

Create a Workflow 



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Basic Configuration

There are some new features in the task form, for example, the autocomplete feature has some new options and from now on you can attach something to a task form. To learn more about those new options, see [Autocomplete Feature](#) and [Attachments](#).

Assign References to Tasks

Especially when executing workflows, tasks are very important. They are used for sending tasks to a user, which is quite useful as the user doesn't have to think about forgetting to complete a task. To learn more about how to add references to tasks, see [Assign References to Tasks](#).

Build Task Forms

The next step is to create a form for this task. These forms can be used to help users to complete the task. By applying business entity fields or workflow variables to a task, you have the possibility of using them to create forms.

The form builder is to be found in the **Quad Menu** of a task. On the left side of the form builder in the **Element** tab, all different kinds of fields you can use with drag and drop, are displayed.

Button

With buttons, you can check for example whether the task has been completed or not. But you can also navigate to another form through the button. With another button, you can create something like an approval, with selecting the same variable and the value which should be stored for the specific button when clicking it.



Label



This enables to enter random text or headings. The entered text can be configured as desired with font size, color, etc.

Picture



All kinds of pictures can be displayed here, with different ways to integrate them. They can be integrated over the **Process Portal** with a link, or simply from the **File System**. Last but not least it can also be integrated over an **Absolute URL**. This picture only needs to be loaded once. As soon as it is integrated once it can always be displayed.

Text Field



You should use the **Text Field**, especially for longer text. For example, for a description or something similar. Afterward, the entered text can be bound to a business entity field or workflow variable.

Date Picker



The **Date Picker** helps you to enter a date just by picking one of the displayed dates.

DateTime Picker



This is the same as the **Date Picker** but the time can also be selected and doesn't have to be entered manually.

Time Picker



As the **Date Picker** simplifies entering a date, so does the **Time Picker** simplify the input of time.

Check Box



With **Check Boxes** you can use variables of type boolean give the user options he can accept or refuse by checking and unchecking the **Check Box**. The decision can be stored in a business entity or a workflow variable.

Password Box




As the name already suggests the **Password Box**, is for the input of passwords. The chars will not be displayed but replaced by the typical password dots. Of course, it can also be stored in a variable or field of type password.

Web Component



This element is for websites. You only have to enter the specific **URL** and the link is clickable so, therefore, navigates to the specified website by clicking on the link.



File Picker
The **File Picker** enables to upload files and send those as an attachment to task.

List Box
The **List Box** can be filled with values, several columns can also be arranged. The values can also be set from a business entity. The values are displayed as a list and the selected value can be stored in a business entity field or workflow variable.

Combo Box
The **Combo Box** is a drop-down list which contains either manually set values or values from a business entity. The selected value can again be stored in a field or variable.

Radio Buttons
This is just another form of getting the user to select an option. It works like normal radio buttons. The values can be set and stored.

People Picker
With the **People Picker**, user from the active directory can be selected (similar to the SharePoint people picker). Their properties like the **Email address** or their **Login Name**, etc. can be stored in different business entity fields and workflow variables.

Table
The table can be filled with data either manually or over business entities. There are again business entity fields and workflow variables available to store selected values.

Comment
This is similar to a normal **Text Box** where comments can be entered.

In the **Business entity** tab, you can view all selected business entities of this task. With double-clicking one of the listed fields, they will be shown on the form designer. The small numbers mean how often they are used in the form.

Element	Business entity
Travel expense list	
Text	
Created By	1 ↓
Mileage	1 ↓
Point of arrival	1 ↓
Point of departure	1 ↓
Travel purpose	1 ↓
Travel time	1 ↓
Date	
Travel date	1 ↓
Workflow Variables	
Boolean	
Decision	1 ↑
Text	
Distance	1 ↓
Time	1 ↓

A task form can either be created with or without a grid. This option is to be configured in the only menu tab. There can be several things configured in the menu tab. You can **Add** and **Remove** a row or column there, as you can auto-generate the form. With **Add**, another form can be added, but this is not required very often.



When you added some fields to the form designer the properties of the particular field are displayed on the right side of the wizard. In the **Validation** tab, you can define rules to validate the fields. The fields in the designer are displayed corresponding to their type. For example, a date can be entered with a date picker.



Properties Validation

Element

Type: Date picker

Font

Source Sans Pro 10

Configuration

Read-only

Data binding: Travel expense list

Date

Travel date



To view an example of the generation of a task form, see [Configure Activity](#) where the business entities are added, and then, see [Create a Task-oriented Task Form](#).

Was this article helpful?

Yes

No

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