

Flowable Work

This topic explains the concepts and features of Flowable Work. All of the features provided in Flowable Work are also available in Flowable Engage.

What is Flowable Work?

Flowable Work is a flexible technology for delivering dynamic and adaptive process and case management solutions.

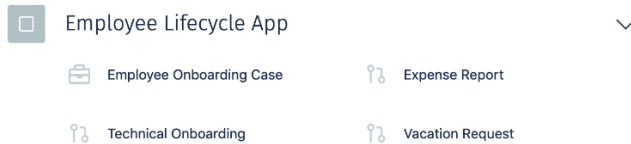
With Flowable Work you can model your business application, through processes, decision rules, case structures and forms. Visual editing tools make it easy for the business modeler – expert or citizen developer – to create rich and sophisticated business models. These models can then be executed dynamically by Flowable Work to deliver an adaptable business application. This enables a solution to be continuously improved, being as agile as the circumstances require. Flowable Work is built on the trusted and highly scalable open source [Flowable Engine](#), which provides the engines for driving models defined with the open standards BPMN, CMMN and DMN.



Main Concepts

Flowable App

A **Flowable App** contains all types of models and configurations to support a specific aspect or area of your organization. An App can be deployed and all of its models become available to drive the behavior of your work items. For instance, you could have a Flowable App that contains all the work items related to an *Employee Lifecycle*.

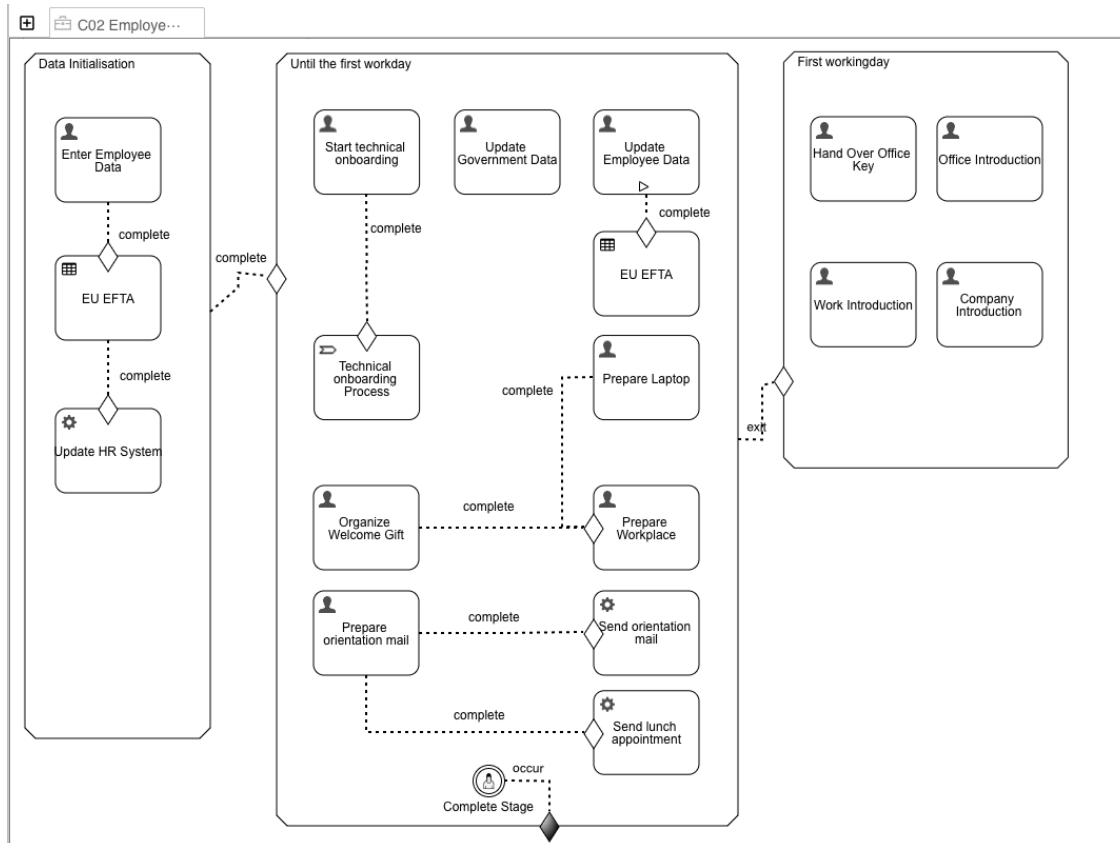


Work Item

Flowable organizes everything you do around the concept of **work items**. No matter whether you start a new **case** or **process**, both are work items and support a common set of functionalities like ownership and assignment, due date and priority. Forms are used to manage the data associated with work items. Work items can have relations with each other and support hierarchies. The behavior of a work item is driven by its model, which is called a definition. For instance, a process is driven by its process definition, which is modeled using the modeling standard [BPMN 2](#). These models can be designed and configured within the [Flowable Design](#) application.

Case

A **case** (also referred to as a **CMMN case**) acts as the main context around a collection of work items and information. A case can represent many things, depending on how you define it. Think of a case like a box with a label where you can find everything that you need to work on a particular task. There are small and large boxes, square and round ones, boxes with one compartment only or boxes with many compartments to organize the contents. For example, if you handle customer complaints with Flowable Work, a single "complaint" could become a case and everything that happens while solving that complaint can be stored in and made available in that case. Alternatively, if you use Flowable Work for your recruiting, each job applicant is represented by a case where all structured data like name, birthday, etc. for the applicant is part of the case form and documents like CV and references are simply stored within the case as attachments. Another excellent fit for Flowable Work is request and approval handling where a vacation request, a travel request or even a request for a quote from a customer becomes a case, supporting the handling and approval process through Flowable Work. The lifecycle of a case is represented by **Stages** that allow you to break the business problem down into a set of phases to resolve a case.



Process

A **process** describes the tasks and steps that must be followed, including collecting information from people and interacting with other computer systems and services, in order to fulfill a specific objective. A **process** model encapsulates best practices or mandatory procedures for an organization.



Task

A **task** (also referred to as a human task) is a step that can be inside a **case**, a **process** or completely isolated. At its bare minimum, a task should contain a name, an assignee and

either a description of what needs to be done to complete the task or a **form** that the assignee needs to fill to complete the task.

Task

Escalated loan review

Created: 3 days ago

Assignee: Flowable Admin

Due: No due date

AcceptRejectEscalateSave

Task

People

Subtasks

Documents

Full name

Giuseppe Mario

Age

37

Home

☒ Rented

☐ Mortgaged

☐ Owned

Nationality

Italian

Requested loan

500000

Salary

65000

Advice

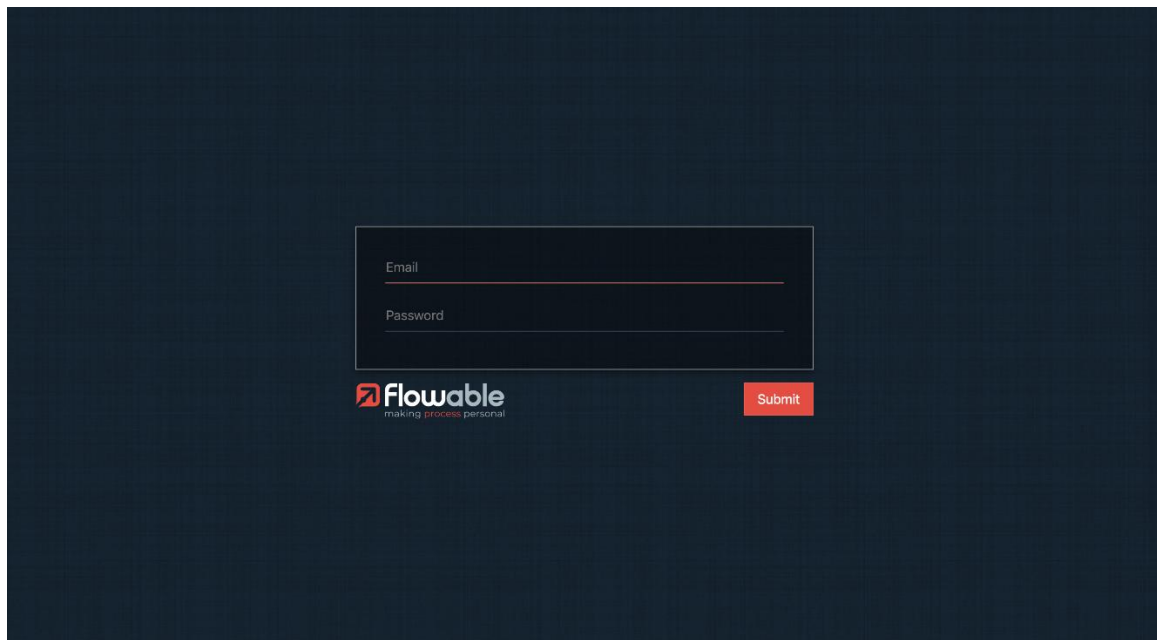
No collateral, so consider viability

Getting Started

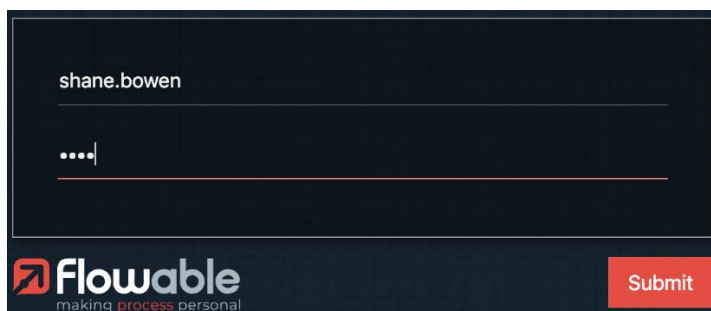
To access Flowable Work you need to type in the navigation URL into your browser. Once the page is loaded, the login page appears.

NOTE

Your system administrator should provide you with the URL. The URL is typically something like `https://<hostmachine>:<port>/flowable-work/`.

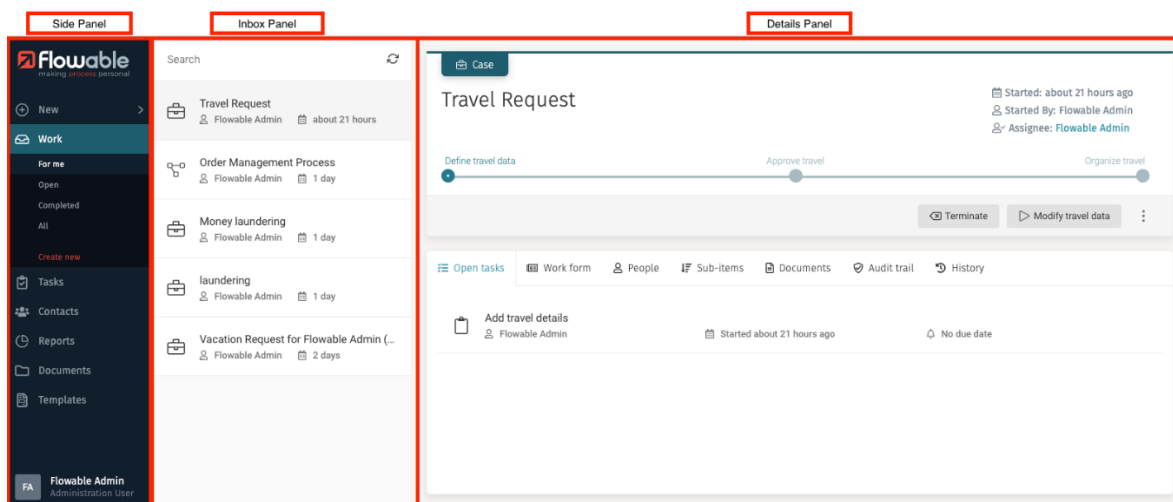


In order to log in, you need to type in your login and password on the form and click on the Submit button.



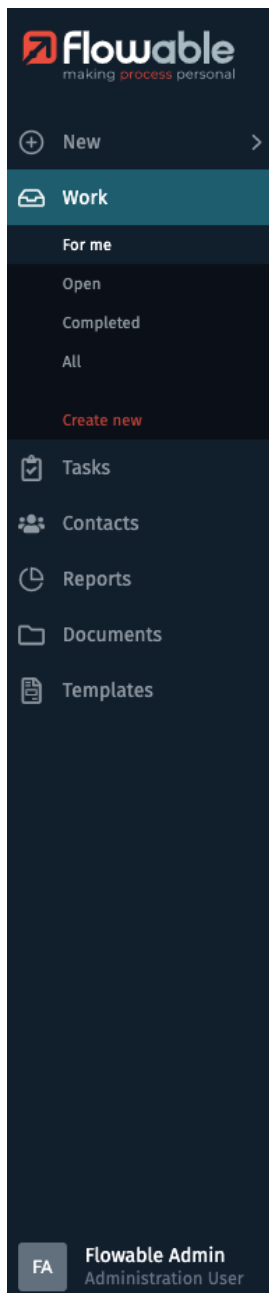
User Interface

This is the main Flowable Work web interface that appears after logging in:



Side Panel

The **side panel** contains the main navigation of Flowable Work. It helps you to orient yourself within the application.



On the top you can find the `New` button. It allows you to create work items (cases or processes).

The next button is `Work`. When clicking on it, you are routed to your work Inbox, that displays all your work items. It also expands the `Work` menu to show different submenu items. Each of the submenu items is configured to only display a specific subset of work items in your inbox, e.g., show only work items where you are involved or show only completed work items.

Below the `Work` button is the `Tasks` button. When clicking on the button you are routed to your task Inbox, which displays all your tasks. It also expands the `Tasks` menu to show

different submenu items. Each of the submenu items is configured to only display a specific subset of tasks in your inbox, e.g., show only tasks where you are involved or show only tasks that are not assigned to anybody.

In the **Contacts** section you can manage your contacts, e.g., you can find the details of the user profiles with which you can interact.

The **Reports** section lets you access a dashboard that provides a quick overview of application usage.

NOTE

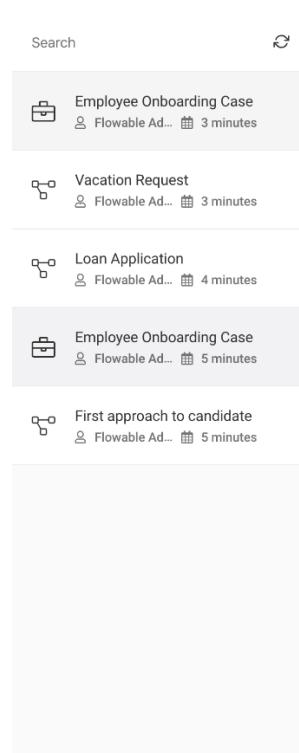
Depending on the configuration of your web application and the individual user permissions, you may only see some of the menu items in the side panel.

NOTE

Besides the default menu, other applications of the Flowable Portfolio can be integrated into the user interface.

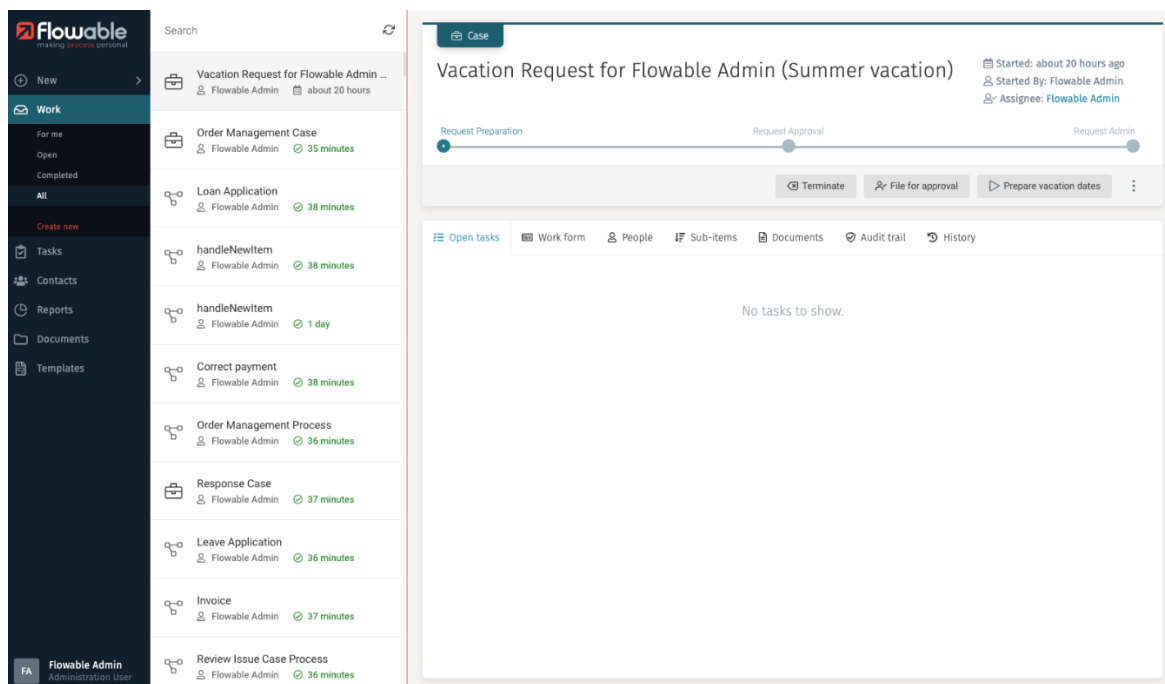
Inbox Panel

The inbox panel has two main areas: a search box and a list section. In the list section items that match the selected criteria from the selected option of the side panel combined with the typed search characters are shown. For example, if you select **Work** and **For me** in the submenu, you only see work items where you are involved.



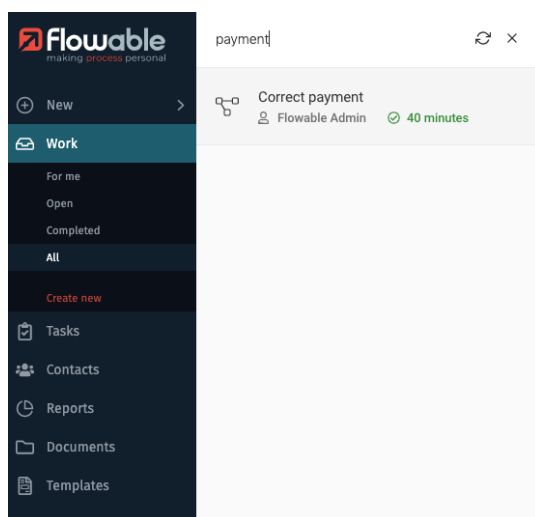
TIP

You can resize the inbox panel to make it wider by placing your mouse in the dividing line between the inbox and the details panel until it changes to a horizontal resize one, then click and resize to your liking.



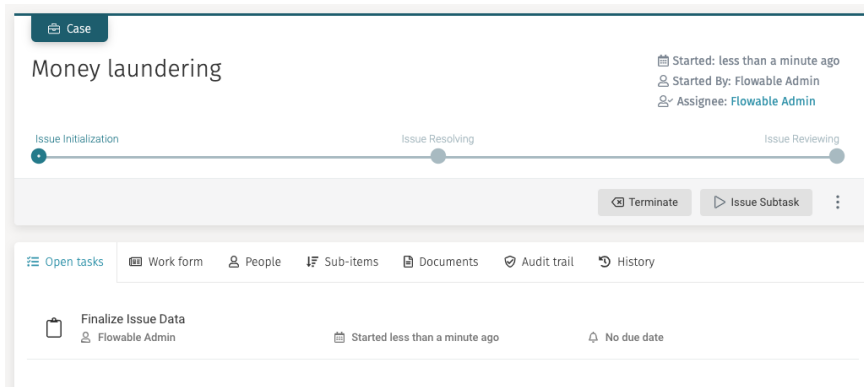
Search Box

At the top of the inbox, you can find a **search field** that lets you search by name in the displayed list and a refresh button. You can type the full name or even a part of it. To clear your search, press the X button.



Details Panel

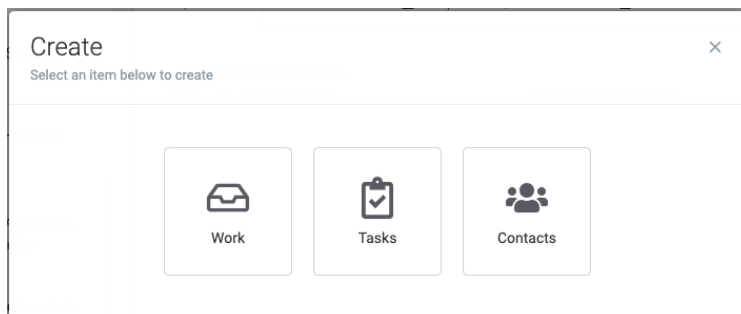
The details panel shows the information on the selected item from the inbox panel, letting you overview all case related data, interact with a form if there is one, view the different steps of a process, etc.



Create New Items

The **New** function lets you create a new **Work**, **Task** or **Contact** item.

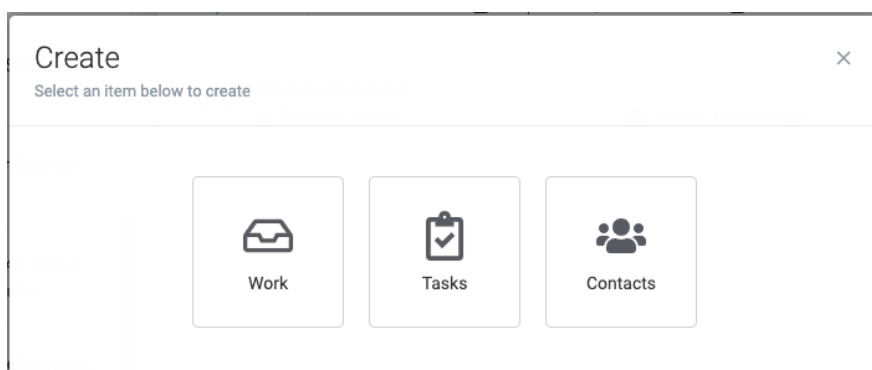
When clicked, a dialog opens in the middle on the screen to select which item you want to create:



New Work

The **New** function lets you create new a **Work**, **Task**, or **Contact** item.

When clicked, a dialog opens in the middle of the screen to select which item you want to create:



If the first option **Work** is chosen, the list of available **cases** and **processes** are shown, grouped by **Flowable App**, letting you select which one you want to create. The list is scrollable using your mouse wheel and contains a search box to search by name. You can also collapse app sections for better reading.

Create

Search

×

Select an item below to create

*

SA01 - Vacation Request App

▼

🔗

P00 - Empty Process

🔗

SC01 - Vacation Request

🔗

SP01 - Initialize Vacation Request Case

🔗

SP02 - Vacation Request Approval Process

🔗

SP03 - Request Feedback Process

📎

Attachment review app

▼

🔗

P01 - Attachment test

*

Default Desk and Ticket App

▼

🔗

P10 - Initialize Desk Conversation Process

📎

Best Case

▼

After selecting which work item you want to create, if there is an init form associated to the work item, it would open as a new dialog showing the form so that you can enter the initial values for it, for example:

Create case or process

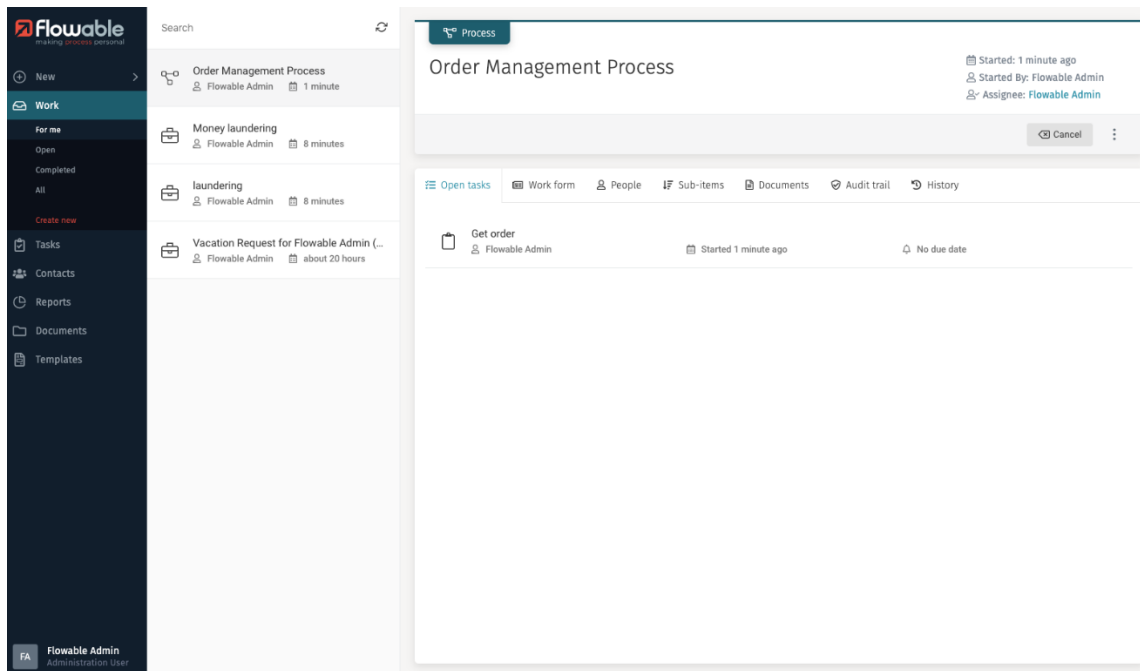
×

Full name *

Submit

Cancel

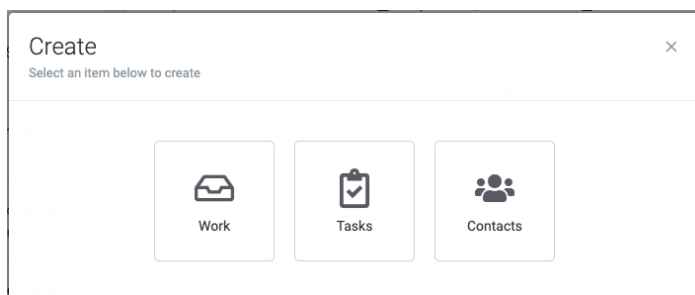
After filling the init form (if there is one), the navigation would take you to the corresponding section of the side panel according to the item you have created, have it selected in the inbox panel, and it is shown in the details panel.



New Tasks

The **New** function lets you create new a **Work**, **Task**, or **Contact** item.

When clicked, a dialog opens in the middle of the screen to select which item you want to create:



If the second option **Tasks** is chosen, the window for creating a new **Ad hoc task** appears with a simple form that you need to fill to create it. Only the *name* is required, as it serves to identify the task in the tasks list. The other two optional fields are *Assignee*, in case you want to assign the task to a particular member of your organization, and *Description*, which you can use to describe what the task involves, and what needs to be accomplished for someone to complete the task. Once you have filled the fields, you can press the **Submit** button to create it. At any time you can click on **Cancel** and the task is not created.

Create task

×

Name *

Report time spent on meetings to your manager

Assignee

Flowable Admin

×

▼

Due date

2019-08-15

Description

Report the number of hours spent on meetings to Amanda Long

Submit

Cancel

TIP

You can use some [Markdown](#) features to format the description message.

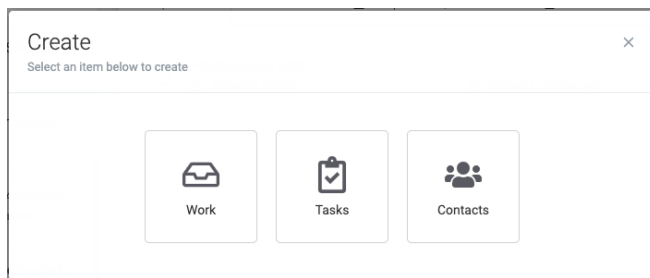
After creating the ad hoc task, the Task main option is selected, and the task is shown in the inbox list, and its details are shown in the details panel. The description of an ad hoc task is displayed below its title.

The screenshot displays the Flowable application interface. On the left is a dark sidebar with navigation options: New, Work, Tasks (selected), For me, Unassigned, Open, Completed, All, Create new, Contacts, Reports, Documents, and Templates. The main area is divided into two panels. The left panel shows a list of tasks: 'Report time spent on meetings to your ...' (assigned to Flowable Admin, due in about 1 month), 'Get order' (assigned to Flowable Admin, no due date), and two instances of 'Finalize Issue Data' (assigned to Flowable Admin, no due date). The right panel shows the details of the selected task, 'Report time spent on meetings to your manager'. It includes the description 'Report the number of hours spent on meetings to Amanda Long', a 'Complete' button, and a menu icon. Below the task title, there are tabs for Task, People, Subtasks, Documents, and History. The main content area of the details panel states: 'This task has no additional information to show or collect.'

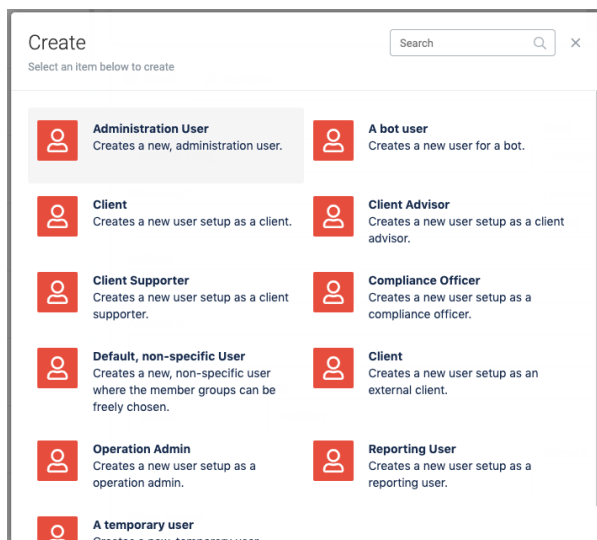
New Contacts

The **New** function lets you create new a **Work**, **Task**, or **Contact** item.

When clicked, a dialog opens in the middle of the screen to select which item you want to create:



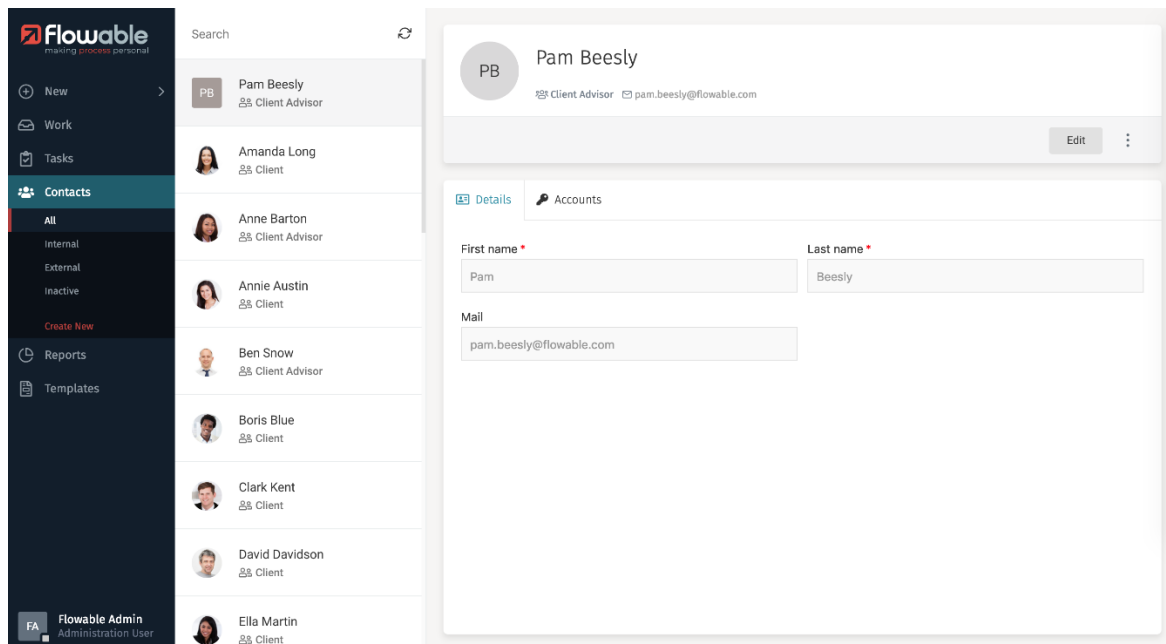
If the third option **Contacts** is chosen, a window appears which lets you select the **profile** (also called technically **user definition**) of the user you want to create. The profile of the contact determines which functions he can access and perform.



After selecting the profile, the window shows the fields needed for creating the contact. Mandatory fields are marked with a red asterisk (*) and the fields that are shown are determined by the profile that was selected. For example, to create an external client, you need to select a Client advisor for him. Once you have filled in all mandatory fields, you can press the Submit button.

The screenshot shows a form titled "Create contact" with a close button (X) in the top right corner. The form contains several fields, some of which are marked with a red asterisk (*) indicating they are mandatory. The fields are: "Display name" (with the value "Pam Beesly"), "First name" (with the value "Pam"), "Last name" (with the value "Beesly"), "Login name" (with the value "pam.beesly"), "Email" (with the value "pam.beesly@flowable.com"), "Password" (with the value "****"), and "Repeat password" (with the value "****"). At the bottom right of the form, there are two buttons: "Submit" and "Cancel".

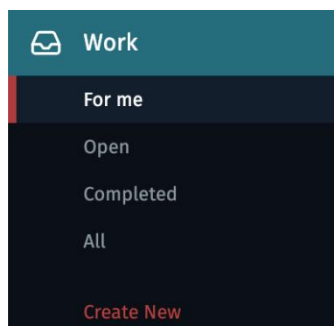
After creating the contact, the window closes, the Contacts main option is selected in the side panel, and your recently created contact is loaded into the details pane.



Work

The **Work** button lets you access the list of created work items.

When you click on **Work** the inbox loads the list of work items that are *for me*, and it expands the list of other available filters for work items. The button for creating a new work item is also shown.

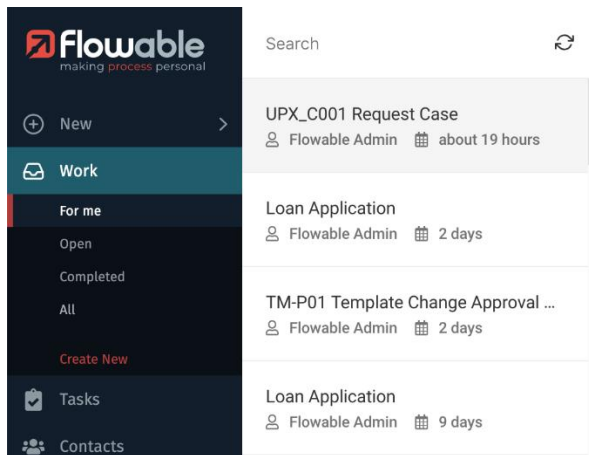


Work Inbox

The Work Inbox shows you work items based on the filter you have selected in the expanded list. For example, if the **For me** filter is selected in the submenu, you only see work items where you are involved.

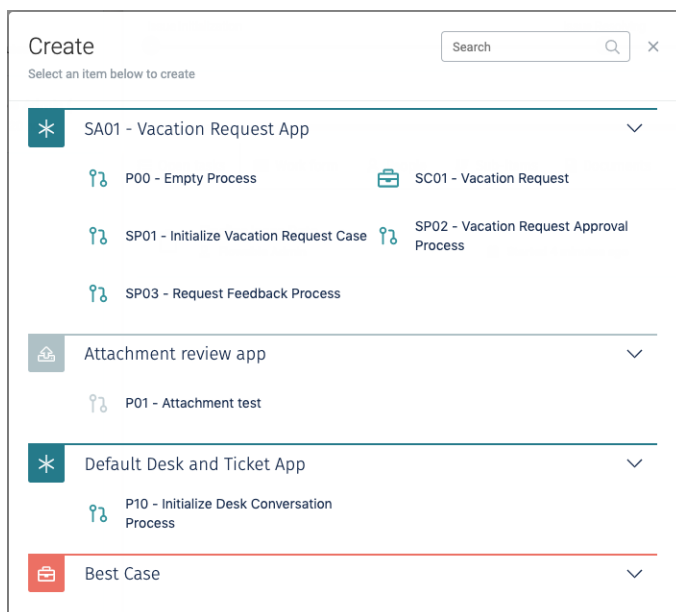
NOTE

The work items are ordered by *Creation date* descending, thus showing the most recent items first.



Creating New Work

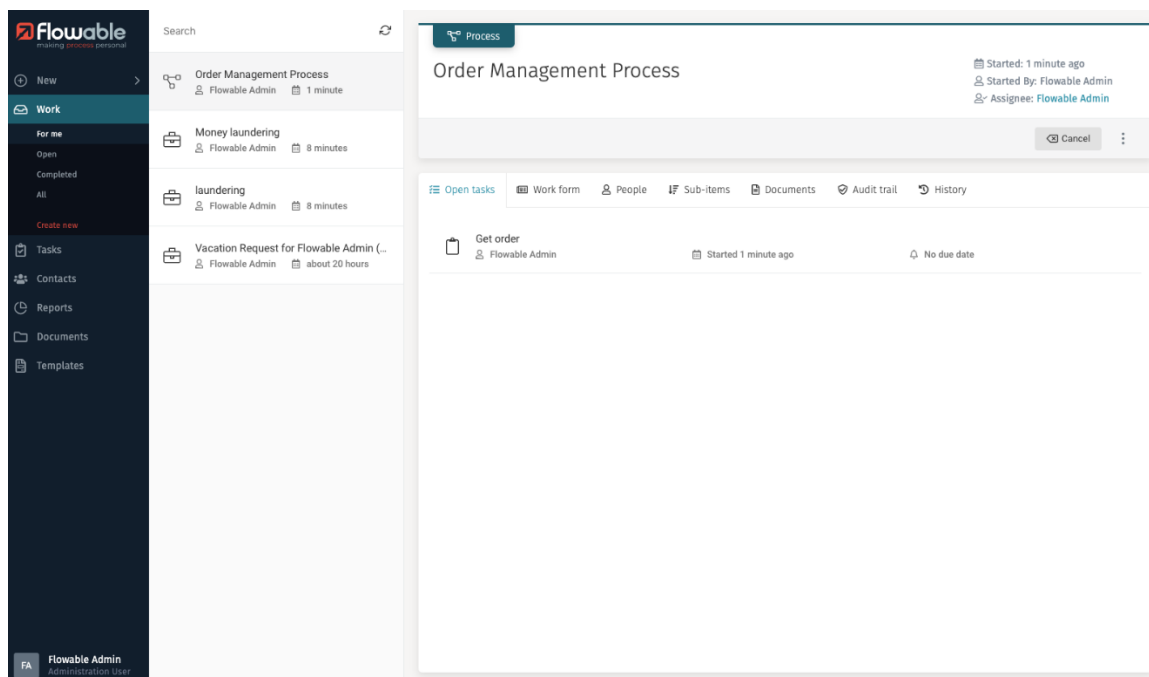
Similar to the [New](#) button, when you click on **Create new**, a window appears to select which case or process you want to start. The list is scrollable using your mouse wheel and contains a search box to search by name.



After selecting which work item you want to create, if there is an init form associated to the work item, it would open as a new modal window showing the form so that you can enter the initial values for it, for example:

The screenshot shows a 'Create case or process' modal window. It has a title bar with a close button. Below the title is a label 'Full name *' followed by a text input field. At the bottom right are two buttons: 'Submit' and 'Cancel'.

After filling the init form (if there is one), the navigation would take you to the corresponding section of the side panel according to the item you have created, it is selected in the inbox panel, and it is shown in the details panel.

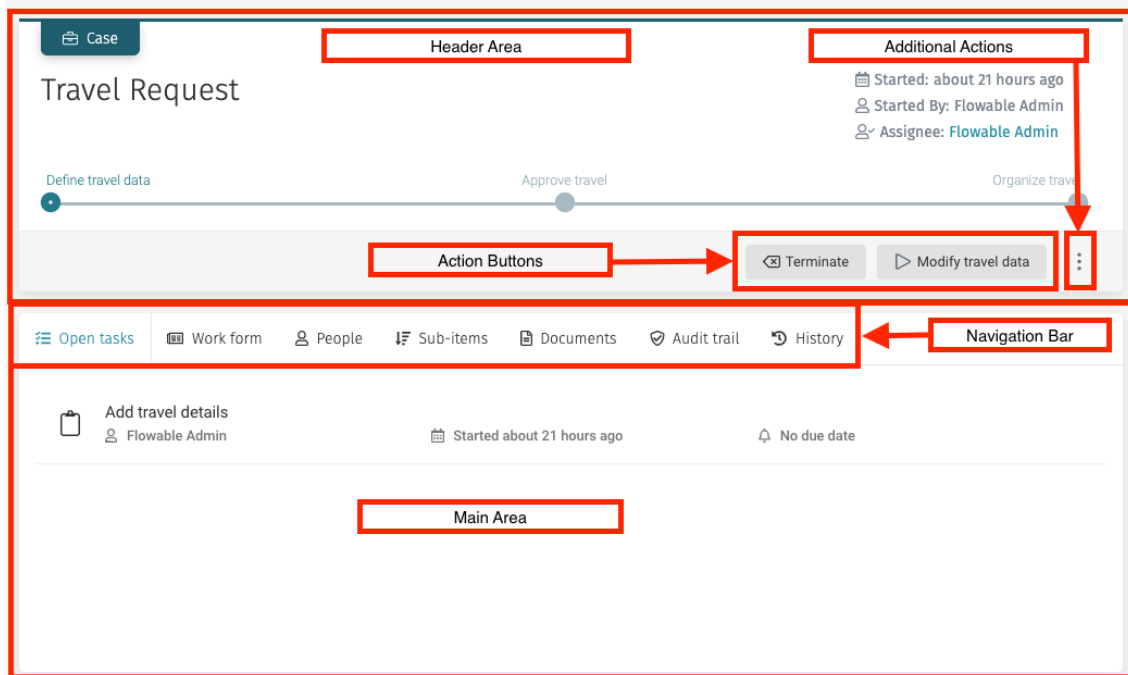


Work Details

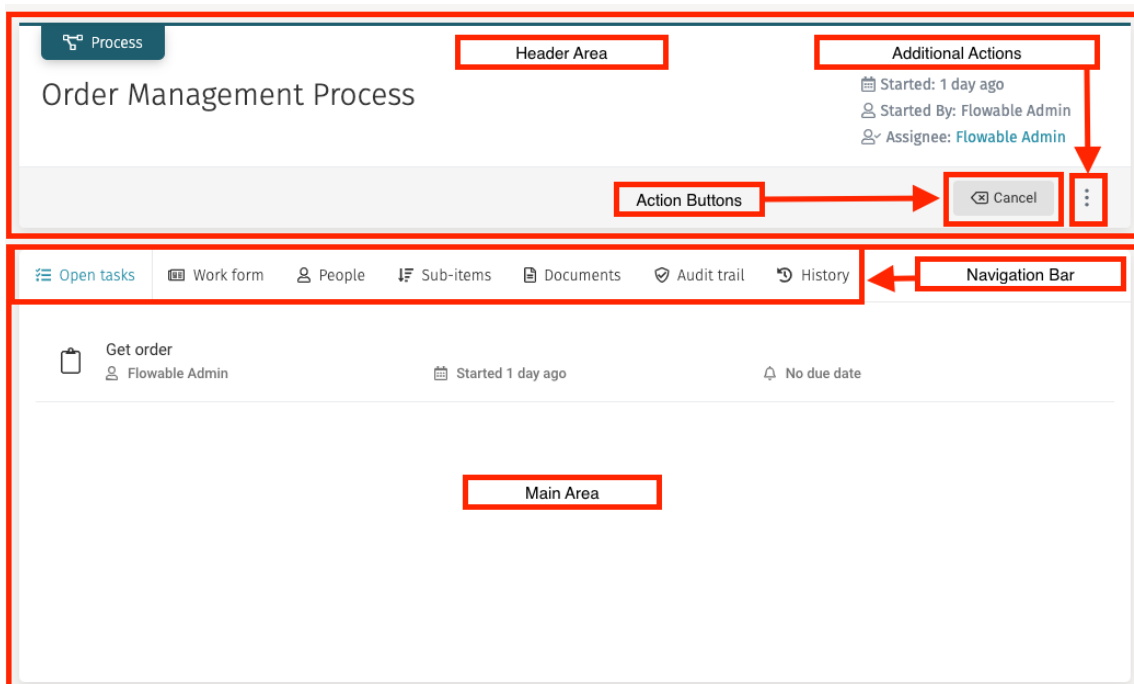
The details panel of a selected work item contains all the information about the item, a navigation bar to see more details, a button for additional actions, and a main area to interact with the selected work item.

The Work Details panel differs from a **case** to a **process** slightly:

Case



Process



Header

The header contains the name of the work item when it was started and by whom, and a button to perform additional actions.

If the work item is a case, it might show the action buttons that have been modeled for it as well as its stages, which are shown in the form of a multistep diagram, showing completed and pending stages.

Case

Vacation Request for Flowable Admin (Summer vacation)

Started: 1 day ago
 Started By: Flowable Admin
 Assignee: Flowable Admin

Request Preparation Request Approval Request Admin

Terminate File for approval Prepare vacation dates ⋮

If the work item is a descendant of another work item (for example, a process that is created inside a case), a navigation link to the parent work item is shown and clicking on it loads the details of that work item, similar to the one that appears when selecting a task inside a case.

Task

Work Introduction

Created: about 1 hour ago
 Assignee: Flowable Admin
 Due: No due date

Employee Onboarding Case

Complete Save ⋮

Open Tasks

If the Open Tasks tab the list of visible open tasks from the work item is displayed in list form. You can then click on a task, and the task details view is shown.

Open tasks Work form People Sub-items Documents Audit trail History

Attach additional identification Flowable Admin	Started 2 minutes ago	No due date
Capture details Flowable Admin	Started 3 days ago	No due date

Work Form

A work item can have a work form, that is designed in the Flowable Modeler. When selecting this option, the work form is displayed.

Open tasks **Work form** People Sub-items Documents Audit trail History

Request Overview

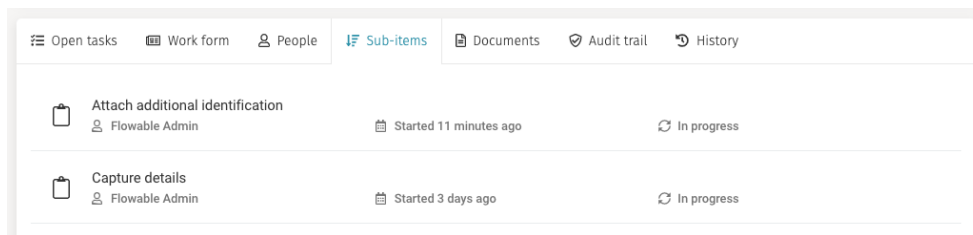
Vacation dates

From date * To date *

2019-08-01 2019-09-01

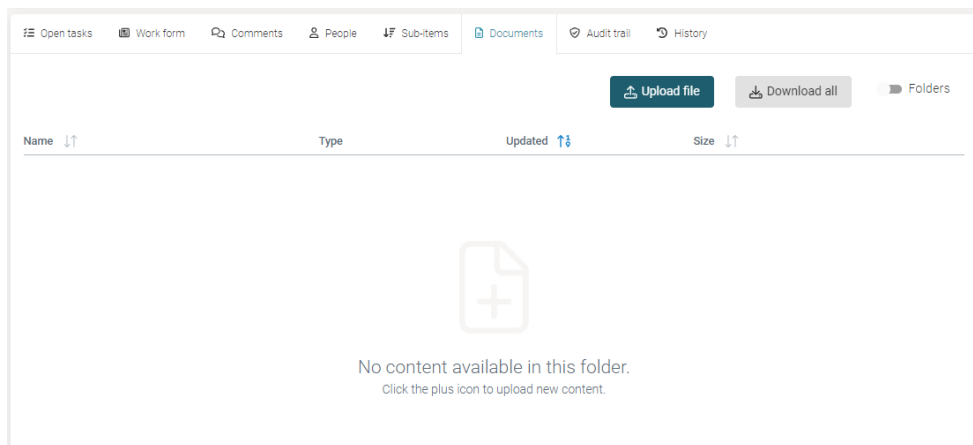
Sub-items

In this tab, you can view the hierarchy of work items and tasks that are descendants of the selected work item. For example, you can view the tasks that are part of your process. This list is scrollable.



Documents

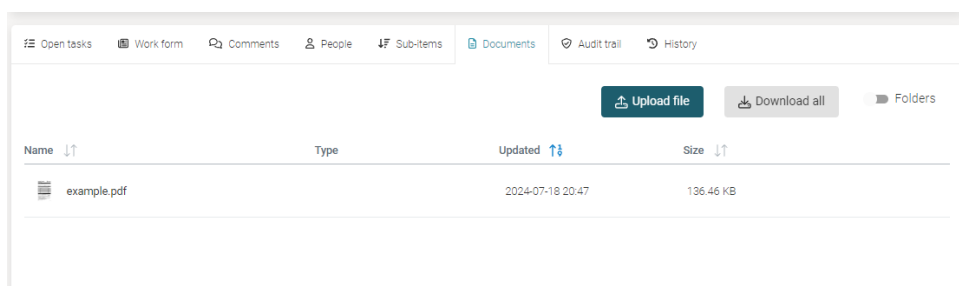
In the documents tab, you can attach files to the work item, view already attached files and delete attached files.



To attach a new file, you can drag and drop new files into the dotted box or click on the link, and a window for choosing the file from your system is opened.

v3.16.0+

Click on **Download all** to retrieve all files in that current folder (and its subfolders) in a zip file.



To delete a document, click on the button represented by the three dots and select **Delete file**.

You can add metadata to document by same button and select **Add content type**. This selection opens a panel below where you can enter the content type (for example *Contract*)

and based on the selected content, additional fields appear. To save your metadata, you have to press the **Save** button in the header area.

The screenshot shows a metadata form for a file named '10.pdf'. At the top right, there is an 'Upload file' button and a 'Folders' toggle switch. Below this is a table with columns: Name, Type, Updated, and Size. The table contains one row: '10.pdf', 'Contract', 'Jul 15, 2019', and '22.72 KB'. Below the table, there are two input fields: 'Name' and 'Contract number'. To the right of 'Contract number' is a 'Contract type' field. At the bottom right, there are 'Save' and 'Cancel' buttons.

Name	Type	Updated	Size
10.pdf	Contract	Jul 15, 2019	22.72 KB

Name *

Contract number *

Contract type *

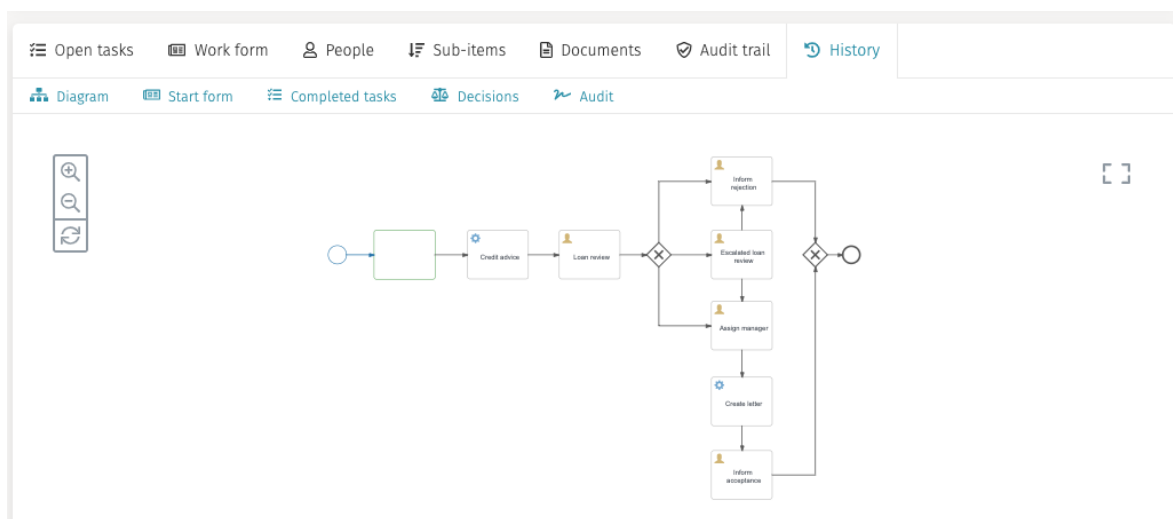
Save Cancel

History

The history tab contains several subtabs:

Diagram

The diagram tab shows the CMMN or BPMN diagram of the respective work item, showing in different colors the steps that are completed, active, and pending.



- You can zoom in or out by using your mouse scroll wheel or the buttons.
- You can move around the diagram by left-clicking and dragging in the diagram area.
- You can view the diagram in full screen by clicking the upper-right corner frame icon. To exit from the full screen view, click the **X** button in the upper-right corner.

Start form

The start form tab shows the data that was filled in the start form when the work item was created.

Open tasks
Work form
People
Sub-items
Documents
Audit trail
History

Diagram
Start form
Completed tasks
Decisions
Audit

Full name *

Jane Doe

Completed tasks

In the completed tasks tab, you can view all the previously completed tasks of the work item and review their forms.

Open tasks
Work form
People
Sub-items
Documents
Audit trail
History

Diagram
Start form
Completed tasks
Decisions
Audit

Loan review
Flowable Admin
Completed 16 minutes ago

Capture details
Flowable Admin
Completed 3 days ago

Decisions

If your work item has executed at least one **decision table** (also referred to as a DMN table), this tab shows a detailed analysis of the decisions that were taken based on them.

When you click on the rules column value for a particular decision table execution, the DMN table is shown, highlighting the matching rules and the outcome.

Work form
People
Sub-items
Documents
Audit trail
History

Diagram
Start form
Completed tasks
Decisions
Audit

Decision name
Rules
Result
Input

Credit Advice
4
guidance: No guidance
nationality: german, requestedLoan: 10, initiator: ...

FIRST	Age {age} (number)	Status {home} (string)	Credit Guidance {guidance} (string)
	35	owned	No guidance
1	< 24	-	"Young, so need further checks"
2	-	== "rented"	"No collateral, so consider viability"
3	> 60	== "mortgaged"	"Potentially overstretched debt to consider"
4	-	-	"No guidance"

You can also click on the input to review the values that were in the process and so potentially taken into account by the decision table to match its rules by clicking on the value in the input column.

Work form	People	Sub-items	Documents	Audit trail	History
Diagram	Start form	Completed tasks	Decisions	Audit	
Decision name	Rules	Result	Input		
Credit Advice	4	guidance: No guidance	nationality: german, requestedLoan: 10, initiator: --		
Input Name	Value	Value Type			
nationality	german	string			
requestedLoan	10	number			
initiator	admin	string			
fullName	John Smith	string			
salary	100000	number			
form_flow_73d93b3ac9c6_outcome	true	string			
age	35	number			
form_flow_details_outcome	COMPLETE	string			
home	owned	string			

Finally, if you click on the result value, the results of the decision table are shown.

Work form	People	Sub-items	Documents	Audit trail	History
Diagram	Start form	Completed tasks	Decisions	Audit	
Decision name	Rules	Result	Input		
Credit Advice	4	guidance: No guidance	nationality: german, requestedLoan: 10, initiator: --		
Output Name	Value	Value Type			
guidance	No guidance	string			

Audit

The audit tab shows a scrollable list of all the different events that have happened to the work item, ordered by creation date ascending.

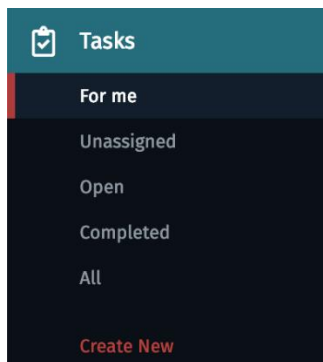
Work form	People	Sub-items	Documents	Audit trail	History
Diagram	Start form	Completed tasks	Decisions	Audit	
startEvent	-	Started at 13:07 12/07/2019	Ended in 0 seconds		
Capture details	admin	Started at 13:07 12/07/2019	Ended in 39 minutes	Go to task	
sequenceFlow	-	Started at 13:07 12/07/2019	Ended in 0 seconds		
Credit advice	-	Started at 13:47 12/07/2019	Ended in 0 seconds		
sequenceFlow	-	Started at 13:47 12/07/2019	Ended in 0 seconds		

Tasks

The **Tasks** button lets you access the list of created tasks.

A work item most probably contains some **tasks** that must be completed by you or your team in order to accomplish the objective of that work item. For example, if you have a Loan Review process, it is very likely that you have a task that revolves around collecting the requestor financial information, such as income, the amount requested, nationality, etc.

When you click on **Tasks** the inbox loads the list of tasks that are *for me*, and it expands the list of other available filters for tasks. The button for creating a new task is also shown. But keep in mind that this newly created task is somehow special: it creates what is called an **ad hoc task**. An ad hoc task is different from a task in the sense that it does not belong to the hierarchy of a work item: it is not part of a process or a case. Also, an ad hoc task does not have a form associated to it. It only contains four fields: *name* of the task, *assignee*, *due date*, and *description* (only the *name* is required).

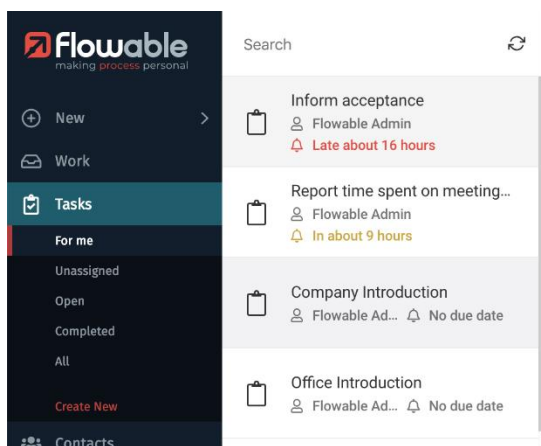


Task Inbox

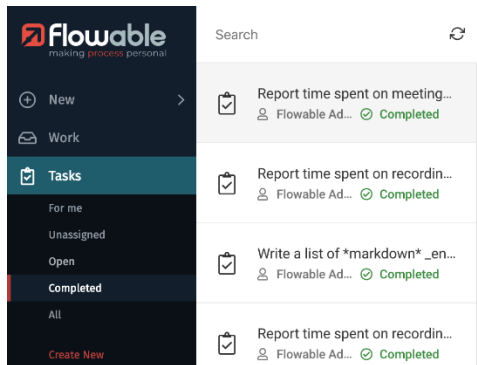
The Tasks Inbox shows you tasks based on the filter you have selected in the expanded list. For example, if the **For me** filter is selected in the submenu, you only see tasks you are assigned to.

The ordering of the tasks depends on the filter you have selected:

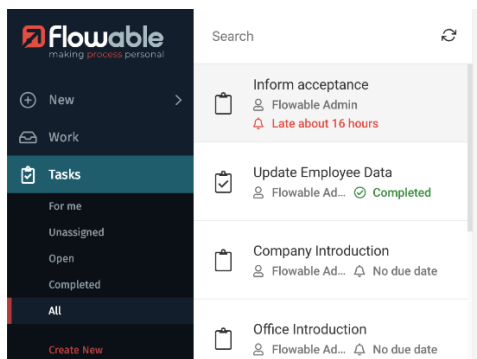
- For the filters **For me**, **Unassigned**, or **Open** tasks the order is the combination of: by due date ascending, by priority descending and by creation time descending. This means that tasks that have their due date close are on top, then for the ones that have the same due date the ones with highest priority and then the ones that were most recently created.



- For the filter **Completed** tasks the order is by completion date descending, meaning that most recently completed tasks are shown on top of the list.



- For the filter **All** tasks the order is by creation date descending, meaning that most recently created tasks are shown on top of the list.



Creating New Ad Hoc Tasks

When you click on the **Create new** item under the **Tasks** section, a window appears with a simple form that you need to fill to create a new ad hoc task. Only the *name* is required, as it serves to identify the task in the tasks list. The other two optional fields are *Assignee*, in case you want to assign the task to a certain member of your organization, and *Description*, which you can use to describe what the task involves, and what needs to be accomplished in order for someone to complete the task. Once you have filled the fields you can press the `Submit` button to create it. At any time you can click on `Cancel` and the task is not created.

Create task

×

Name *

Report time spent on meetings to your manager

Assignee

Flowable Admin

×

▼

Due date

2019-08-15

Description

Report the number of hours spent on meetings to Amanda Long

Submit

Cancel

After creating the ad hoc task, it appears in the inbox list, and its details are shown in the details panel.

Flowable

New

Work

Tasks

For me

Unassigned

Open

Completed

All

Create new

Contacts

Reports

Documents

Templates

FA Flowable Admin Administration User

Search

Report time spent on meetings to your ...

Flowable Admin In about 1 month

Get order

Flowable Admin No due date

Finalize Issue Data

Flowable Admin No due date

Finalize Issue Data

Flowable Admin No due date

Task

Report time spent on meetings to your manager

Report the number of hours spent on meetings to Amanda Long

Created: less than a minute ago

Assignee: Flowable Admin

Due: In about 1 month

Complete

⋮

Task

People

Subtasks

Documents

History

This task has no additional information to show or collect.

If you look at the top right of the details panel, there is a **Complete** button. By clicking on this button, you are informing that the task has been performed and mark the task as completed.

Task Details

The details panel of a selected task contains all the information about the task, a navigation bar to see more details, a button for additional actions, and a main area to interact with the selected task.

Header Area

Additional Actions

Outcome Buttons

Navigation Bar

Main Area

Header

The header contains the name of the task, when it was started and by whom, a link to the work item that contains the task (not shown if the task is an ad hoc tasks as ad hoc tasks are not related to a work item), a button to perform additional actions, and the **outcome** buttons.

If you click on the link to the work item, it navigates to the corresponding work item to display its details panel and the **Work** inbox is displayed.

The *Task* ribbon on top of the header is shown in different colors to quickly display information about the task

Task Condition

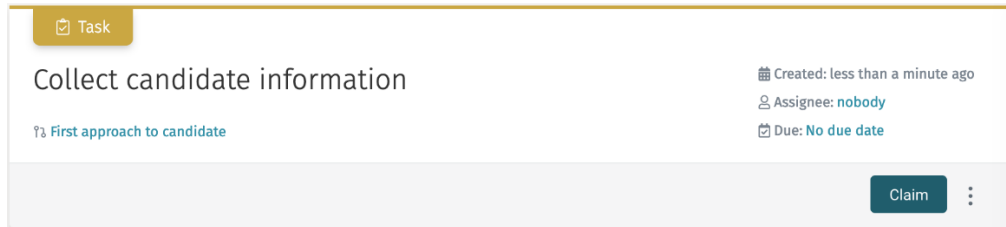
Ribbon Color

Assignee set, no due date	52 tasks details header task grey
Due date set in the future	52 tasks details header task yellow
No assignee	52 tasks details header task yellow
Due date reached	52 tasks details header task red

Assignee

The assignee field in the header shows the current assignee of the task.

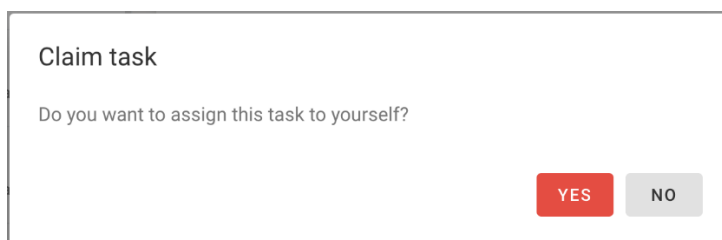
If there is no assignee, the text *nobody* is shown, and the outcome buttons are replaced by a **Claim** button.



NOTE

If there is no assignee, the *Task* ribbon on top of the header is shown as yellow.

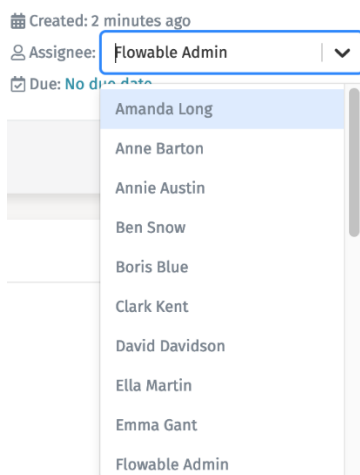
Claim lets you set yourself as assignee. When you click the **Claim** button, a window for you to confirm that you want to assign the task to yourself. Once you click on **Yes**, you are the assignee of the task, and the outcome buttons are replaced back.



NOTE

A task cannot be completed without an assignee.

If you have the appropriate permissions, you can change the assignee of the task at any moment by clicking on the name of the assignee. Once you click, a search list appears where you can select directly which user you want to set as assignee.



TIP

You can type some letters of the user name you want to search for to aid you in the selection.

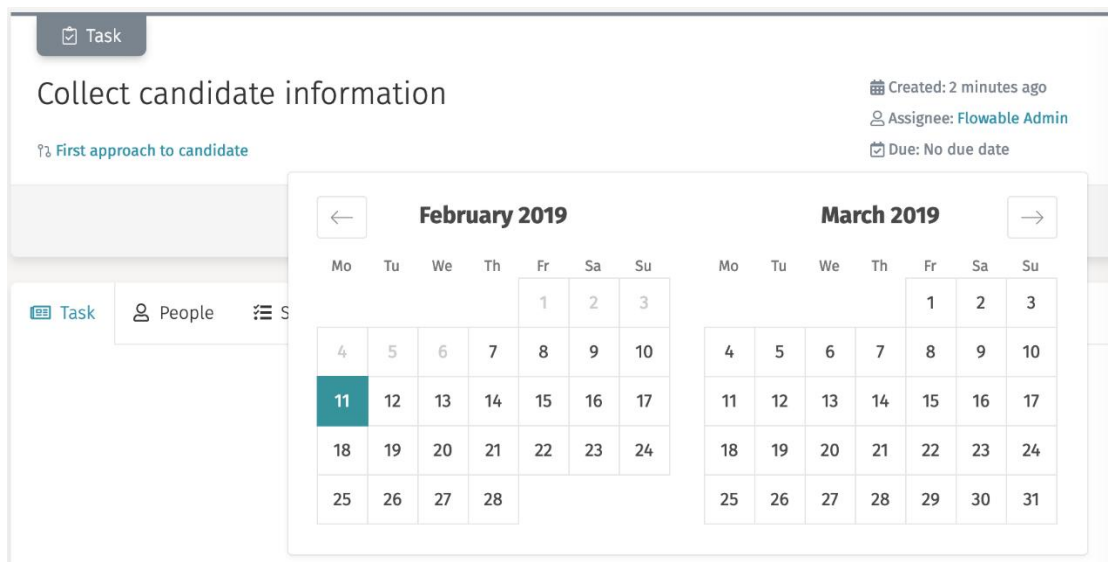
Due date

The Due date field (shown as **Due**) in the header displays the due date of the task. This is an additional information attribute that you can use to specify when a task should be completed.

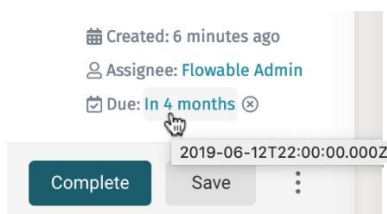
If no due date is set, *No due date* is shown.

Created: 2 minutes ago
Assignee: Flowable Admin
Due: No due date

Once you click on the due date value, a date picker appears and you can select the day you want to set as the due date.



By selecting a day in the calendar the due date is set. The due date can be modified at any time by clicking again on the field. If you place your mouse on top of the due date, the actual date is shown, and a **X** button appears that lets you remove the due date completely.



NOTE

This attribute is just informative. Tasks are available for completion even past the specified due date.

Outcomes

By default, the outcome buttons of a task are **Complete** and **Save**.

- The `Complete` button saves the form and completes the task, making the work item continue to the next step.
- The `Save` button saves the form, but does not complete the task, thus the task remains opened to be completed on a next step.

If a task has custom **outcome** buttons, those buttons also complete the task, but add a variable to the process that signals which option was selected. For example, Accept or Reject a loan request. This outcome variable can then be read in the process in order to use it in a conditional flow to model which is the next step that should happen in the process.

The screenshot displays a 'Loan review' task interface. At the top, there's a header bar with a 'Task' tab. Below it, the task title 'Loan review' is shown, along with a breadcrumb 'Loan Application'. On the right, meta-information includes 'Created: less than a minute ago', 'Assignee: Flowable Admin', and 'Due: No due date'. A row of action buttons ('Accept', 'Reject', 'Escalate', 'Save') and a three-dot menu is positioned below the header. The main form area has a navigation bar with tabs: 'Task' (selected), 'People', 'Subtasks', 'Documents', and 'History'. The form fields are organized into two columns. The left column contains 'Full name' (John Doe), 'Home' (radio buttons for Rented, Mortgaged, Owned; Mortgaged is selected), and 'Requested loan' (5000). The right column contains 'Age' (21), 'Nationality' (UK), and 'Salary' (50000). At the bottom, there's a text area for 'Advice' containing the text 'Young, so need further checks'.

Additional actions

If the task has additional modeled actions, they are displayed when you click on the button represented by the three dots. You can then select which action you want to execute by clicking on it.

Navigation Bar

When you click on a task and the details panel loads its information, a navigation bar is shown on the main area. This bar acts as tabs from where you can perform additional actions on the task.

Task

The task tab is the default tab of the task details view. It shows the corresponding form of the task, so the assignee user can interact with it, fill the appropriate fields, and save or complete the task. This area is scrollable when needed.

The screenshot shows a task details view with the 'Task' tab selected. The form contains the following fields:

- Full name:** Text input with value 'John Doe'.
- Age:** Text input with value '21'.
- Home:** Radio button group with options 'Rented', 'Mortgaged' (selected), and 'Owned'.
- Nationality:** Dropdown menu with value 'UK'.
- Requested loan:** Text input with value '5000'.
- Salary:** Text input with value '50000'.
- Advice:** Text input with value 'Young, so need further checks'.

CAUTION

If the task tab is not selected, you do not see the outcome buttons in the header area to be able to complete the task.

A task form can have mandatory fields. The mandatory fields are marked with a red asterisk (*). A task cannot be completed (the `Complete` button is disabled) until all mandatory fields have been filled in, and a message appears under them asking you to fill them.

The screenshot shows a task details view with the 'Task' tab selected. The form is titled 'Capture details' and includes a link 'Loan Application Advanced'. The form contains the following fields:

- Full name:** Text input with value 'John McManaman'.
- Age *:** Text input (empty). Red error message: 'Field must not be empty'.
- Home *:** Radio button group with options 'Rented' (selected), 'Mortgaged', and 'Owned'.
- Nationality:** Dropdown menu (empty).
- Requested loan *:** Text input (empty). Red error message: 'Field must not be empty'.
- Salary *:** Text input (empty). Red error message: 'Field must not be empty'.

At the top right, there is a header area with the following information:

- Created: about 2 hours ago
- Assignee: Flowable Admin
- Due: No due date

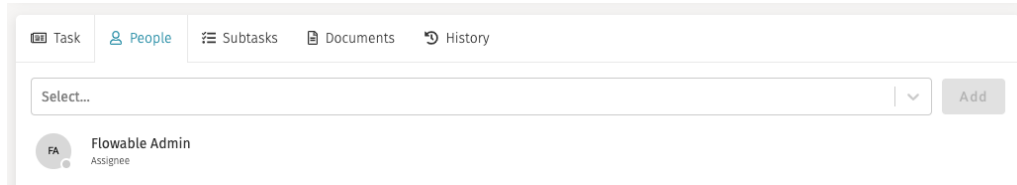
At the bottom right, there are two buttons: 'Complete' (disabled) and 'Save' (active).

NOTE

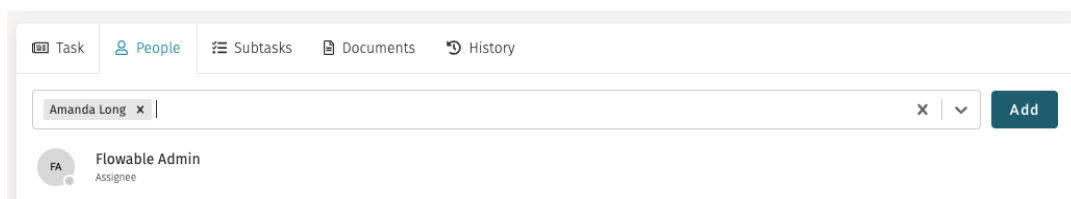
You can always save a form without filling in all mandatory fields.

People

When you are working on a task, you might want to involve other members of your team in it, so they can help you, add additional information or documents. From this tab you can view who is involved in the task.



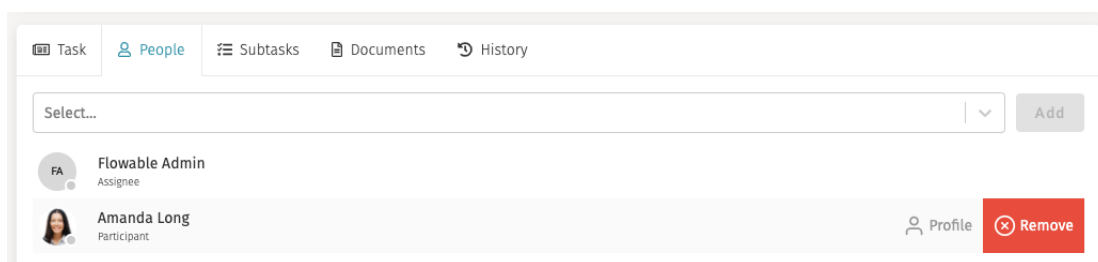
If you want to involve someone in the task, you just have to type his name in the input search combo, select him and click on **Add**. You can add as many people as you want.



NOTE

Every user that you involve in the task are set as a **candidate** for the task, and if they have the appropriate permissions, they can complete the task. The task is listed in their open tasks list.

If you want to remove someone from the task you can place your mouse over its row, and then on the right side a button **Remove** appears.

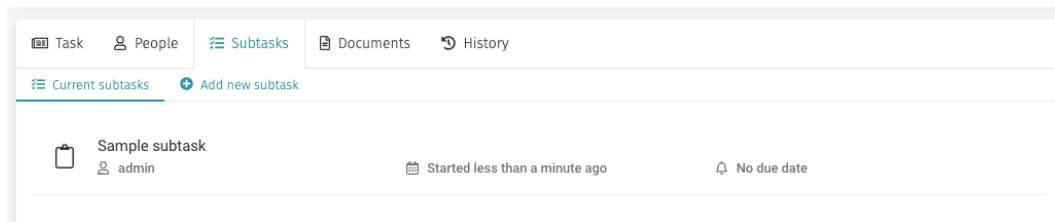


NOTE

You can only add or remove people from open tasks. You cannot modify who is involved after a task has been completed.

Subtasks

Similar to ad hoc tasks, you are able to create new subtasks. When clicking on the subtasks tab, you see the list of subtasks.



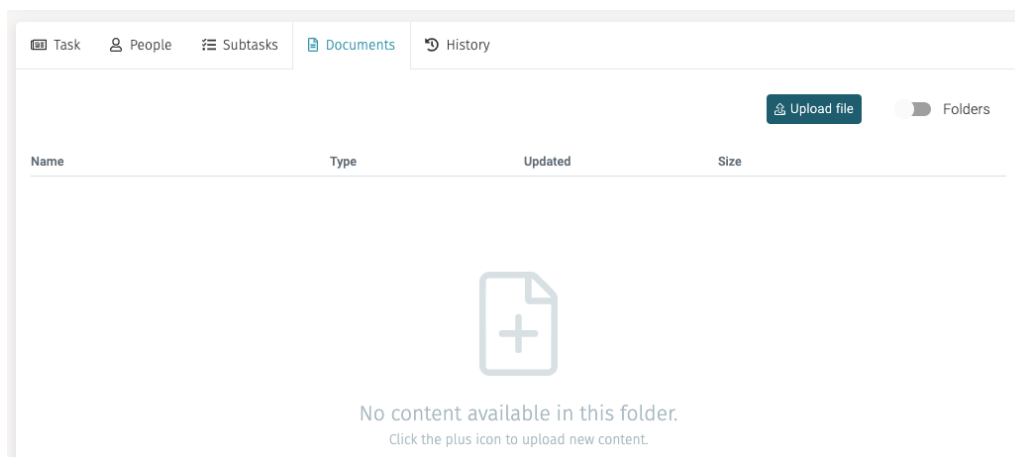
If you want to create a new subtask, you can click on the `Add new subtask` button and a form loads where you can enter the basic information for it (only *Name* is mandatory). After you are done filling the form in, click on `Create subtask`.

TIP

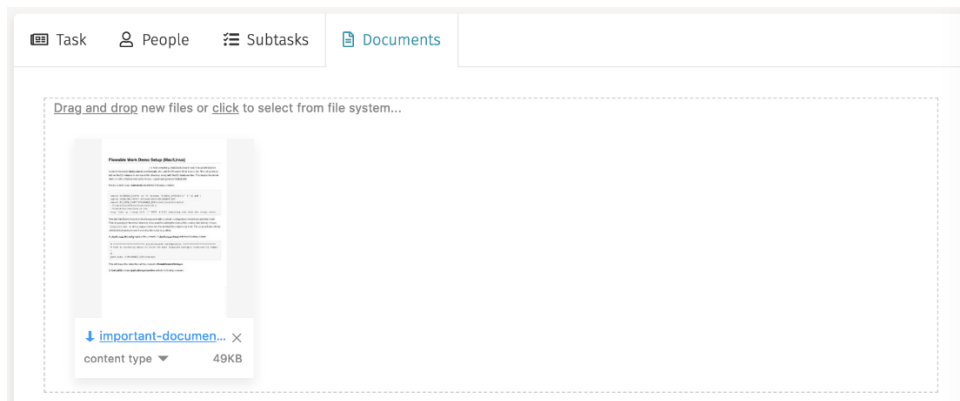
The description field supports a small subset of [Markdown](#). For example, you can use `*My text*` to bold what is between the asterisks: **My text**.

Documents

In the documents tab you can attach files to the task, view already attached files and delete attached files.

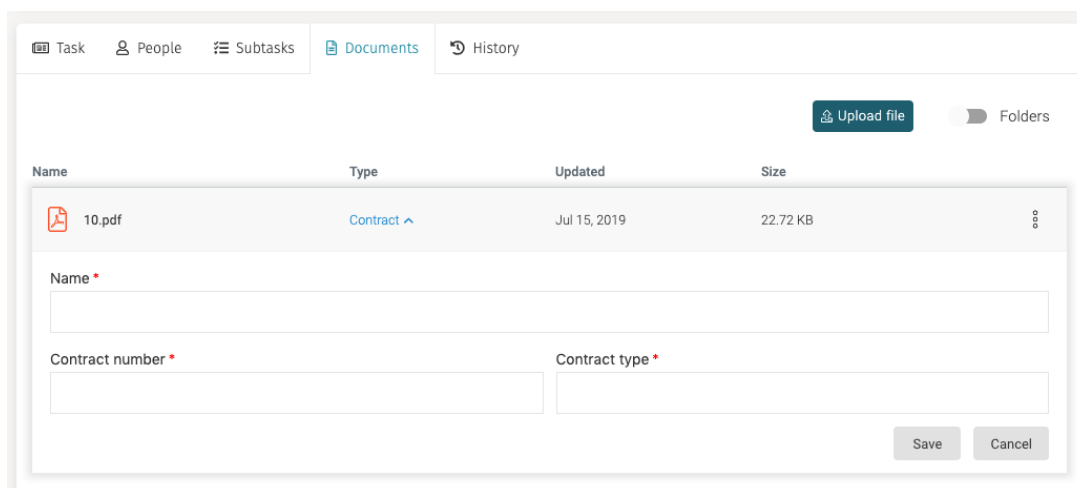


To attach a new file, either click the plus sign in the window or click on the `Upload file` button and a window for choosing the file from your system opens.



To delete a document, simply click the item, click the three dots menu at the right of the line and then select **Delete file**.

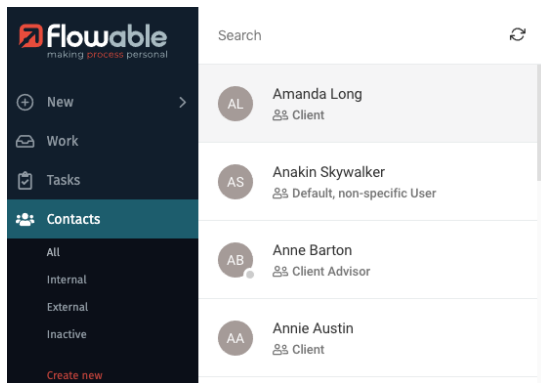
You can add metadata to document by clicking the three dots menu and selecting the **Add content type** item. This opens a panel below where you can enter the content type (for example *Contract*) and based on the selected content additional fields appear. In order to save your metadata, you have to press the **Save** button on the header area.



Contacts

The **Contacts** button gives you access to the list of contacts.

When you click on **Contacts** the inbox loads the list of all your contacts with their respective **roles**.



If there are any visible filters for contacts, they are also shown. For example, the filter *Internal* only shows contacts of your organization, while the filter *external* shows you external clients. The button for creating a new contact is also shown.

Contact Details

The details panel of a selected contact contains all the information about the contact, a navigation bar to choose between contact details and accounts, an `Edit` button (if you have the appropriate permissions to do so), a button for additional actions, and a main area to interact with the selected contact.

Amanda Long

Client test@demo.flowable.io

Additional Actions

Header Area

Outcome Buttons

Edit Deactivate user Add user account

Navigation Bar

Details Accounts

Main Area

Display name *

Amanda Long

Email

test@demo.flowable.io

Firstname *

Amanda

Lastname *

Long

Address

Auerweg 10

Address 2

ZIP

60306

City

Frankfurt

Country

Germany

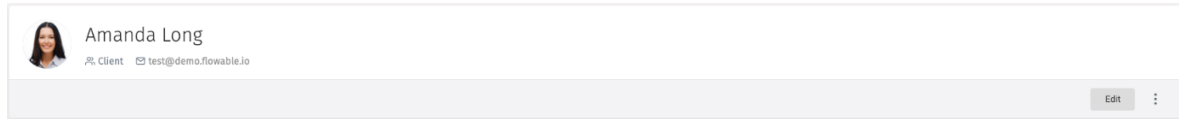
Phone 1

Phone 2

Client Advisor

Header

The header contains the display name of the user, their role, their email, an `Edit` button and additional actions menu dropdown.



TIP

If you click on the email of the contact, you can send him an email using your favorite email software.

Navigation Bar

When you have a contact selected in the inbox and the details panel loads its information, a navigation bar is shown on the main area. This bar provides you access to the details of the contact and their accounts.

Details

The details tab is the default tab of the contact details view. It shows all the main information of the contact: *First name*, *Last name*, *email* as well as additional information that is only shown if the contact has a specific role. For example, a **client** contact has fields for their address, and a selection field to specify the client advisor of the contact.

A screenshot of a contact details form. At the top, there are two tabs: 'Details' (selected) and 'Accounts'. The form contains several input fields: 'Display name' (with a red asterisk) containing 'Amanda Long', 'Email' containing 'test@demo.flowable.io', 'Firstname' (with a red asterisk) containing 'Amanda', and 'Lastname' (with a red asterisk) containing 'Long'. Below these are 'Address' and 'Address 2' fields. Further down are 'ZIP', 'City', and 'Country' fields. At the bottom are 'Phone 1', 'Phone 2', and a 'Client Advisor' dropdown menu.

Accounts

The accounts tab shows the accounts of the contact, if any.

Editing a Contact

While visualizing the details of a contact you can click on the `Edit` button on the header area to make modifications to their information. The details panel then changes to an edit mode

that lets you modify the fields, and the `Edit` button is replaced by a `Save` button and a `Cancel` button. Once you have finished the modifications, you can save them by clicking on `Save`. In case you want to discard the modifications, you can press `Cancel` and any unsaved changes are not applied.

The screenshot shows a user profile form for 'Amanda Long'. At the top, there is a profile picture placeholder, the name 'Amanda Long', and the role 'Client' with the email 'test@demo.flowable.io'. Below this is a toolbar with buttons: 'Save' (dark blue), 'Cancel' (light grey), 'Deactivate user' (light grey with a play icon), 'Add user account' (light grey with a play icon), and a vertical ellipsis menu. The form itself has two tabs: 'Details' (active) and 'Accounts'. The 'Details' tab contains several input fields: 'Display name' (Amanda Long), 'Email' (test@demo.flowable.io), 'Firstname' (Amanda), 'Lastname' (Long), 'Address' (Auerweg 10), 'Address 2' (empty), 'ZIP' (60306), 'City' (Frankfurt), 'Country' (Germany), 'Phone 1' (empty), 'Phone 2' (empty), and a 'Client Advisor' dropdown menu.

If you have created a custom contact form, then define the keys of the forms you want, along with the permissions in the user definition model, as below:

```
{
  "key": "contact",
  "name": "Contact User",
  "description": "Creates a new contact user.",
  "forms":
  { "init": "F01_userInitFormDefault", "view": "F02_userViewFormDefault",
    "edit": "F03_userEditFormDefault" }

  ,
  "actionPermissions":
  { "create": [ "flowableAdministrator" ], "edit": [ "flowableAdministrator" ] }
}
]
```

You will also need to ensure that the additional variables from the custom form are explicitly added to the `restVariables` property of the user definition model:

```
"restVariables": {
  "all": [
    "clientAdvisorId", "address", "address2", "zip", "city", "country",
    "phone1", "phone2"
  ]
},
```

If the variables are not here, then they will be ignored and you will not be able to update them.

The following variables are added by default: “email”, “firstName”, “lastName”, “displayName”, “language” and “theme”.

Deactivate User

The `Deactivate user` button provides a way to deactivate a contact and their associated accounts.

Add User Account

Clicking the `Add user account` opens a dialog where various account information can be provided.

Add user account

Add User Account

You can create a new user account by filling out the form below.

Account type *

☐ WhatsApp ☐ WeChat ☐ Facebook Messenger ☐ Line

Please choose the account type you want to create.

External user id

If you already know the external user id (e.g. the phone number for WhatsApp or the user id of WeChat, etc), then you can already put it in here.

External user name

If you already know the external users name, you can put it in here.

Default client conversation *

☐ Client / client advisor conversation ☐ Ticket within existing desk

Submit Cancel

Creating New Contacts

When you click on the **Create new** item in the **Contacts** section, a window appears which lets you select the **profile** (also called technically **user definition**) of the user you want to create. The profile of the contact determines which functions he is able to access and perform.

The 'Create' window has a title bar with a search icon and a close button. Below the title bar is a search bar with the text 'Search'. The main content area is titled 'Select an item below to create' and displays a grid of user profile options, each with a red person icon and a description:

- Administration User**: Creates a new, administration user.
- A bot user**: Creates a new user for a bot.
- Client**: Creates a new user setup as a client.
- Client Advisor**: Creates a new user setup as a client advisor.
- Client Supporter**: Creates a new user setup as a client supporter.
- Compliance Officer**: Creates a new user setup as a compliance officer.
- Default, non-specific User**: Creates a new, non-specific user where the member groups can be freely chosen.
- Client**: Creates a new user setup as an external client.
- Operation Admin**: Creates a new user setup as a operation admin.
- Reporting User**: Creates a new user setup as a reporting user.
- A temporary user**: Creates a new temporary user.

After selecting the profile, the window shows the fields needed for creating the contact. Mandatory fields are marked with a red asterisk (*), and the fields that are shown are determined by the profile that was selected. For example, in order to create an external client you need to select a Client advisor for him. Once you have filled in all mandatory fields, you can press on the **Submit** button. The window closes and your recently created contact is loaded into the details pane.

The 'Create contact' window has a title bar with a close button. The form contains the following fields:

- Display name ***: Text input field with the value 'Pam Beesly'.
- First name ***: Text input field with the value 'Pam'.
- Last name ***: Text input field with the value 'Beesly'.
- Login name ***: Text input field with the value 'pam.beesly'.
- Email ***: Text input field with the value 'pam.beesly@flowable.com'.
- Password ***: Password input field with masked characters '****'.
- Repeat password ***: Password input field with masked characters '****'.

At the bottom right of the form are two buttons: **Submit** and **Cancel**.

Reports

In the **Reports** section you can access several application usage diagrams, to get a quick visual understanding of the execution of your work items and tasks.

When you click on **Reports**, the inbox panel shows you the available items you can get visualizations of.

Case instances

📊 Case instances report

Heat map

📊 Heat map report

Human Tasks

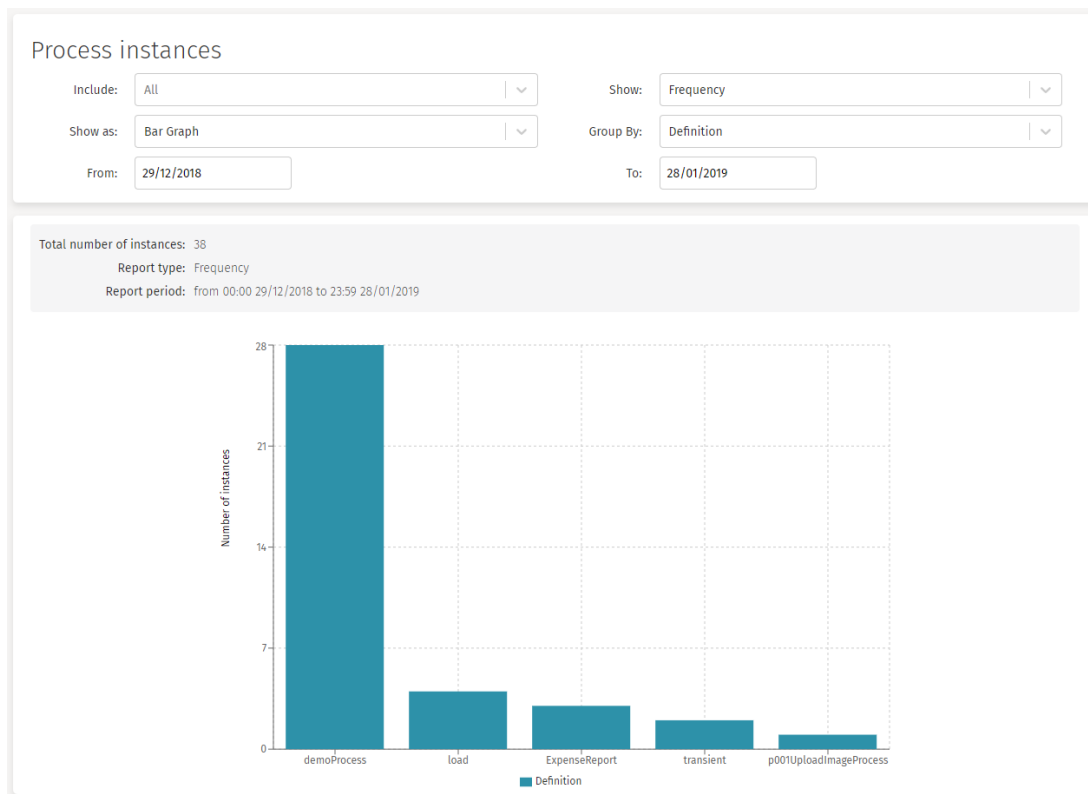
📊 Human Tasks report

Process instances

📊 Process instances report

Process Instances

With this visualization, you can obtain information about your process instances.



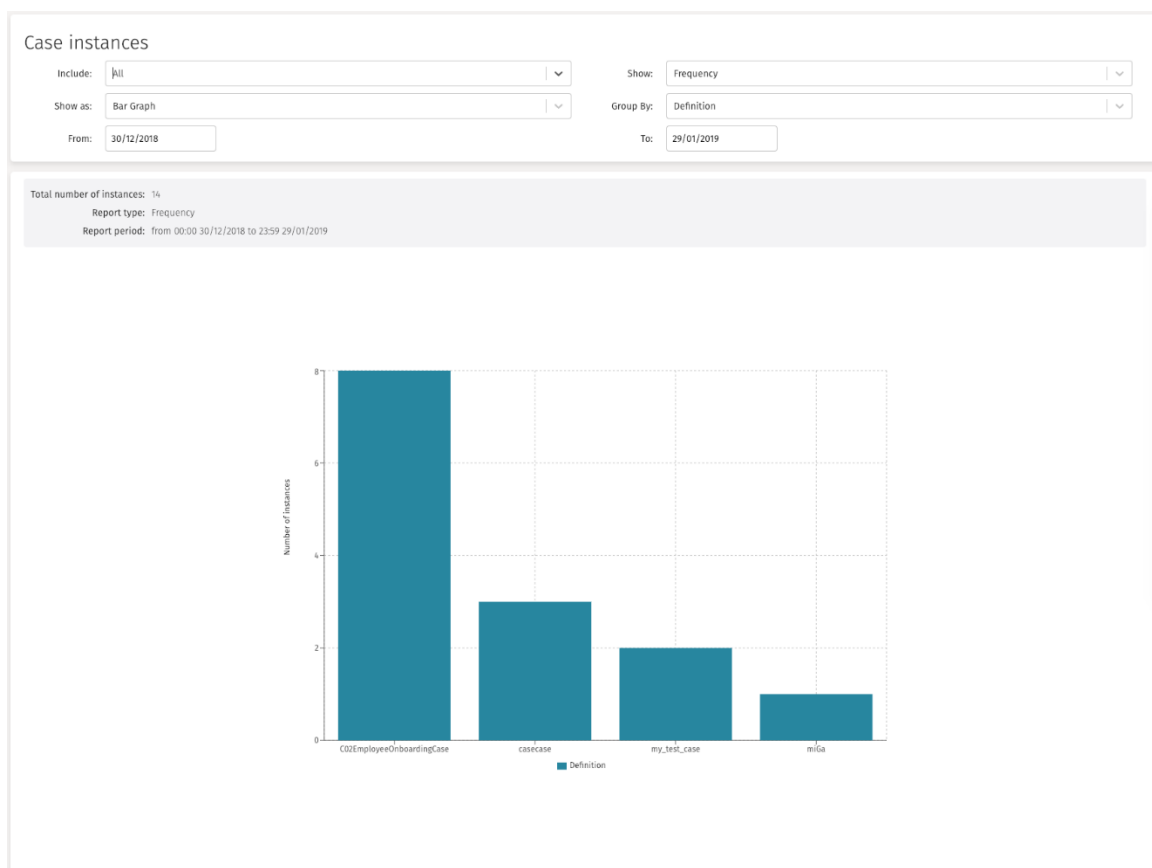
The available options you can use to narrow your diagram are:

- **Include:** This option lets you choose a specific process. By default, all processes are included in the graph. After selecting a process, if you want to go back and show all processes again, you can click the **X** button at the right of the dropdown to deselect the chosen process.
- **Show:** With this option you can choose if you want to see the number of instances created (Frequency) or the execution time (Duration). When you choose the Duration option, the *Calculate* filter appears.
 - **Calculate:** (Show only if Duration is chosen on the Show filter)
 - **Average:** Shows the average execution time of the process instances.

- **Minimum:** Shows the minimum execution time of the process instances.
- **Maximum:** Shows the maximum execution time of the process instances.
- **Total:** Shows the total execution time of the process instances.
- **Show as:** With this option you can choose the type of report to obtain. The available graphs are: *Bar Graph*, *Line Graph* or *Pie Chart*.
- **Group by:** With this option you can group the report values by *Definition*, or by *Hour*, *Month*, *Year*, or *Week*.
- **From - To:** With these two options you can narrow the time range where you want your data to be obtained from.

Case Instances

With this visualization, you can obtain information about your case instances.



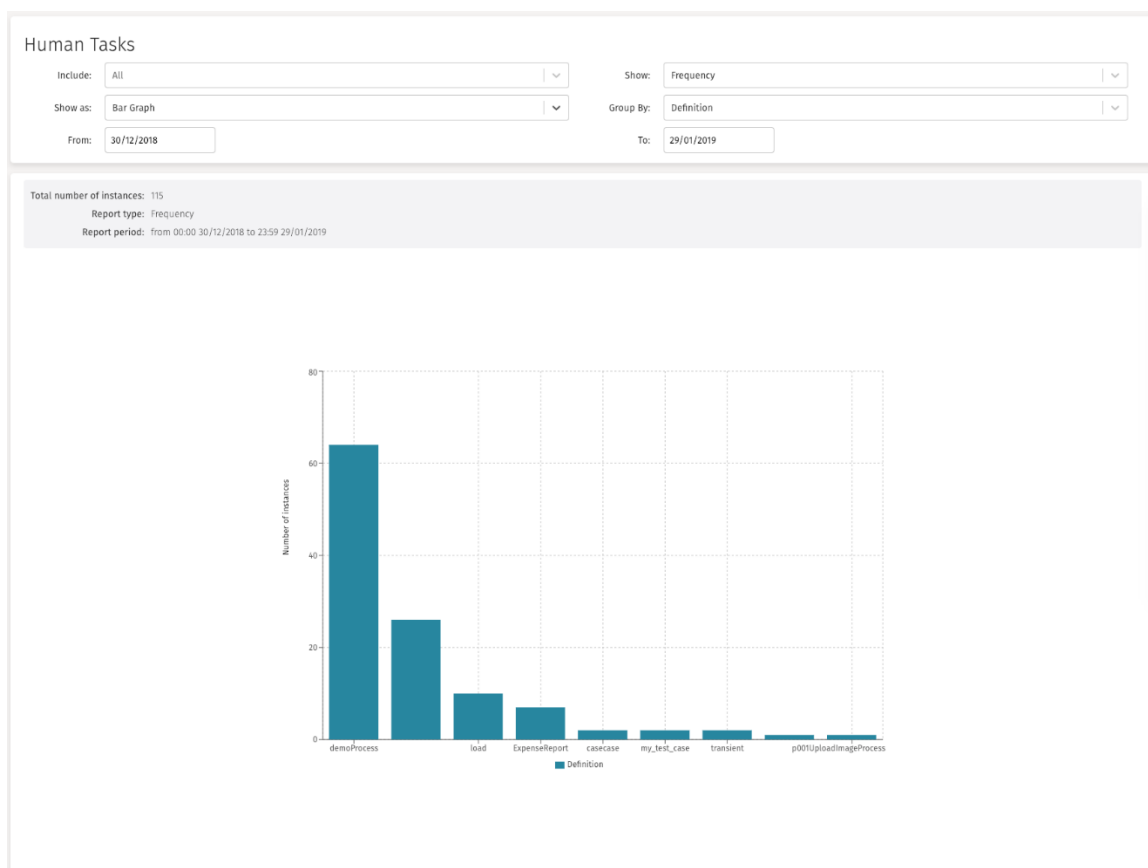
The available options you can use to narrow your diagram are:

- **Include:** This option lets you choose a specific process. By default, all processes are included in the graph. After selecting a process, if you want to go back and show all processes again, you can click the **X** button at the right of the dropdown to deselect the chosen process.
- **Show:** With this option you can choose if you want to see the number of instances created (Frequency) or the execution time (Duration). When you choose the Duration option, the *Calculate* filter appears.
 - **Calculate:** (*Show only if Duration is chosen on the Show filter*)
- **Average:** Shows the average execution time of the process instances.

- **Minimum:** Shows the minimum execution time of the process instances.
- **Maximum:** Shows the maximum execution time of the process instances.
- **Total:** Shows the total execution time of the process instances.
- **Show as:** With this option you can choose the type of report to obtain. The available graphs are: *Bar Graph*, *Line Graph* or *Pie Chart*.
- **Group by:** With this option you can group the report values by *Definition*, or by *Hour*, *Month*, *Year*, or *Week*.
- **From - To:** With these two options you can narrow the time range where you want your data to be obtained from.

Human Tasks

With this visualization, you can obtain information about your human task instances.



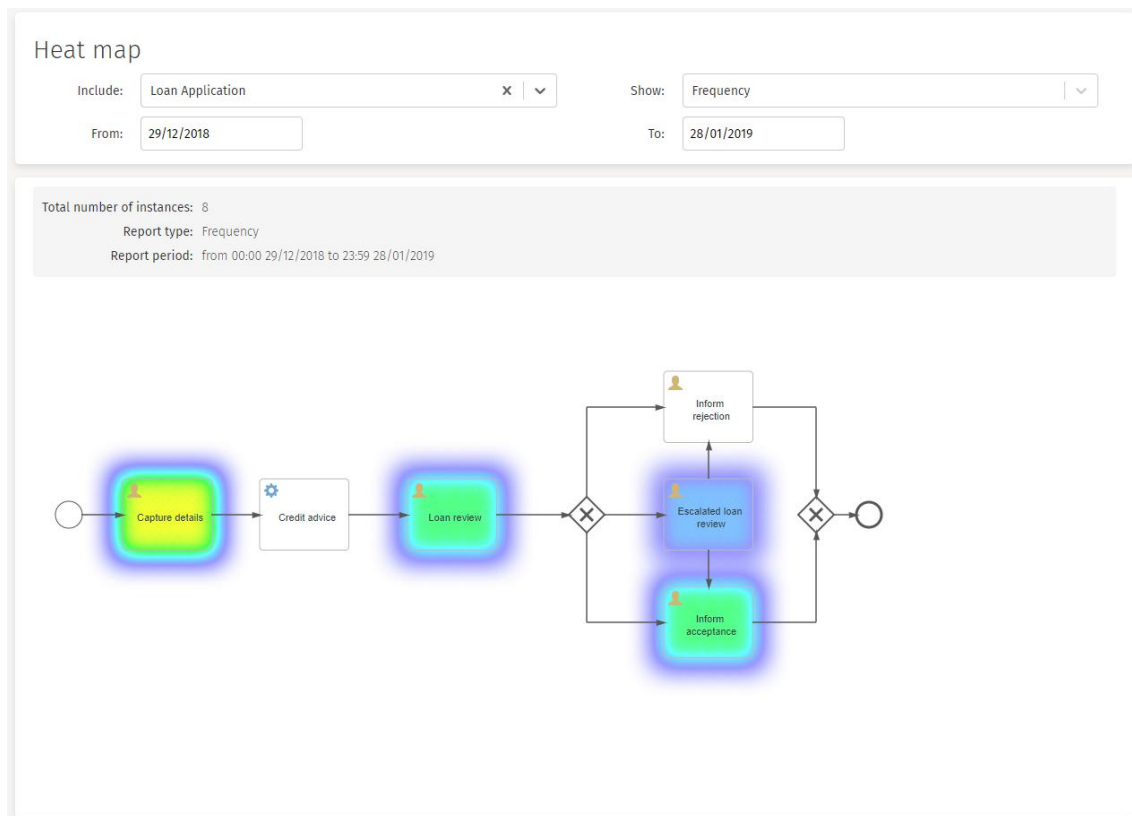
The available options you can use to narrow your diagram are:

- **Include:** This option lets you choose a specific process. By default, all processes are included in the graph. After selecting a process, if you want to go back and show all processes again, you can click the **X** button at the right of the dropdown to deselect the chosen process.
- **Show:** With this option you can choose if you want to see the number of instances created (Frequency) or the execution time (Duration). When you choose the Duration option, the *Calculate* filter appears.
 - **Calculate:** (*Show only if Duration is chosen on the Show filter*)
- **Average:** Shows the average execution time of the process instances.

- **Minimum:** Shows the minimum execution time of the process instances.
- **Maximum:** Shows the maximum execution time of the process instances.
- **Total:** Shows the total execution time of the process instances.
- **Show as:** With this option you can choose the type of report to obtain. The available graphs are: *Bar Graph*, *Line Graph* or *Pie Chart*.
- **Group by:** With this option you can group the report values by *Definition*, or by *Hour*, *Month*, *Year*, or *Week*.
- **From - To:** With these two options you can narrow the time range where you want your data to be obtained from.

Heat Map

This visualization lets you select all process instances of a given definition and show in a process diagram the number of human tasks that are created (frequency) or the amount of time that is spent on each task.



The available options you can use to narrow your diagram are:

- **Include:** This option lets you choose a specific process. By default, all processes are included in the graph. After selecting a process, if you want to go back and show all processes again, you can click the **X** button at the right of the dropdown to deselect the chosen process.
- **Show:** With this option you can choose if you want to see the number of instances created (Frequency) or the execution time (Duration). When you choose the Duration option, the *Calculate* filter appears.
 - **Calculate:** (*Show only if Duration is chosen on the Show filter*)
- **Average:** Shows the average execution time of the process instances.

- **Minimum:** Shows the minimum execution time of the process instances.
- **Maximum:** Shows the maximum execution time of the process instances.
- **Total:** Shows the total execution time of the process instances.
- **From - To:** With these two options you can narrow the time range where you want your data to be obtained from.

Dashboards

NOTE

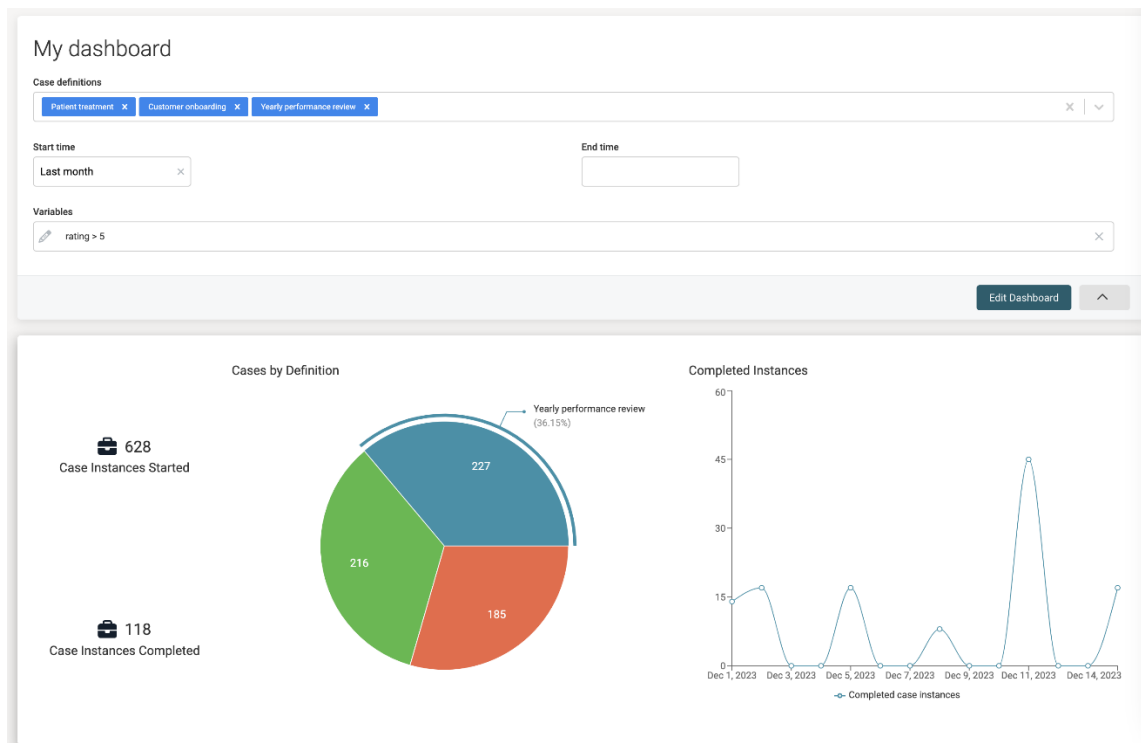
If dashboards aren't visible, they might need to be enabled by an administrator user.

The `Dashboards` option allows a user to create dashboards using a catalog of dashboard components. Flowable Work ships with a set of out-of-the-box components, but custom ones can easily be created using customized query models and dashboard component models.

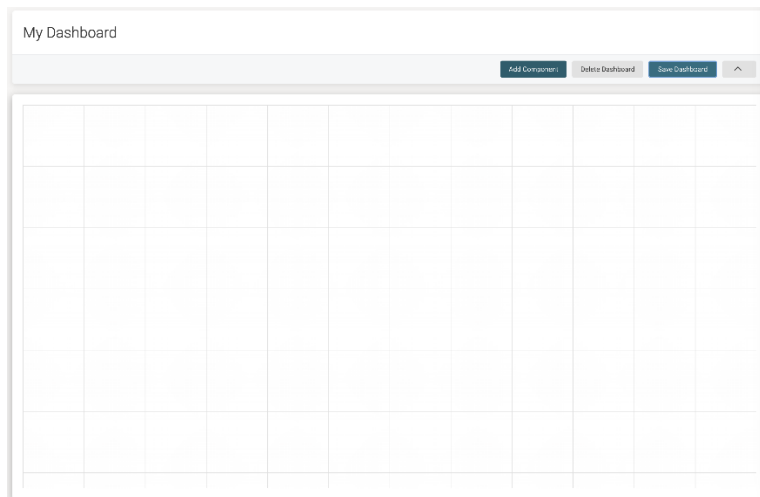
NOTE

Dashboards are user-bound.

The dashboard UI has two high-level UI parts: the **Header with filters** and the **Component Canvas**:

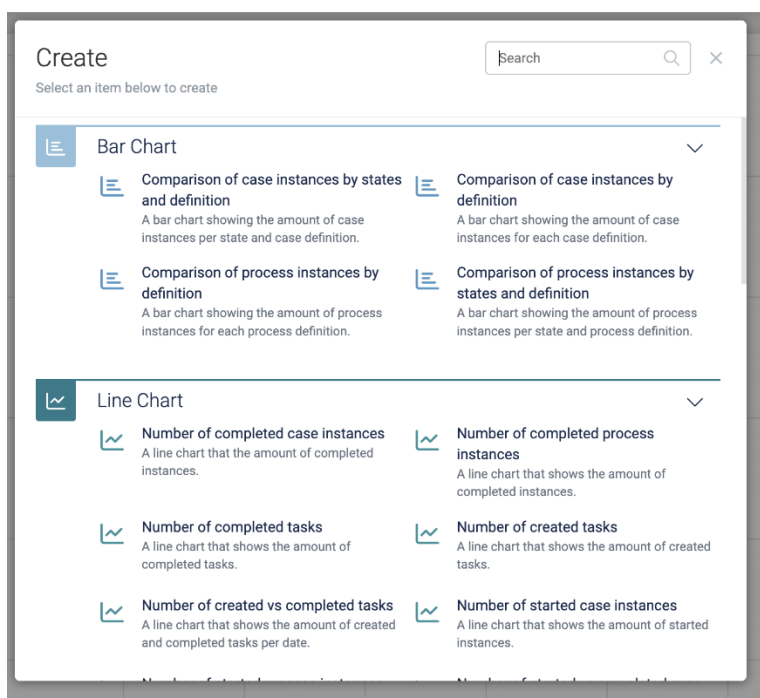


After creating a new dashboard, click the **Edit dashboard** button. Three buttons appear in the header, while the canvas goes into *edit-mode*:



The **Delete dashboard** button allows to delete this particular dashboard and the **Save dashboard** button will save all current changes and switch back to the *view-mode*.

The **Add component** button will show the **Component catalog** which displays all out-of-the-box components and all custom ones published to this system:



After choosing a component, a custom title and component-specific settings can be configured.

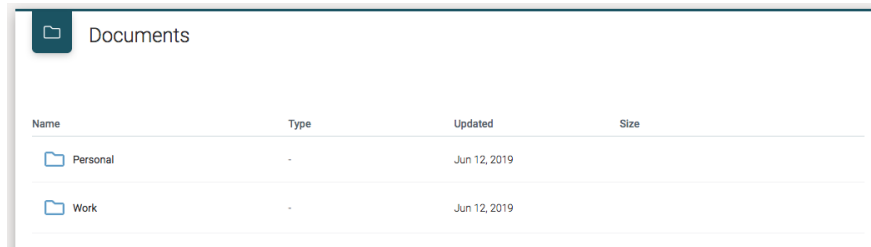
NOTE



When multiple dashboard components reuse the same filter (for example the process definition picker), only **one entry** is rendered in the header. When the filter is changed, all components that use it will re-fetch the data and re-render.

Documents

The `Documents` option gives you access to the documents in your content library.

When you click on **Documents**, the content library appears showing the first level of folders: **Work** and **Personal**.



Name	Type	Updated	Size
 Personal	-	Jun 12, 2019	
 Work	-	Jun 12, 2019	

Those two folders are special system folders that cannot be modified.

- **Work** includes all the documents related to the Work application, which includes cases, processes, and tasks documents.
- **Personal** is a special folder only for the current user. It provides a personal space to organize your documents.

Clicking on the folder name or double-clicking on a folder row opens the folder and displays the current content.

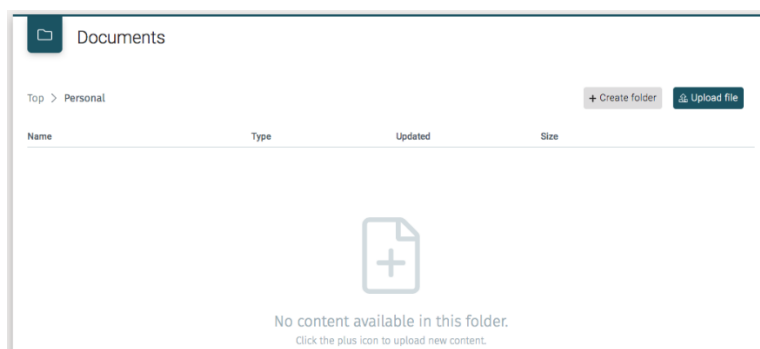
Work Folder Hierarchy

Folders hierarchy is inherited from the Work item definition. So adding a file called `sample.doc` in a task of a case creates the following folder structure:

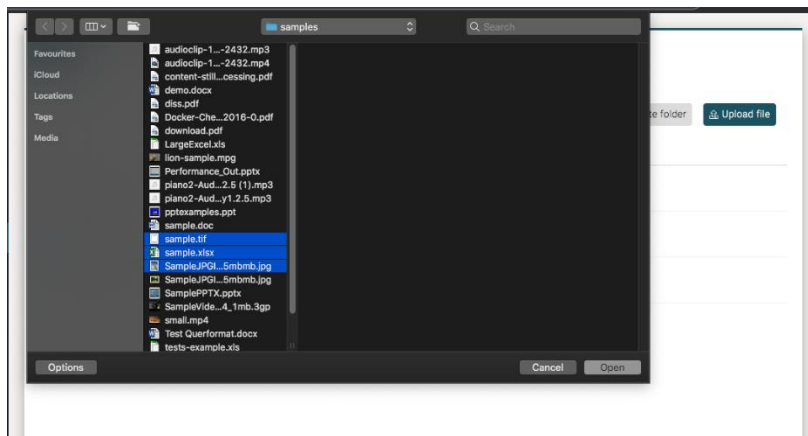
- Case 1
 - Task 1
 - File

Document Upload

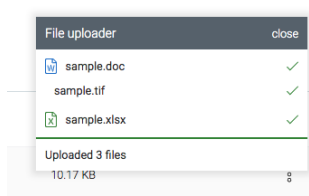
If a user has permission to upload files or create folders in the current folder, then the `Create folder` and `Upload file` buttons appear on the right of the screen.



Clicking on the `Upload file` button opens the system file selector. Alternatively, if the folder is empty, we can also upload files clicking on the big file icon in the middle of the screen.

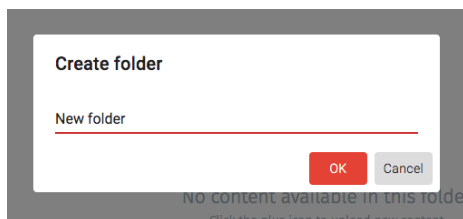


The uploading process allows for uploading multiple files at the same time. An upload status panel shows the upload process and the final result of the operation.



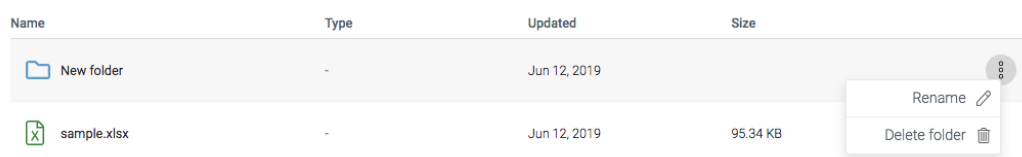
Folders

As with uploading files if we are in a folder that allows us to create folders, we can use the `Create folder` button. A modal window appears in which a new folder name is entered.



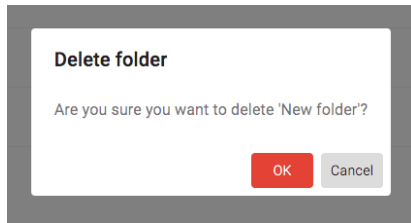
After clicking the `OK` button the new folder appears as a child of the current folder.

To rename a folder, select `Rename` in the context menu at the top right of the item row.



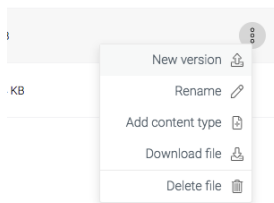
Selecting `Rename` opens a model window in which we set the new folder name. After clicking the `OK` button, the screen is refreshed displaying the new folder name.

To delete folders (again assuming we have permissions), use the same context menu and select the `Delete folder` item. Selecting `Delete folder` opens a confirmation window in which if we click the `OK` button, the folder is deleted.

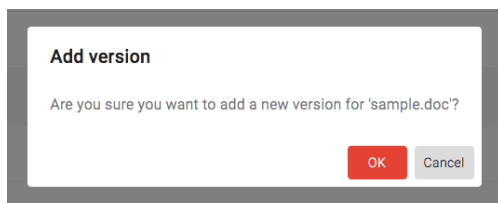


Document Versioning

We can add different versions of the same document by selecting `New version` in the context menu associated with a file.



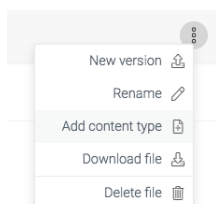
Selecting `New version` opens a model dialog confirming that in fact, we do want to upload a new version of the document. Clicking the `OK` button then opens the system file upload dialog in which we select the file to upload. At any time in the process we can cancel the versioning action.



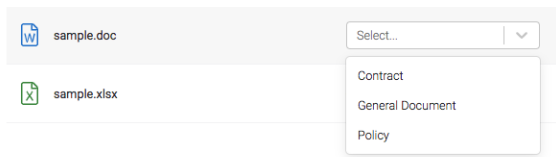
To see the full list of document versions, we first must open the document in preview mode. Next click the versions icon to see the various versions.

Content Type

We can add content type information to a document using the context action menu and clicking on `Add content type`.



Selecting `Add content type` produces a dropdown menu from which to pick one of the possible content types defined in the system.



Once the content type is selected a form with the corresponding metadata fields appears in the list into which we fill in the required information.

A screenshot of a metadata form for a document. The form is titled 'sample.doc' and has a 'Policy' dropdown menu. Below the title, there are three input fields: 'Name', 'Policy type', and 'Policy number'. The 'Policy type' field is currently set to 'Policy'. At the bottom right of the form, there are two buttons: 'Save' and 'Cancel'.

Once the information is entered, click on the `Save` button and if the save is successful, a success message appears:

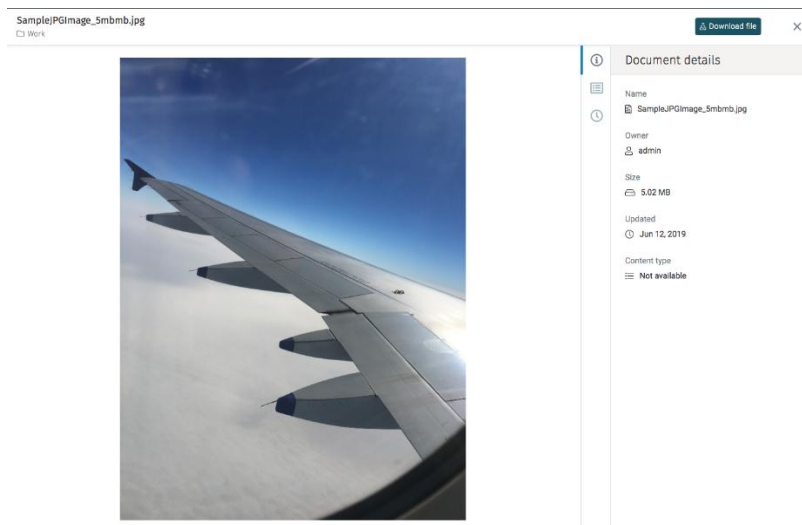
To view the metadata associated with a document metadata open the document in [preview mode](#).

Document Preview

Clicking on the name of a document in the document list shows a preview of the document contents:

A screenshot of a document preview interface. The main content area displays a document with various text styles, including headings, bold, italic, and a bulleted list. The right sidebar shows 'Document versions' with two versions: 'Version 2 (Current)' and 'Version 1'. The 'Version 2 (Current)' version is highlighted. The document content includes a heading 'This is Heading 1 Text', a paragraph of normal text, a bold italicized heading 'This is a Defined Block Style Called BlockStyleTest', a paragraph of normal text, a bold italicized heading 'This is Heading 2 text', a paragraph of normal text, a bulleted list, and a numbered list.

If the document has a convertible file format then a preview in PDF format or the image itself is shown:



The right panel contains additional details about the document, including the filename, size, and owner.

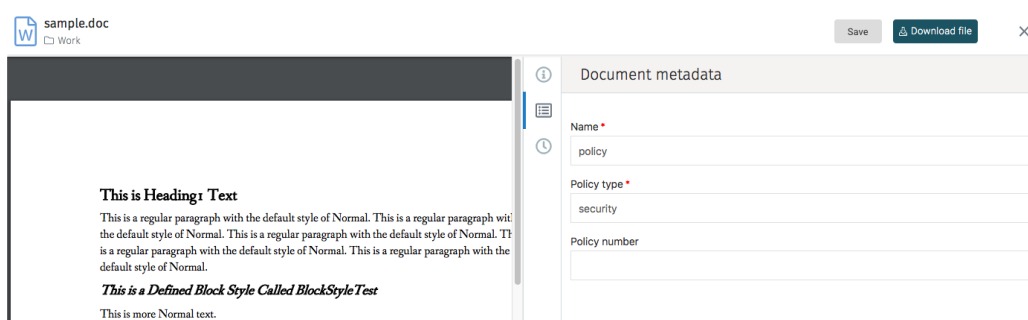
Actions

The current document is downloaded using the `Download file` button on the top right.

Navigation is accomplished by either clicking on the folder name on the top left (breadcrumbs) above the list of files or when previewing a document by clicking on the "X" at the top right corner.



Document Metadata

In preview mode, one of the details tabs is the document metadata. That tab shows the content type and related information defined for that particular document.



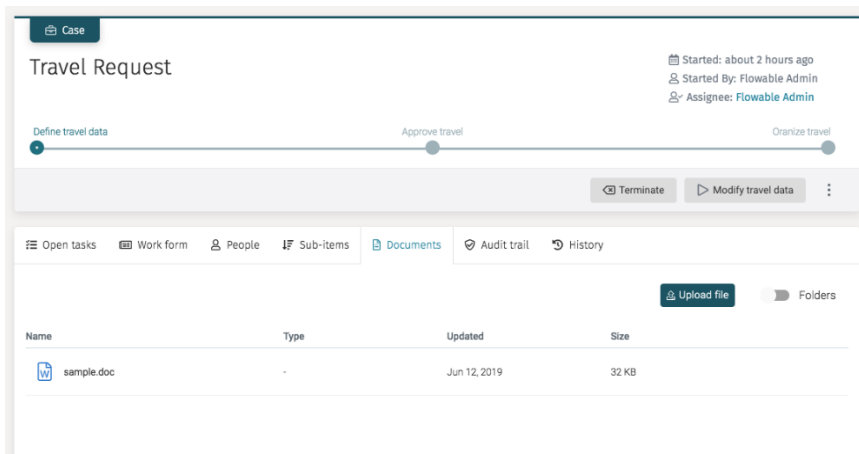
Document Versions


The versions tab lists all the previous versions of the current document. By selecting a previous version from the list that specific version is available for download.

Document versions	
	Version 2 (Current) sample.doc Jun 12, 2019 admin
	Version 1 sample.doc Jun 12, 2019 admin

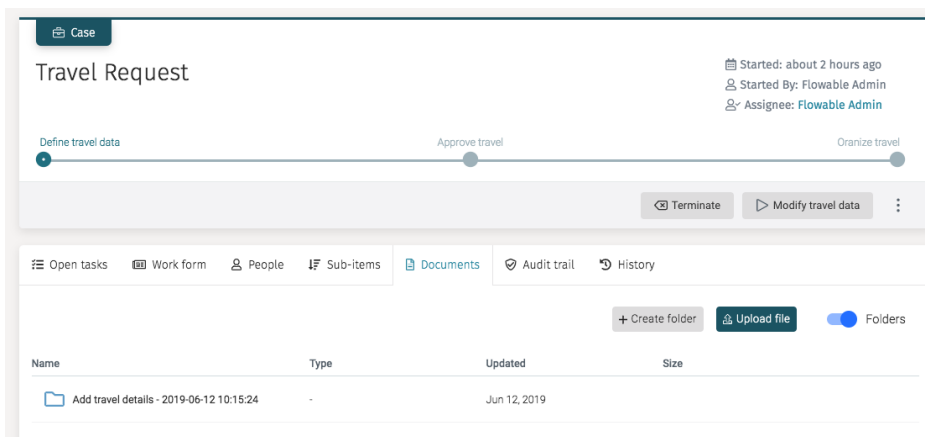
Documents Tab


For each of the Work details pages, there is a tab that shows the documents associated with that particular case, process, or task.



Name	Type	Updated	Size
 sample.doc	-	Jun 12, 2019	32 KB

The documents tab includes a switch control labeled **Folders** that is used to control whether or not to show the hierarchy of folders. By default the folder hierarchy is disabled; thus all the files associated with that work item are shown in a flat list as shown above. If the **Folders** switch control is enabled, the view shows folders under that case folder. As seen in the next example, we see the task folder where contains the `sample.doc` file.



Name	Type	Updated	Size
 Add travel details - 2019-06-12 10:15:24	-	Jun 12, 2019	

In either view, we can [upload files](#) directly to the work item folder, and if the **Folders** switch is active we can [create folders](#) too.