

User Tasks

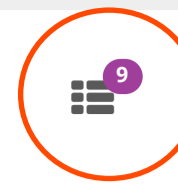
Wireframes

Version History

Date	Version	Comments
2015-05-11	0.2.5	For Setting a Task, Fields are pre-selected to allow easy task setup for logged-in user and to allow them to perform task immediately. Removed toolbar buttons from Task details view under Renée's instruction. This now means user cannot delegate task after viewing it's details and can only delegate/re-assign from the main tasks list view instead.
2015-05-11	0.2.4	Remove "Creation Date" column, replace with "Job Name"; "Assignee" can only display user's name or none; Remove New User Tasks - the process of creating and managing them will fall within the Workflows section where a workflow is sub-classed as a user task and edited within the Workflow Modeller; refine the "Initiate/set Task" process to incorporate the ability to set task for one individual or one person within a list of candidates can claim the task or the same task will be assigned to multiple users; Remove Task ID.
2015-05-07	0.2.3	Additional pages to illustrate different toolbar button combination states; illustrate alternative tasks screen with access to list of all available tasks and details screens; annotation updates.
2015-04-27	0.2.2	Added Due Date column to List View; Renamed "Current Owner" to "Assignee"; Added radio buttons to select between assigning task to one owner/user only or assign same task to everyone on the recipient list; Delegating a task can only be assigned to one user. - Requirements from meeting with Renée, Guillaume, Weidong, Yooch (05-May-2015).
2015-04-27	0.2.1	De-scoped (removed) tabbed views for initial release, removed status column from User Tasks list view. Removed design option for using "Miller columns" to select Tasks within "Initiate Task" screen.
2015-04-27	0.2	Initial Public Version

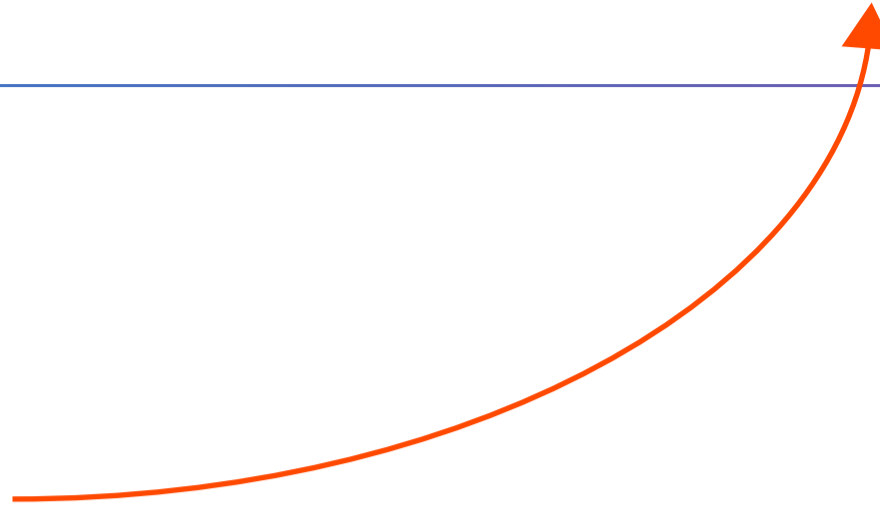


Title



Arthur Walter ▾

Click on icon
to access User Tasks
screen

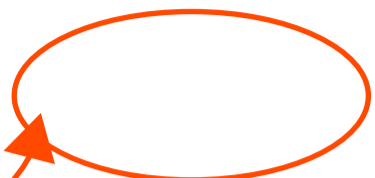




Initiate New Task

Your Tasks

+ New



9 User Tasks

Search by keyword



Toolbar buttons hidden until a task has been selected from the list

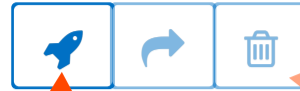
Task Name	Job ID	Due Date	Priority	Created By	Assignee
Task Name AAA BBB CC	ID-MC3VM1-65023...	28-Apr-2015 12:00	High	System	-
Task Name BBB CCC DDD			Medium	Mandy Smith	Arthur Walter
A Very Very Long Task Na...	ID-MC3VM1-92748...	28-Apr-2015 14:30	Medium	System	Arthur Walter
Task Name XYZ	ID-MC3VM1-87390...		Medium	Stuart John...	Arthur Walter
Task Name ABC	-		Low	System	-
TaskName_ABC_001_12...	ID-MC3VM1-45425...		Low	Arthur walter	-

User will only be able to see tasks assigned to them or ones they can "claim".



Your Tasks

+ New



9 User Tasks

Search by keyword



Task Name	Job ID	Due Date	Priority	Created By	Assignee
Task Name AAA BBB CC	ID-MC3VM1-65023...	28-Apr-2015 12:00	High	System	-
Task Name BBB CCC DDD			Medium	Mandy Smith	Arthur Walter
A Very Very Long Task Na...	ID-MC3VM1-92748...	28-Apr-2015 14:30	Medium	System	Arthur Walter
Task Name XYZ	ID-MC3VM1-87390...		Medium	Stuart John...	Arthur Walter
Task Name ABC	-		Low	System	-
TaskName_ABC_001_12...	ID-MC3VM1-45425...		Low	Arthur walter	-

If a selected task from the list has **no assignee** then the "Assign task to yourself" button is enabled.

Forward / Delegate - Enabled only if user is the **current assignee** of the task

Delete - Enabled only if user is the **creator** of the task (It is the Process-Instance which is deleted!)



Forward / Delegate - enabled only if user is the current assignee

Your Tasks

+ New

21 User Tasks

Search by keyword

Task Name	Job ID	Due Date	Priority	Created By	Assignee
Task Name AAA BBB CC	ID-MC3VM1-65023...	28-Apr-2015 12:00	High	System	-
Task Name BBB CCC DDD			Medium	Mandy Smith	Arthur Walter
A Very Very Long Task Na...	ID-MC3VM1-92748...	28-Apr-2015 14:30	Medium	System	Arthur Walter
Task Name XYZ	ID-MC3VM1-87390...		Medium	Stuart John...	Arthur Walter
Task Name ABC	-		Low	System	-
TaskName_ABC_001_12...	ID-MC3VM1-45425...		Low	Arthur walter	-

If a selected task from the list has **no assignee** then the "Assign task to yourself" button is enabled.

Delete - enabled only if user is the **creator** of the task (It is the Process-Instance which is deleted!)



Your Tasks

+ New

Forward / Delegate (rocket icon) Assign to yourself (refresh icon) Delete (trash icon)

21 User Tasks

Search by keyword

Sort (dropdown) Filter (dropdown)

Task Name	Job ID	Due Date	Priority	Created By	Assignee
Task Name AAA BBB CC	ID-MC3VM1-65023...	28-Apr-2015 12:00	High	System	-
Task Name BBB CCC DDD			Medium	Mandy Smith	Arthur Walter
A Very Very Long Task Na...	ID-MC3VM1-92748...	28-Apr-2015 14:30	Medium	System	Arthur Walter
Task Name XYZ	ID-MC3VM1-87390...		Medium	Stuart John...	Arthur Walter
Task Name ABC	-		Low	System	-
TaskName_ABC_001_12...	ID-MC3VM1-45425...		Low	Arthur walter	-

Forward / Delegate - enabled only if user is the current assignee

If a selected task from the list has **no assignee** then the "Assign task to yourself" button is enabled.

Delete - enabled only if user is the **creator** of the task (It is the Process-Instance which is deleted!)

Task Details



Your Tasks

+ New

21 User Tasks

Search by keyword



Task Name	Job ID	Due Date	Priority	Created By	Assignee
Task Name AAA BBB CC	ID-MC3VM1-65023...	28-Apr-2015 12:00	High	System	-
Task Name BBB CCC DDD			Medium	Mandy Smith	Arthur Walter
A Very Very Long Task Na...	ID-MC3VM1-92748...	28-Apr-2015 14:30	Medium	System	Arthur Walter
Task Name XYZ	ID-MC3VM1-87390...		Medium	Stuart John...	Arthur Walter
Task Name ABC	-		Low	System	-
TaskName_ABC_001_12...	ID-MC3VM1-45425...		Low	Arthur walter	-



User clicks on Task Name to view task details on a dedicated Details page

Details Page for a workflow created Task



Task Name Goes Here

Details
Task Form

"Task Form" tab is only visible if the user is the assignee

Hide Details

Description

Task description goes here. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nullam nunc dolor, dictum quis suscipit eget.

Date Created

23-Apr-2015 13:32 BST

Date Due

23-Apr-2015 13:32 BST

Created by

System

Current Task Owner

Arthur Walter

Urgency / Priority

High

Job ID

WEX-221BFD2A-AX899123-79A

Workflow

A Very Very Very Long Workflow Name

Task ID

1055906935

Comments

Comments are displayed with most recent first

#	Date	From	Comment
004	23-Apr-2015 12:34	Peter Snell	Engineer called to fix as Tony is unable to fix
003	23-Apr-2015 12:07	Michelle Ford	New printer request sent for approval
002	23-Apr-2015 12:03	Gurpreet Singh	Tony's looking into it
001	23-Apr-2015 11:46	Arthur Walter	Can someone fix this issue ASAP and order a new printer as these jams are occurring too often!



Task Name Goes Here

Details

Task Form

Text input

Text area

Dropdown

Stepper

Submit

Cancel

For simplicity, form elements are displayed one after the other, and not displayed inline.

Dynamically generated form (scrollable)



You have completed task "ABC-DEFGH-321-234-789".

Floating confirmation alert

User Tasks

+ New

21 User Tasks

Search by keyword



Task Name	Job ID	Due Date	Priority	Created By	Assignee
Task Name AAA BBB CC	ID-MC3VM1-65023...	28-Apr-2015 12:00	High	System	-
Task Name BBB CCC DDD			Medium	Mandy Smith	Arthur Walter
A Very Very Long Task Na...	ID-MC3VM1-92748...	28-Apr-2015 14:30	Medium	System	Arthur Walter
Task Name XYZ	ID-MC3VM1-87390...		Medium	Stuart John...	Arthur Walter
Task Name ABC	-		Low	System	-
TaskName_ABC_001_12...	ID-MC3VM1-45425...		Low	Arthur walter	-

Initiate New Task



Set New Task

Your Tasks

+ New

21 User Tasks

Search by keyword

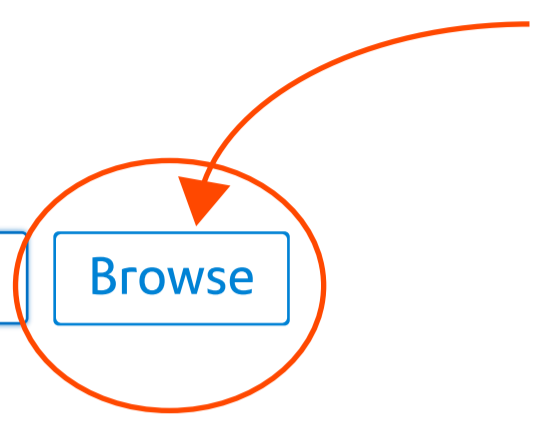


Task Name	Job ID	Due Date	Priority	Created By	Assignee
Task Name AAA BBB CC	ID-MC3VM1-65023...	28-Apr-2015 12:00	High	System	-
Task Name BBB CCC DDD			Medium	Mandy Smith	Arthur Walter
A Very Very Long Task Na...	ID-MC3VM1-92748...	28-Apr-2015 14:30	Medium	System	Arthur Walter
Task Name XYZ	ID-MC3VM1-87390...		Medium	Stuart John...	Arthur Walter
Task Name ABC	-		Low	System	-
TaskName_ABC_001_12...	ID-MC3VM1-45425...		Low	Arthur walter	-



Set Task

Select Task



Employs the same design pattern as selecting "source" and "workflow" within "New Entry Points", where it spawns a modal allowing user to select from items displayed in grid or list view, although for Tasks, list view is the only option available to the user.

Description

Priority

Due Date

Due Time

Comments (Optional)

Assign task to

- One person
- One person within a group of candidates
- Multiple people



Set Task

Select Task

Task Name	Description
Task Name AAA BBB CC	Lorem ipsum dolor itsuit. -
Task Name BBB CCC DDD	Praesent tempor magna sed sem volutpat, vitae dictum nulla lacinia.
A Very Very Long Task Na...	Maecenas ut egestas mi, non mollis dui. Proin lacinia quis risus a consectetur. Ut neque quam ...
TaskName_ABC_001_12...	Pellentesque sem lectus, gravida vel ex non, iaculis sagittis leo. Morbi scelerisque ex eget pell...
TaskName_DEF_024_13...	Quisque varius, eros eu ornare pharetra, est augue tincidunt leo, nec tempor nulla justo ut lectus ...

Select Cancel

Priority: Please select ...

Due Date: DD-MMM-YYYY

Due Time: HH:MM

Comments (Optional)

Set Task Cancel



If task is to be assigned to one person (yourself)

Set Task

Select Task

Browse

Description

Priority

Due Date

Due Time

Comments (Optional)

Assign task to

Assignee

Perform task now

Set Task

Cancel

Form by default has various pre-selected form values to minimise user input to set task for themselves.

However, user can change these values.

Pre-populated with user's own name

Pre-selected



Add yourself

Pre-selected



If task is to be assigned to one person (not yourself)

Set Task

Select Task

Browse

Description

Priority

Due Date

Due Time

Comments (Optional)

Assign task to

If "one person" is selected then this section appears

Assignee

one value allowed

Un-checking this will remove own user's name from the assignee field

 Add yourself

Set Task

Cancel



If task is to be assigned to one person from a group of candidates

Set Task

Select Task

Browse

Description

Priority

Due Date

Due Time

Comments (Optional)

Assign task to

If "one person within a group of candidates" is selected then this section appears

Assignee Candidates

Add yourself

Gurpreet Singh × Operators (Night-Shift) × Operators (Day-Shift) × Michelle Ford ×

Set Task

Cancel



If task is to be assigned to one person from a group of candidates

Set Task

Select Task

Description

Priority

Due Date

Due Time

Comments (Optional)

Assign task to

Candidate Assignees

Add yourself

Gurpreet Singh × Operators (Night-Shift) × Operators (Day-Shift) × Michelle Ford × Arthur Walter ×

Cancel

.Checking "Add yourself" will add user's own name to the list



If the same task is to be assigned to multiple people

Set Task

PRIORITY

Medium ▾

Due Date

DD-MMM-YYYY

Due Time

HH:MM

Comments (Optional)

Assign task to

Multiple people ▾

If "multiple people" is selected then this section appears

Assignees

Gurpreet Singh × Operators (Night-Shift) × Operators (Day-Shift) × Michelle Ford × Arthur Walter ×

Add yourself

Completion Criteria

Select from list... ▾

- All assignees
- A percentage of assignees
- A minimum number of assignees

have to complete the task

Checking "Add yourself" will add user's own name to the list and display a new field below allowing the user to state if they would want to perform the task immediately.

Perform task now

Set Task Cancel



If the same task is to be assigned to multiple people

Set Task

PRIORITY

Medium ▾

DUE DATE

DD-MMM-YYYY

DUE TIME

HH:MM

Comments (Optional)

Assign task to

Multiple people ▾

If "multiple people" is selected then this section appears

Assignees Add yourself

Gurpreet Singh × Operators (Night-Shift) × Operators (Day-Shift) × Michelle Ford × Arthur Walter ×

Completion Criteria

A percentage of assignees ▾

All assignees

A percentage of assignees

A minimum number of assignees

have to complete the task

Enter Minimum Percentage

75 %

If "A Percentage of assignees" is selected then display this section

Perform task now

Set Task Cancel



If the same task is to be assigned to multiple people

Set Task

PRIORITY

Medium ▾

Due Date

DD-MMM-YYYY

Due Time

HH:MM

Comments (Optional)

Assign task to

Multiple people ▾

If "multiple people" is selected then this section appears

Assignees Add yourself

Gurpreet Singh × Operators (Night-Shift) × Operators (Day-Shift) × Michelle Ford × Arthur Walter ×

Completion Criteria

A minimum number of assignees ▾

All assignees

A percentage of assignees

A minimum number of assignees

have to complete the task

Minimum Number of Assignees

6

If "A minimum number of assignees" is selected then display this section

Perform task now

Set Task Cancel



You have set and initiated task "TaskName_ABC_001-123_EFG_789".

Floating confirmation alert

User Tasks

+ New

21 User Tasks



Search by keyword



Task Name	Job ID	Due Date	Priority	Created By	Assignee
Task Name AAA BBB CC	ID-MC3VM1-65023...	28-Apr-2015 12:00	High	System	-
Task Name BBB CCC DDD			Medium	Mandy Smith	Arthur Walter
A Very Very Long Task Na...	ID-MC3VM1-92748...	28-Apr-2015 14:30	Medium	System	Arthur Walter
Task Name XYZ	ID-MC3VM1-87390...		Medium	Stuart John...	Arthur Walter
Task Name ABC	-		Low	System	-
TaskName_ABC_001_12...	ID-MC3VM1-45425...		Low	Arthur walter	-

Performing a task immediately after initiating



Set Task

PRIORITY
Medium

DUE DATE
DD-MMM-YYYY

DUE TIME
HH:MM

Comments (Optional)

Assign task to
Multiple people

Assignees

Add yourself

Gurpreet Singh × Operators (Night-Shift) × Operators (Day-Shift) × Michelle Ford × Arthur Walter ×

Completion Criteria
A minimum number of assignees have to complete the task

Minimum Number of Assignees
6

Perform task now

Set Task Cancel

1) If user is one of the assignees or the only assignee to the task
2) and they have checked "Perform task now"
then ...



Task Name Goes Here

Details

Task Form

Text input

Text area

Dropdown

Stepper

Submit

Cancel

3) ... the user will be presented with the "Task Detail" page with the "Task Form" view (tab) active/in focus.

Dynamically generated form (scrollable)

For simplicity, form elements are displayed one after the other, and not displayed inline.

Delegating Individual Tasks



Forward / Delegate - enabled only if user is the current assignee

Your Tasks

+ New

21 User Tasks

Search by keyword

Task Name	Job ID	Due Date	Priority	Created By	Assignee
Task Name AAA BBB CC	ID-MC3VM1-65023...	28-Apr-2015 12:00	High	System	-
Task Name BBB CCC DDD			Medium	Mandy Smith	Arthur Walter
A Very Very Long Task Na...	ID-MC3VM1-92748...	28-Apr-2015 14:30	Medium	System	Arthur Walter
Task Name XYZ	ID-MC3VM1-87390...		Medium	Stuart John...	Arthur Walter
Task Name ABC	-		Low	System	-
TaskName_ABC_001_12...	ID-MC3VM1-45425...		Low	Arthur walter	-



Forward / Delegate - enabled only if user is the current assignee

Your Tasks

New Refresh Forward Delegate 21 User Tasks Filter Sort

Task Name	Assignee
Task Name AAA BE	-
Task Name BBB CC	Smith Arthur Walter
A Very Very Long T	Arthur Walter
Task Name XYZ	ohn... Arthur Walter
Task Name ABC	-
TaskName_ABC_00	alter -

Delegate Task

Recipient

Shelley Pickering

Your message (Optional)

Only one recipient permitted



Task delegated to Shelley Pickering. ✕

Floating confirmation alert

User Tasks

+ New

21 User Tasks



Search by keyword



Task Name	Job ID	Due Date	Priority	Created By	Assignee
Task Name AAA BBB CC	ID-MC3VM1-65023...	28-Apr-2015 12:00	High	System	-
Task Name BBB CCC DDD			Medium	Mandy Smith	Arthur Walter
A Very Very Long Task Na...	ID-MC3VM1-92748...	28-Apr-2015 14:30	Medium	System	Arthur Walter
Task Name XYZ	ID-MC3VM1-87390...		Medium	Stuart John...	Arthur Walter
Task Name ABC	-		Low	System	-
TaskName_ABC_001_12...	ID-MC3VM1-45425...		Low	Arthur walter	-

User Tasks (Library)

This is a list of all available user tasks, accessed from the sliding side-bar.

(Not to be confused with tasks that have been set and the user is a recipient)



User Tasks

56 Available User Tasks



Task Name	Task Type	Default Priority
Task Name AAA BBB CC DD EE FF GG HH	QA Process	Medium
Task Name BBB CCC DDD	Business Workflow	Medium
A Very Very Very Very Very Very Very Very Very Long Task Name...	Business Workflow	Low
Task Name XYZ	QA Process	High
Task Name ABC	Business Workflow	High
TaskName_ABC_001_12...	QA Process	Low
TaskName_ABC_001_12...	QA Process	Low

Clicking on a User Task will display the details page for that task.

These user tasks are created from the Workflows section using the Activi Workflow Modeller. Created user tasks are displayed here.