User Action

Last Modified on 15/04/2019 2:52 pm AEST

Purpose

Displays a form to the user and creates a user task. Also presents buttons at the top of the form for the user to progress the workflow. For example, a 'User Action' activity can be used to provide a manager with the ability to Approve or Reject an expense.

Behaviour

When a 'User Action' activity is used, it creates an 'Approval Task' for the specified person. This is a special type of task that links to another record. This task will be seen in any 'Task Report' accessible by the user, when the user opens the task, they will be presented with a form (as specified in the activity configuration). The user is also presented with buttons at the top of the form (corresponding to the specified user responses in the activity configuration). When the user selects one of the buttons, it will progress the workflow.

Properties

Setting	Description
For Person	The person who this action intended for
Record	The record that will be presented to the person
Form	The form that will be presented to the person
Priority	The priority of the task that is created
Task name	The title of the task that is created as seen in a task list and user messages. If left blank, the task name will default to the name given on the User Action activity label
Due date/time	The date and time when the user activity is due
Time out	The date and time when the user activity will time-out

Setting	Description
date/time	
Keep completed task history	Enabling this option will keep the completed task in Task report, otherwise completed task is deleted permanently
Wait for next form	If there are multiple user actions in a row (with other activities in the middle), then enabling this option will pause the user's screen until the middle activities are complete, and then take the user to the next user action
Hide comment field	Removes the ability for the responding user to add a comment
Comment mandatory	If enabled, the comment field is made mandatory and buttons are disabled until the user enters commentary.
Open in edit mode	When the form is presented to the user, automatically put the form in edit mode
User Responses	The name of the buttons presented to the user. Defaulted to 'Approve' and 'Reject', however these defaults can be changed. The 'action summary' is text that can be added to the history log if the corresponding user response is selected

Parameters created

Parameter	Type	Description
[Activity Name].completed by	Person	The person who completed the task
[Activity Name].completed task	Record	The task created by the user action activity

Auditing on User Actions

Every time a user interacts with a user action activity, such as a click of the button, a record is saved to the audit log to track each time the workflow pauses. To view the Audit log on a record, see either Record Audit Log or Contextual Audit Log .

Auditing on on User Action is a workflow setting rather than an activity setting, enabling the setting will automatically audit all User Action activities for a given workflow.

To enable the audit:

1. Open the **Workflow**
2. Select Workflow **Properties** and tick **Enable audit for user action** option.

The format of the User Action Audit log is described below:

	Format	Example
Name Field:	()()	Admin(john.smith)(jane.lowe) Updated 'Task 1'
Description Field	Assigned to: , Due: , Actioned By: , Completed: , Action:	Assigned to: John Smith, Due: 30/05/2017 3:35:42 AM, Actioned By: Jane Lowe, Completed: 30/05/2017 3:36:45 AM, Action: Approve