

Create a Workflow 



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Complete a Workflow Task

When executing workflows sooner or later, you will receive a task to complete. There are 3 ways to complete tasks. The first one is to complete the task directly over FireStart under **Tasks**. The second way is over the **Process Portal**. Third and last possibility to complete a task is over **Outlook**. The third way requires the installation of the **FireStart Outlook Add-In**, click [here](#) to get to the installation instructions. For the third way to work, there is also the **Mail Portal** binding required. This can be configured when assigning a user in charge or a role. When assigning a user in charge the chosen user can be modified by clicking on the yellow pen icon. Under the tab **Portal-Bindings**, you have now the possibility to check or uncheck the shown portals.

The tasks look quite the same on every platform, so therefore the completion is shown only shown once, as the process of completing the task is equal on every platform. As an example, the **Process Portal** will be used to complete the task.

The design of the task form depends on the type of task and process. As an example, we use a **Travel Expense Report** process where a task is sent to a user, who has to decide whether the travel expense is realistic and therefore pay them or if the employee will have to pay for that. First of the user has to accept or reject the task, if he rejects, the task will be assigned to another person.

 Check travel expense report



Travel Expense Report
from Danny Ocean

Entered by employee in SharePoint

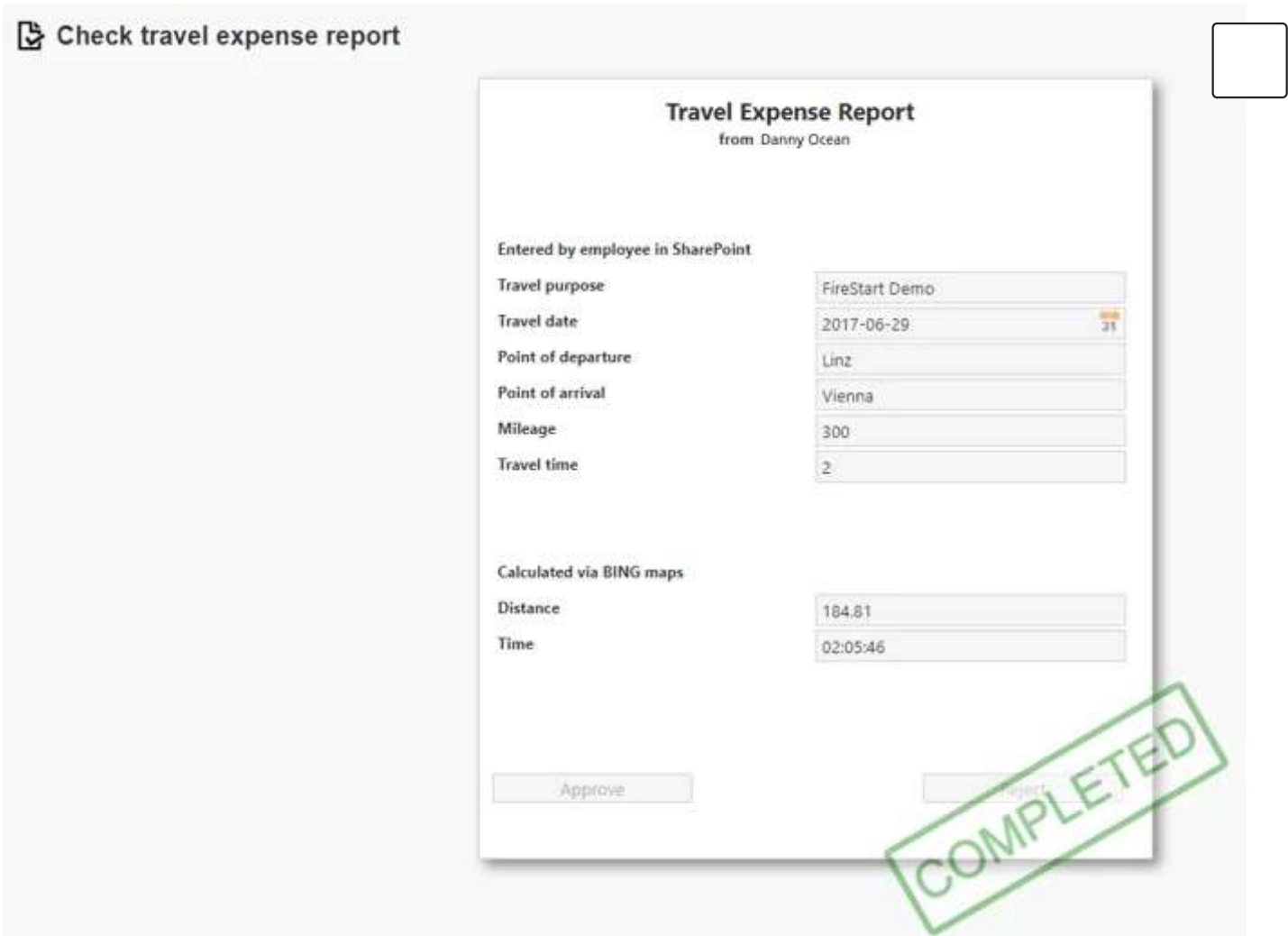
| | |
|--------------------|--|
| Travel purpose | FireStart Demo |
| Travel date | 2017-06-29 31 |
| Point of departure | Linz |
| Point of arrival | Vienna |
| Mileage | 300 |
| Travel time | 2 |

Calculated via BING maps

| | |
|----------|----------|
| Distance | 184.81 |
| Time | 02:05:46 |



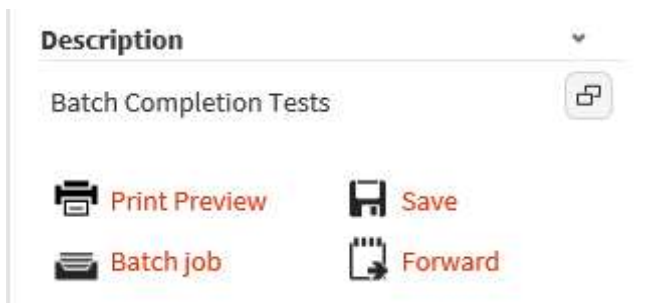
After accepting the task, it can be modified, but only if the fields are configured to store the data again. In this case, it can either be approved or rejected.



With that, you successfully completed a task.

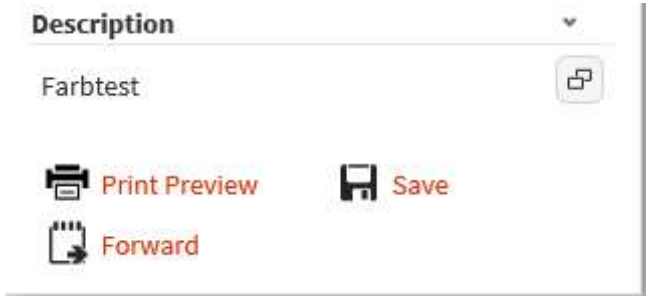
Batch Job

It is also possible to complete several tasks at once. For that functionality, there is a button called **Batch job** in the properties of a task. A typical use case for this functionality could be, that you have some activity failed tasks of the same type and want to cancel them all at once.

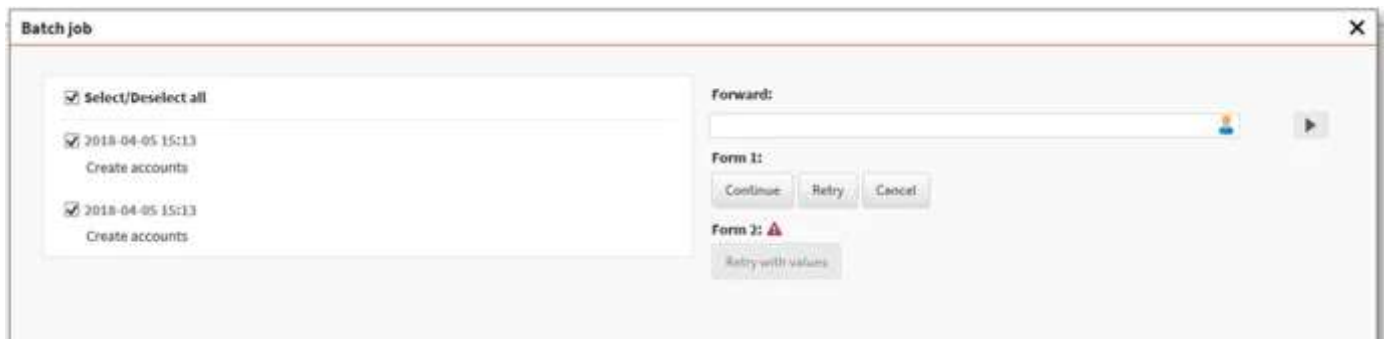


With clicking **Batch job**, a window opens which shows some features to use for tasks of the same version as the task currently opened. This feature won't be available if the

currently opened task includes some validation rules (e.g., Regular Expressions), which is shown below.



On the left side of the opened window all tasks of the same version, which are assigned to the user, are displayed. The timestamp shown is from the time the task has been sent. The right side consists of a People Picker which enables to choose a user to forward the task to. Below the People Picker, you can find all buttons of the form. They are grouped by form in case a task also has sub-forms. Only those buttons are displayed, which complete a task. Those who navigate to a sub-form are not listed.



All selected tasks (on the left side) will be completed, as soon as the user clicks a button. In case one of the buttons is configured to write a value to a business entity, this will also happen when completing tasks over the batch job.

Caution: If a part of the form is already filled out, all modifications will be discarded when completing the task via the batch job.

If the form consists of mandatory fields, the buttons cannot be clicked as they are disabled.