Task Detail

The Task Detail page presents the user with more detailed information about a task, including instructions for completing the task, its associated process data, and a list of its dispositions, or actions.

The Task Detail page shows any process content data associated with this task as defined in the Designer application. Some data may be already filled in from other parts of the process and some may be read/view only and not updateable.

The top section of the form gives details on the Task itself. This includes the name of the Task, who the Task is currently assigned to, who initiated the Process Instance, the date the Task was assigned (Task Date), the Task's Due Date, and optionally an Escalation Date. The Escalation Date represents the date/time this Task will expire and the Overdue action will be run. The Overdue action will be shown in the Escalation field, if applicable.

Fields with a gray background are read-only and cannot be changed or updated. Fields with their labels highlighted in red require information before the task can be completed.

Process data may contain text fields, numeric and date fields, note and log fields, and document attachments.

Text, Date, and Numeric Fields

Text, date, and numeric fields allow for viewing and input of short or single lines of information. The process designer can require information to be supplied in some fields before a task can be completed.

Memo Fields

Memo fields allow for multiple lines of text and are used when a large amount of information may be required.

Log Fields

Log fields keep a running log of information which includes information on who and when the items were updated. The top half of a log field lists all current log entries along with the person's username and timestamp of when the information was updated. The lower half of the log field allows the current user to add a log entry. When the task is updated, the information entered will be preceded by the user's name and timestamp, and added to the top half of the log field.

Attachments

Tasks can contain document or binary attachments. Attachments may be document scans, MS-Office documents, PDF files, or any other applicable type of file. If there already is a document attached to the task, the user can view the document, download it to their disk, or have the server email it as an email attachment. To add or replace a document, the user would click on the browse button and locate the document on their computer. The document will be uploaded to the server when the task is updated or completed.

Line Item Tables

Line Item Tables allow you to enter multiple rows of data where the columns remain common between the entries.

Task Completion

After the user has reviewed and changed any process content data related to the task, they can determine the disposition of the task by clicking on an action button. The action buttons are defined by the process designer and allow the process to take on different routes based on the button selected.

Save Updates

If the user just wishes to update the data and work on the task more at a later time, they would click on the "Save Updates" button. This saves and updates the data, but keeps the current owner of the task. The task is not considered complete until one of the action buttons is pressed.

Undo Ownership Request

If a user decides not to work on the current task, they can "undo" the owners hip request and reassign the task back to its original group or person.

Task Reassignment

Some tasks may be reassigned to an arbitrary group or person as well. The user would choose the group or user from the drop down list and click the "Reassign" button.