Create and manage scheduled tasks

Executing work with tasks and cases · https://gluu.biz/documentation/executing-tasks-cases/create-manage-scheduled-tasks/

●●●Advanced

Process owner

Business user

Goal: Set up a task that Gluu creates automatically on a fixed schedule, then manage that schedule over time.

A scheduled task is a recurring task template. On the schedule you set, for example every weekday at 08:00, Gluu creates a new task for routine work such as checks, reviews and meetings. Each occurrence is a separate task that someone has to complete.

Scheduled tasks are not connected to cases. For tasks that start on demand inside a case, see Run processes as cases.

KEY TAKEAWAYS

- A scheduled task creates a new task on a fixed schedule. Each occurrence has to be completed or closed on its own.
- There are two kinds: an activity task, carried out by the activity's role, and a process review task, which belongs to the whole process and goes to the process owner and process editors.
- The deadline is the start time plus the duration. After it, the occurrence shows **Task overdue**.
- Occurrences missed in the last 10 days, for example during downtime, are created afterwards.
- An activity task is not stored until you save the process.

Before you start

- **Plan:** Scheduled tasks are available on the Advanced plan and on older (legacy) plans. They are not available on Core or Essential. Process review tasks additionally require the Versioning add-on.

- **Role:** You need edit rights on the process to create or edit a schedule. Members of the activity's role complete activity task occurrences. Process review tasks go to the process owner and process editors.
- **Setup:** For an activity task, you need a process with the activity you want to add the task to.

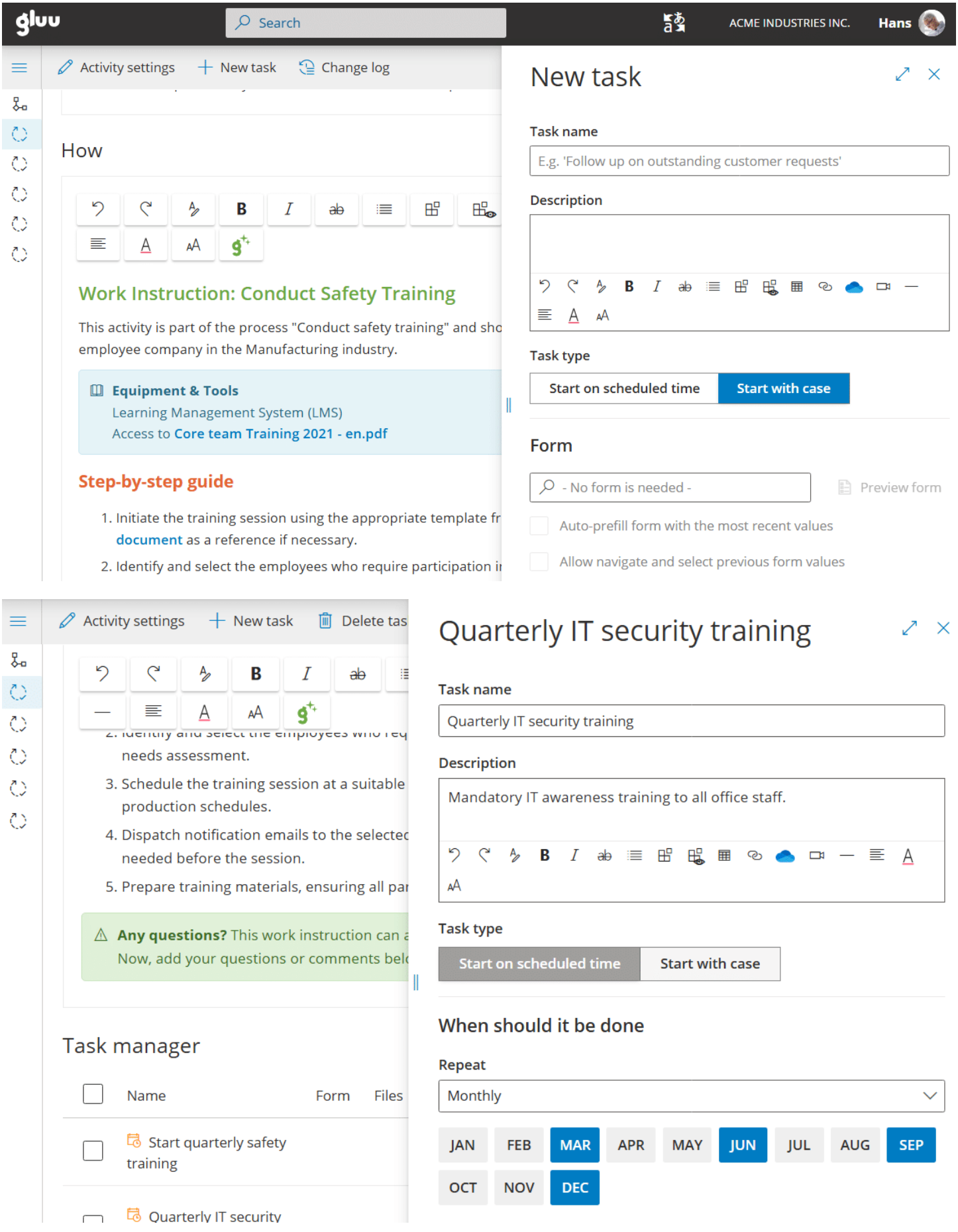
Choose between an activity task and a process review task

Gluu has two kinds of scheduled task. They use the same settings but belong to different places in the process.

	Activity task	**Process review task**
Belongs to	One activity	The whole process, for example "Review process monthly"
Who receives it	Members of the activity's role, not a named person	The process owner and process editors, in **My tasks** and by email
Plan	Advanced	Advanced and the Versioning add-on
Created from	The activity, in **Edit mode**	The **Tasks** tab of the process
Stored when	You save the process	You click **Save changes**
Scheduler switch	Yes, you can pause and resume	No

Create a scheduled task on an activity

1. Open the process and turn on **Edit mode**.
2. Select the activity.
3. Click **New task**.
4. Set **Task type** to **Start on scheduled time**. The panel opens with **Start with case** selected.
5. Fill in the form. See Scheduled task settings for each field.
6. Close the panel.
7. Turn off **Edit mode**, then click **Save & Exit**.


gluu
Search
ACME INDUSTRIES INC.
Hans
Activity settings
New task
Change log
How
Work Instruction: Conduct Safety Training
This activity is part of the process "Conduct safety training" and sho
employee company in the Manufacturing industry.
Equipment & Tools
Learning Management System (LMS)
Access to Core team Training 2021 - en.pdf
Step-by-step guide
1. Initiate the training session using the appropriate template fr
document as a reference if necessary.
2. Identify and select the employees who require participation i
New task
Task name
E.g. 'Follow up on outstanding customer requests'
Description
Task type
Start on scheduled time
Start with case
Form
- No form is needed -
Preview form
Auto-prefill form with the most recent values
Allow navigate and select previous form values
Activity settings
New task
Delete tas
needs assessment.
3. Schedule the training session at a suitable
production schedules.
4. Dispatch notification emails to the selected
needed before the session.
5. Prepare training materials, ensuring all par
Any questions? This work instruction can a
Now, add your questions or comments belo
Task manager
Name
Form
Files
Start quarterly safety
training
Quarterly IT security
Quarterly IT security training
Task name
Quarterly IT security training
Description
Mandatory IT awareness training to all office staff.
Task type
Start on scheduled time
Start with case
When should it be done
Repeat
Monthly
JAN
FEB
MAR
APR
MAY
JUN
JUL
AUG
SEP
OCT
NOV
DEC

Nothing is stored until you save the process. You're done once you have clicked **Save & Exit** and the schedule appears in the activity's Task manager.

Create a process review task

Process review tasks are created from the **Tasks** menu of the process. In process Edit mode you can only create activity tasks.

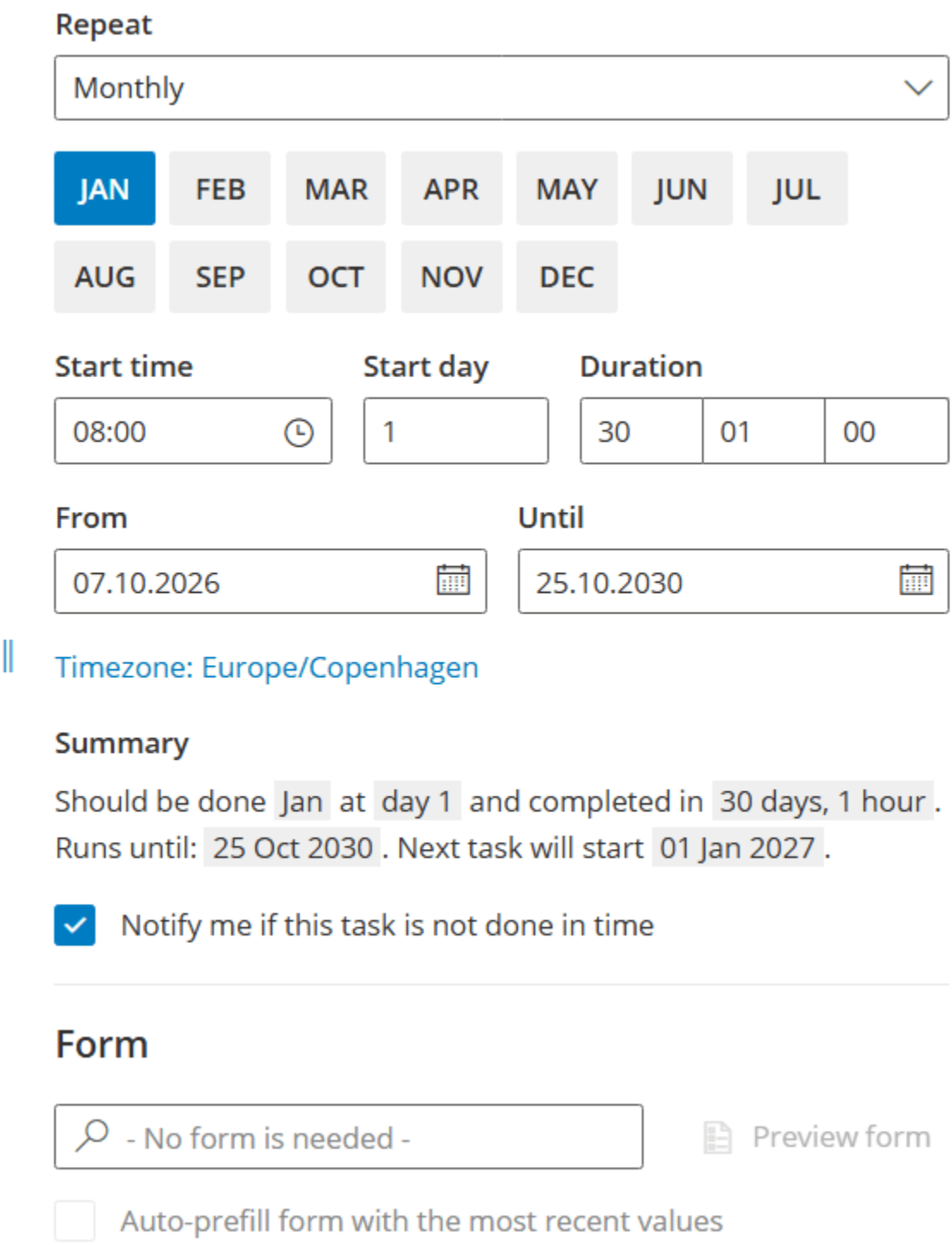
1. Open the process and click **Tasks** in the left menu.
2. Turn on **Edit mode**.
3. Click **Add process review task**.
4. Fill in the form. See Scheduled task settings for each field.
5. Click **Save changes**.

A process review task is saved immediately, so you do not need to save the process afterwards. You're done once the new row appears on the **Tasks** tab.

Scheduled task settings

Setting	What it does
Task name	Required, up to 100 characters.
Description	Rich text shown on every occurrence.
Repeat	Every day, Mon-Fri, Sat-Sun, Selected days or Monthly. Monthly lets you pick the months and a **Start day**.
Start time	The time of day each occurrence starts.
Duration	How many days, hours or minutes the role has to finish. It must be at least 15 minutes and not longer than the gap between two occurrences.
From / Until	The period the schedule runs. **Until** is the only way a schedule ends by itself.
Timezone	Defaults to the account's time zone.
Notify me if this task is not done in time	Includes overdue occurrences in the email digest.

Setting	What it does
Form	An optional form to fill in, with options to prefill it from earlier answers.
Summary	A read-only sentence that describes the schedule. Check it before you save.



The defaults are Mon-Fri at 08:00 with a duration of 1 hour, starting tomorrow and running for 15 days. Extend **Until** if the schedule should run longer.

What happens after you save

- Each occurrence appears a few minutes before its start time.
- The deadline is the start time plus the duration. After the deadline, the occurrence shows **Task overdue**.
- An unfinished occurrence does not stop the next one from being created. Each occurrence has to be closed on its own.
- Occurrences missed in the last 10 days, for example during downtime, are created afterwards. Users may then see several at once.
- Members of the activity's role see activity task occurrences in **My tasks**, the **Calendar** card on Overview, the process **Tasks** tab and the activity.
- Process review task occurrences show in **My tasks** for the process owner and process editors.

Work on a scheduled task occurrence

Open an occurrence from any of the places above. Users can:

- Click **Pick this task** or **Set to 'Open'** to start working on it.
- Click **Submit task** when the work is done.
- Click **Save as draft**, which is only available when a form is attached.
- Click **Close as not applicable** when the occurrence does not apply.
- Click **Restart** or **Unassign**.
- Add comments, files and photos.

You're done once the occurrence is submitted or closed. The next occurrence is created on schedule whether or not this one is finished.

Edit, pause or end a schedule

- **Edit:** Turn on **Edit mode** and click the row on the process **Tasks** tab, or click the task in the activity's Task manager.

- **Pause or resume:** Use the **Scheduler** switch. It is available on activity tasks only. Pausing stops Gluu from creating new occurrences.
- **End:** Set the **Until** date. The schedule then shows **Expired**. You can also delete the schedule.

Notifications for scheduled tasks

- **Email digest:** Includes overdue occurrences for role members who have email notifications on (hourly, daily or weekly), and only when the schedule has **Notify me if this task is not done in time** ticked.
- **Process review tasks:** The process owner and process editors are notified by email.
- **Microsoft Teams:** Gluu posts "started" and "completed" cards when a Teams connector is set up for the role.

Limitations of scheduled tasks

- You cannot subscribe to scheduled tasks in an Outlook or Google calendar.
- The repeat options are daily, weekdays, weekends, selected days and monthly. There is no separate yearly or one-time repeat option.
- A scheduled task goes to the activity's role, or for a process review task to the process owner and process editors. You cannot assign it to a named person. Case tasks can be assigned to named users, see Assign case tasks with case teams and template users.
- Gluu does not send an in-app notification for overdue occurrences. Overdue occurrences show **Task overdue** and can appear in the email digest.
- Scheduled tasks are not connected to cases.

Example: a weekday check and a monthly review

A weekday opening check. A shop has the process "Open the store" with the activity "Check the cash desk", carried out by the role Shift lead. On the activity, you add a task named "Check the cash desk float" and set **Task type** to **Start on scheduled time**. You keep the defaults of Mon-Fri at 08:00 with a duration of 1 hour, and tick **Notify me if this task is not done in time**.

A few minutes before 08:00 each weekday, an occurrence appears in **My tasks** for every member of the Shift lead role. The deadline is 09:00. After that the occurrence shows **Task overdue**, and it

appears in the email digest of role members who have email notifications on. If Gluu is down for two days, the missed occurrences are created afterwards.

A monthly process review. On the **Tasks** tab of the process, you click **Add process review task** and name it "Review process monthly". You set **Repeat** to **Monthly**, pick the months, set **Start day** to 1 and **Duration** to 5 days. A duration of 5 days is shorter than the gap between two monthly occurrences, so the form accepts it. In each selected month, the process owner and process editors see the occurrence in **My tasks**.

Read more: Tasks in Gluu: types and where to create them, Use tasks and forms in daily work, Create and manage forms and Run processes as cases.

FAQ - Scheduled tasks in Gluu

What plan do I need for scheduled tasks in Gluu?
Scheduled tasks are available on the Advanced plan and on older (legacy) plans, not on Core or Essential. Process review tasks additionally require the Versioning add-on. To create or edit a schedule, you also need edit rights on the process the task belongs to.

Who receives a scheduled task in Gluu?
An activity task goes to the role assigned to the activity, so every member of that role sees each occurrence. A process review task goes to the process owner and process editors, who see it in My tasks and are notified by email. You cannot assign a scheduled task to a named person.

What happens when a scheduled task is not done in time?
The deadline is the start time plus the duration. After the deadline the occurrence shows Task overdue. Gluu still creates the next occurrence on schedule, so each one has to be closed on its own. Overdue occurrences appear in the email digest only if Notify me is ticked.

What happens to scheduled tasks missed during downtime?
Gluu creates occurrences that were missed in the last 10 days, for example during downtime, after the system is back. Users may therefore see several occurrences of the same scheduled task at once. Each of these occurrences is a separate task and has to be completed or closed on its own.

How do I pause or end a scheduled task?
To pause an activity task, use the Scheduler switch. To end a schedule, set the Until date, after which the schedule shows Expired, or delete the schedule. Until is the only way a schedule ends by itself.

Process review tasks cannot be paused with the switch.

Can I add scheduled tasks to my Outlook or Google calendar?

No. Gluu does not support calendar subscriptions in Outlook or Google Calendar. Role members see scheduled task occurrences in My tasks, the Calendar card on Overview, the process Tasks tab and the activity. Gluu can also post started and completed cards to Microsoft Teams when a connector is set up.