recorder must have write access to a central file share where the recording output is saved.

If you want to use advanced mode, there are additional requirements:

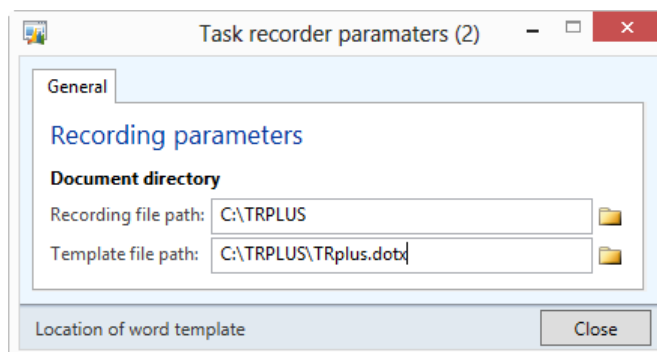
- You must have Microsoft Office installed.
- The AOS service account must have write access to the document folder share.

Basic mode in Task recorder

Configure Task recorder for basic mode

To configure Task recorder for basic mode, follow these steps:

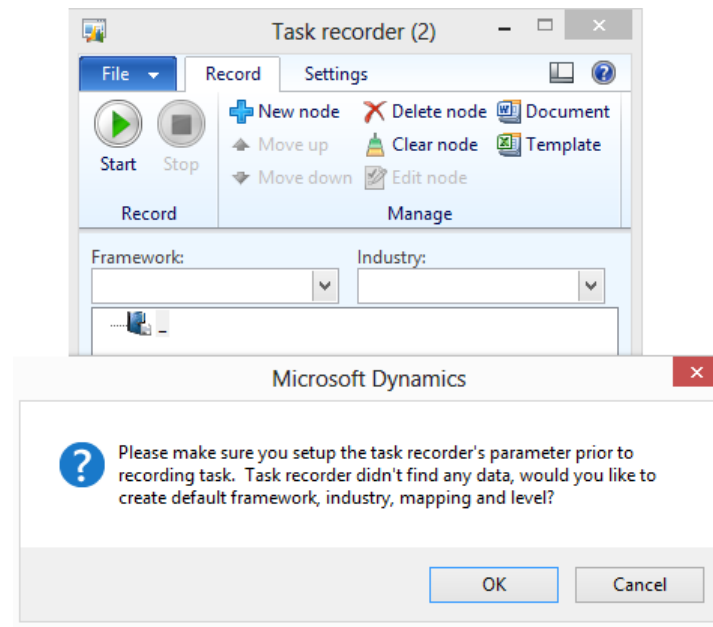
1. On the **File** menu, click **Tools** > **Task recorder** to open the **Task recorder** form.
2. On the **Settings** tab, click **Parameters**. In the **Task recorder parameters** form, in the **Recording file path** field, select the location in which to generate the recording files.
3. To use a template when you create a document, in the **Template file path** field, select a template location.



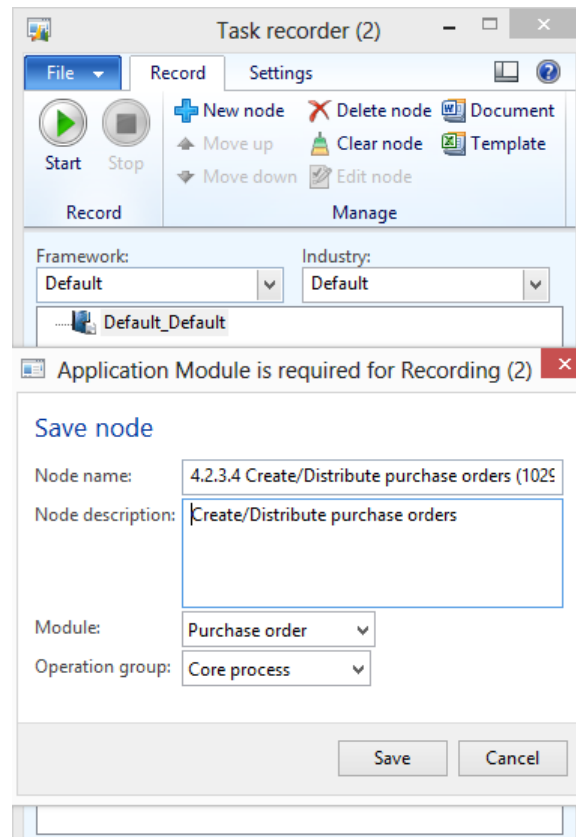
Record a task in basic mode

To record a task in basic mode, follow these steps:

1. On the **File** menu, click **Tools** > **Task recorder** to open the **Task recorder** form.
2. If no framework and industry are selected, follow these steps:
 1. On the **Action Pane**, click the **Start** button. When you are prompted to create a default framework and industry, click **OK**.



2. Select the root node, click **New node**, enter the name and description of the task to record, and then click **Save**. The task is created under the root node.



–or–

If you have selected a framework and industry, expand and select the node to record.

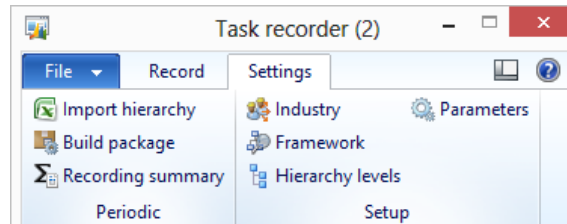
3. Click **Start**. The **Task recorder** form is minimized.
4. Complete the task in Microsoft Dynamics AX 2012. The maximum recording length is 10 minutes.
5. When the recording is completed, expand the minimized **Task recorder** form, and then click **Stop**. The video and the Word document are saved in the folder that you selected in the **Recording file path** field in the **Task recorder parameters** form.
6. Optional: You can re-record a node; or you can select a node and then click **Clear node**, which removes the associated files.
7. Optional: To view the video, navigate to the shared folder that you selected in the **Recording file path** field in the **Task recorder parameters** form. Open the subfolder that is named in the format <Framework>_<Industry>. For example, if your process name is Create/Distribute purchase orders, the folder name that is created after recording is Create_4212B2BB.

Advanced mode in Task recorder

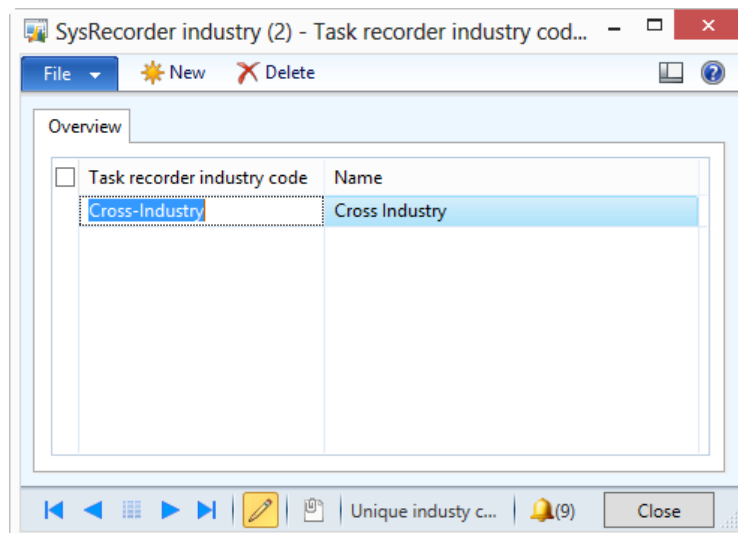
Configure Task recorder for advanced mode

To configure Task recorder for advanced mode, follow these steps:

1. On the **File** menu, click **Tools** > **Task recorder** to open the **Task recorder** form.
2. On the **Action Pane**, on the **Settings** tab, click **Industry** to configure a new industry.



3. Enter information about the industry, and then close the **SysRecorder industry** form.



4. In the **Task recorder** form, on the **Settings** tab, click **Framework** to configure a new framework. Enter information about the framework, and then close the **SysRecorder framework** form.

Framework id	Name	Publisher
SureStep	SureStep	Microsoft Corporation

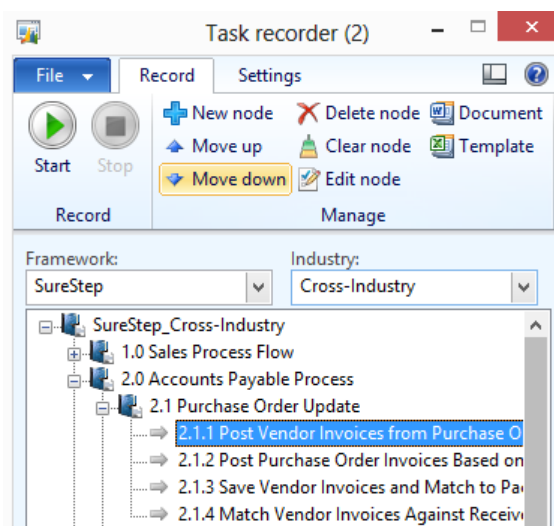
5. In the **Task recorder** form, on the **Settings** tab, click **Hierarchy levels** to configure the levels for the framework and industry. To capture information for Business process modeler, select **Advanced** for the combination of a framework and an industry. Close the **Hierarchy levels** form.

Allow artifacts	Hierarchy level	Sequence
<input type="checkbox"/>	Process	1
<input checked="" type="checkbox"/>	Activity	2
<input checked="" type="checkbox"/>	Task	3

Record a task in advanced mode

To record a task in advanced mode, follow these steps:

1. Open Microsoft Dynamics AX as an administrator. (Right-click the **Microsoft Dynamics 2012 AX** icon, and then select **Run as Administrator**.)
2. On the **File** menu, click **Tools** > **Task recorder** to open the **Task recorder** form.
3. Select the framework and industry, and then expand and select the node to record.
4. For the selected node, in the **Module** field, select a module.



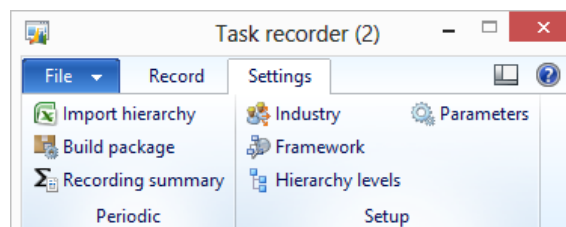
5. Click **Start**. The **Task recorder** form is minimized.
6. Complete the task in Microsoft Dynamics AX 2012. The maximum recording length is 10 minutes.
7. When the recording is completed, expand the minimized **Task recorder** form, and then click **Stop**. The video and the Word document are saved in the folder that you selected in **Recording file path** field in the **Task recorder parameters** form.
8. Optional: You can re-record a node; or you can select a node and then click **Clear node**, which removes the associated files.
9. Optional: After you have finished recording, the selected node displays a blue arrow. You can select that node and then click **Document** to generate a step-by-step Word document.
10. Optional: To view the video, navigate to the shared folder that you selected in the **Recording file path** field in the **Task recorder parameters** form. Open the subfolder that is named in the format <Framework>_<Industry>. For example, if your process name is Create/Distribute purchase orders, the folder name that is created after recording is Create_4212B2BB.

Generate a package for Business process modeler in Lifecycle Services for Microsoft Dynamics AX

The advanced mode of Task recorder generates artifacts that can be uploaded to Business process modeler in Lifecycle Services for Microsoft Dynamics AX. You can define, record, and upload your business processes, and share them with teams, with organizations, and globally. To generate a package for Business process modeler, follow these steps:

1. Define your organization's business process hierarchy in Task recorder advanced mode.
2. Generate the recordings for the selected nodes.
3. After the processes have been recorded for a framework, in the **Task recorder** form, click **Build package**.

Note: Only one person should click this button for a framework.



Clicking **Build package** starts a batch job that processes the files. The batch job might take a long time.

After the batch job is completed, an .axbpm file is generated in the folder that you specified in the **Task recorder parameters** form. The format of the file name is <Framework>_<Industry><ddmmyyyhhmm>.axbpm.

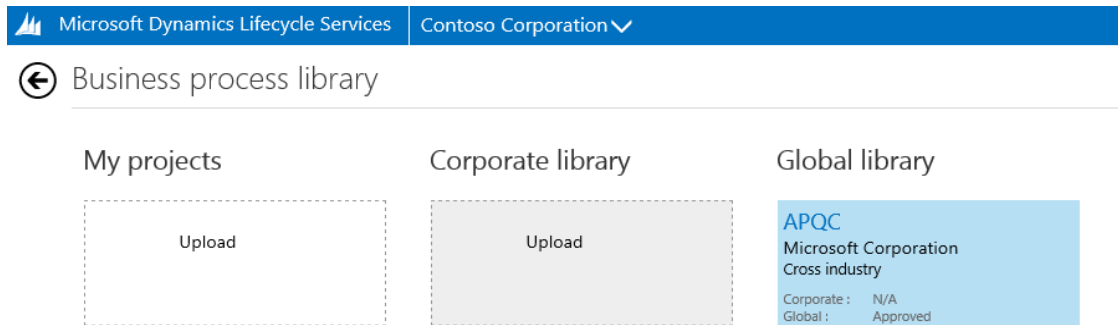
This file is what is uploaded to Business process modeler.

Upload the business process maps to Business process modeler

The Business process modeler (*.axbpm) files that are generated by Task recorder can be uploaded to Business process modeler in Lifecycle Services for Microsoft Dynamics AX. Users can then explore and modify the recorded business processes.

To upload the business process files, follow these steps:

1. Sign in to Microsoft Dynamics Lifecycle Services. On the **Organization** workspace, select a project. On the **Project** home page, click the **Business process modeler** tile.
2. On the **Business process library** page, in the **My projects** or **Corporate library** section, click **Upload**.



- If you upload your business process package to **My projects**, the business processes can be viewed only by you or by the users that you give access to.
- If you upload your business process package to the **Corporate library** section, the business processes can be viewed by all users from your organization.
- If you upload a business process package to **My projects**, you can right-click and then select **Promote** on the app bar. This makes the business processes available in the **Corporate library** section. Only the administrator can approve these promotion requests. You can also promote business processes from the **Corporate library** section to the **Global library** section. Only Microsoft can approve these promotion requests.

- On the **Administration** page, in the **New** section, select the industry, and then enter a name and description. Click the **Upload** button, select the .axbpm file, and then click **OK**. The file is uploaded.

The screenshot shows the 'Administration' page in Microsoft Dynamics Lifecycle Services. The 'New' section is active, displaying a form to create a new solution. The 'Create solution for' dropdown is set to 'Contoso Corporation'. The 'Industry' dropdown is set to 'Cross industry'. The 'Name' field is empty, and the 'Description' field is also empty. The 'Upload' button is visible at the bottom of the form.

Upload status

Created at	Created by	Solution name	File name	Status	Status detail
6/14/2013 7:09 AM	Basu, Anjit	AX 2012 Hotfix Test	Sure Step_Cross Industry_201306140704.axbpm	Success	2 lines, 1 leaf lines, 1 flowcharts.

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You can view the status of the business process upload on the **Administration** page.

The screenshot shows the 'Administration' page in Microsoft Dynamics Lifecycle Services. The 'Upload status' table is displayed, showing the status of the business process upload.

Upload status

Created at	Created by	Solution name	File name	Status	Status detail
6/14/2013 7:09 AM	Basu, Anjit	AX 2012 Hotfix Test	Sure Step_Cross Industry_201306140704.axbpm	Success	2 lines, 1 leaf lines, 1 flowcharts.

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After the business process package has been uploaded, you can view the business process framework from the **Business process library** page.

Uploading and creating business process data

Users can create data for the processes inside Task recorder in two ways:

- Manually
- By using the Microsoft Excel upload function

In both cases, users must have configured the framework, industry, and framework levels in the **Task recorder parameters** form.

Create business process data manually

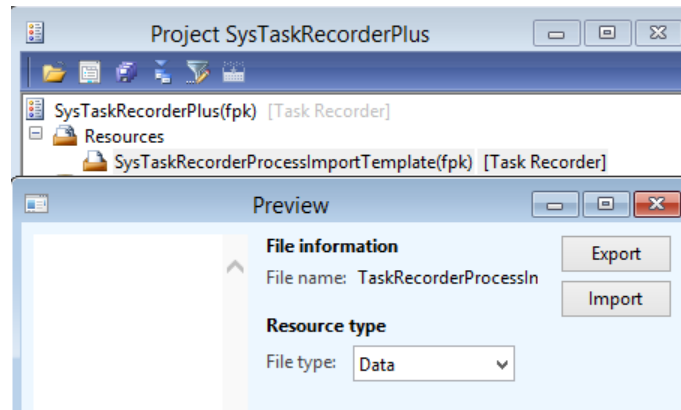
1. On the **File** menu, click **Tools** > **Task recorder** to open the **Task recorder** form.
2. Select a framework and industry, and then select a node.
3. Click **New node**. Enter information about the node, and then click **Save**.

The screenshot shows the 'Task recorder (2)' application window. The 'Record' tab is active, displaying a toolbar with buttons for 'Start', 'Stop', 'New node', 'Delete node', 'Move up', 'Move down', 'Clear node', and 'Edit node'. Below the toolbar, there are dropdown menus for 'Framework' (set to 'Default') and 'Industry' (set to 'Default'), and a text field for 'Default_Default'. A red error message at the bottom of the window states: 'Application Module is required for Recording (2)'. Overlaid on this window is a 'Save node' dialog box. The dialog contains the following fields: 'Node name' with the value '4.2.3.4 Create/Distribute purchase orders (1025', 'Node description' with the value 'Create/Distribute purchase orders', 'Module' with a dropdown menu set to 'Purchase order', and 'Operation group' with a dropdown menu set to 'Core process'. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

4. Optional: You can select nodes and then click **New node** to create child nodes.
5. Optional: You can use the **Move up**, **Move down**, and **Delete node** buttons to modify nodes.

Upload business process data by using Excel

1. Save the Excel template that is included in the Task recorder hotfix. To find the Excel file, open the Microsoft Dynamics AX project \Projects\Shared\SysTaskRecorderPlus, and export this file from the Microsoft Dynamics AX resource file as shown in the following screenshot. This has to be done by a Microsoft Dynamics AX administrator or developer.



2. Open the template in Excel, and enter the following data:

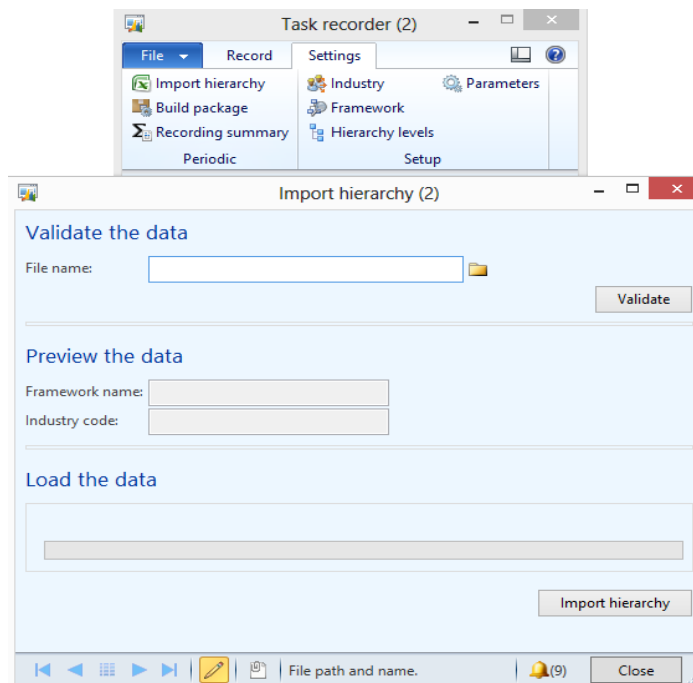
- ID
- Process name
- Process description
- Parent ID
- Framework name
- Framework level
- Group
- Module
- Usage profile

The values that you enter for the framework name, framework level, and group must also exist in the forms that are opened from the **Task recorder parameters** form.

Microsoft Dynamics AX - Arijit Basu (DYNAMICS)										
FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW Load Test Dynamics AX POWERPIVOT TEAM										
E6										
	A	B	C	D	E	F	G	H	I	J
1	ID	Framework Name	Industry	Framework Level	Process Name	Process Description	Parent ID	Group	Module	Usage Prof
2	1	APQC PCF	Cross-Industry	Process	4.0 Deliver Products and Services	4.0 Deliver Products and Services		Core Process	Invent	Setup
3	2	APQC PCF	Cross-Industry	Activity	4.1 Plan for and align supply chain resources (10215)	4.1 Plan for and align supply chain resources (10215)		1 Core Process	Invent	Transaction
4										

3. After you enter information into the template, log on to Microsoft Dynamics AX.
4. On the **File** menu, click **Tools** > **Task recorder** to open the **Task recorder** form.

5. Click **Import data**, and then enter the file name. Click **Validate** and then **Import hierarchy**. The data is imported into Task recorder.



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