Create multi-user case tasks

Executing work with tasks and cases · https://gluu.biz/documentation/executing-tasks-cases/create-multi-user-case-tasks/

●●●Advanced

HR Manager

Process owner

Goal: Make every assigned user complete their own copy of a case task, such as a training quiz, and track who has finished.

A multi-user task is a case task that each assigned user completes individually. A normal case task is done once for the whole role. With a multi-user task, every user in the role, or every named user, gets their own copy when the case starts. Use it for trainings, quizzes, sign-offs and acknowledgements.

Before you start

- **Plan:** Multi-user tasks require the Advanced plan and the HR Manager add-on.
- **Role:** You need edit rights on the process to change its tasks and case templates.
- **Setup:** The process has a case template. See Run processes as cases.

Make a case task a multi-user task

1. Open the process, select the activity and turn on **Edit mode**.
2. Click an existing case task, or click **New task** and set **Task type** to **Start with case**.
3. Tick **Create task for each user**.
4. Close the panel, turn off **Edit mode** and save the process.

You're done once the task is saved with **Create task for each user** ticked.

Choose who gets a copy

Who gets a copy is set in the case team of the case template, not on the task itself.

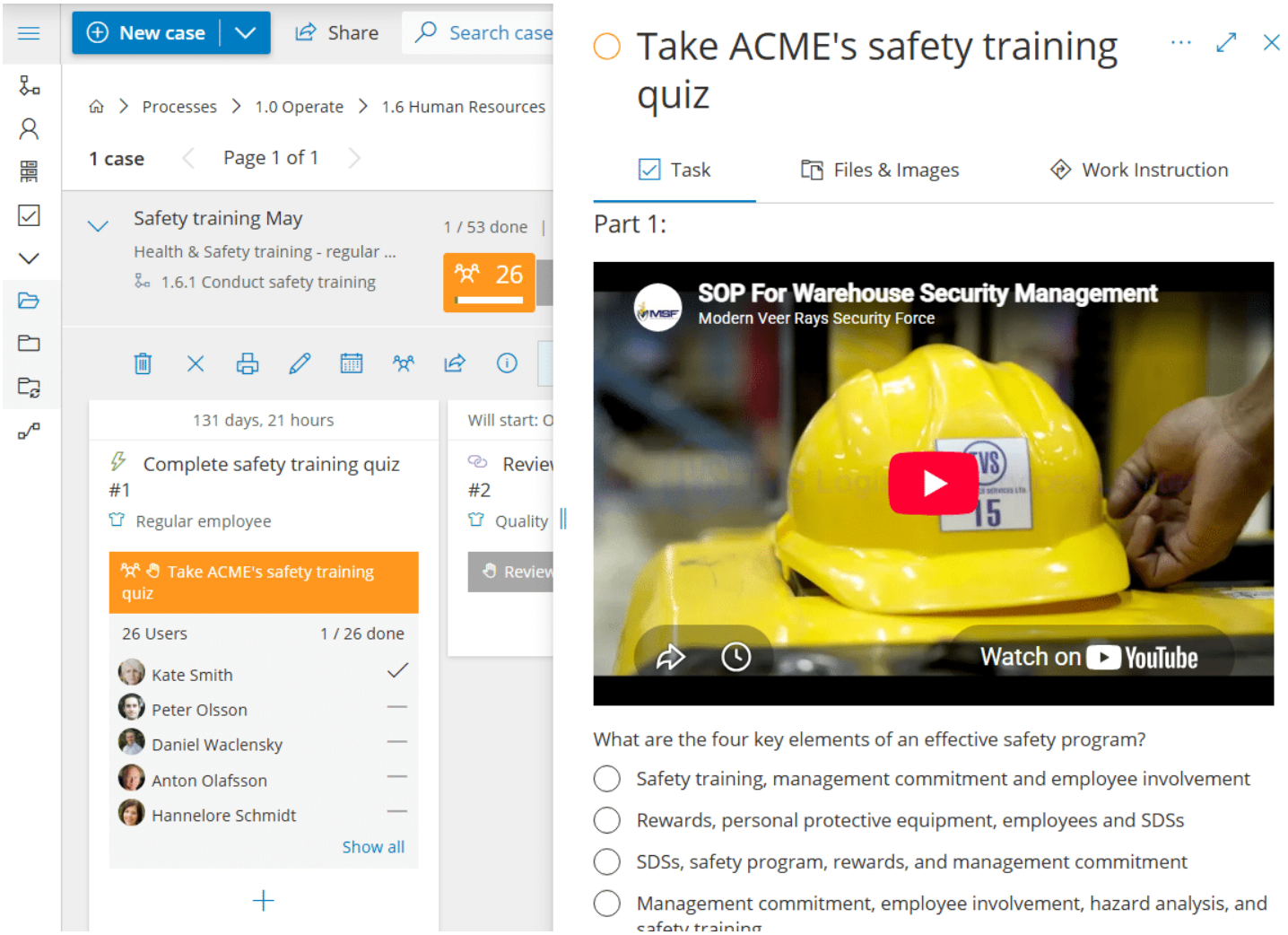
1. Open the process and go to **Cases** > **Case templates**.
2. Open the case template and click **Case team**.
3. For the multi-user task, select a role or specific users. With a role, everyone who has the role gets their own copy.
4. Save the case template.

You can also select external users. External users are added to the case team as external users rather than picked from your user list. Read more in Assign case tasks with case teams and template users.

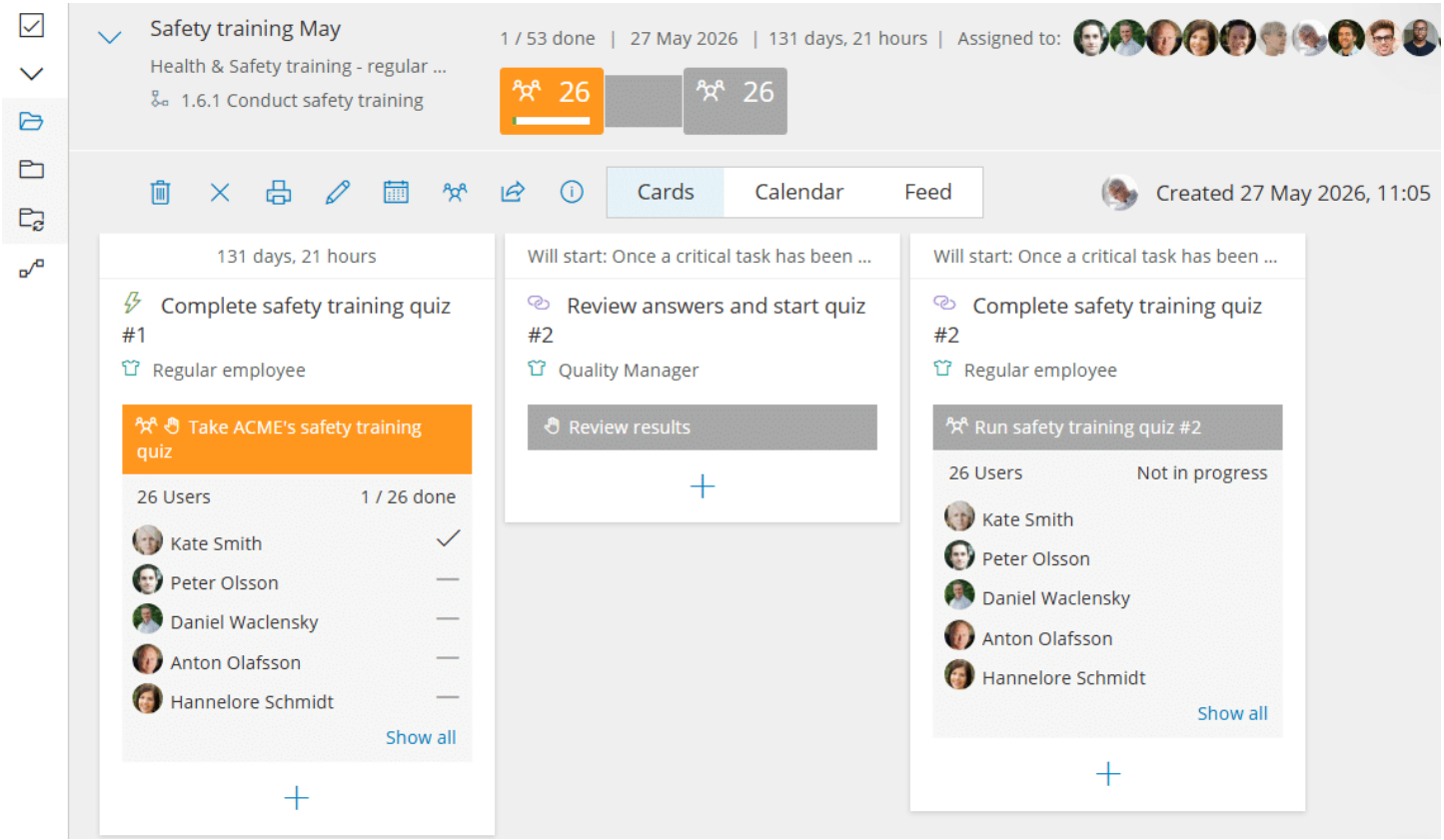
You're done once the case team shows the role or users who should each complete the task.

Track who has finished

When the case starts, each assigned user finds their own copy in **My tasks** and completes it like any other task.



In the case overview, the task card shows how many users have finished, for example **1 / 26 done**, and a tick next to each user who has completed their copy. Click **Show all** to see every assigned user.



Limitations of multi-user tasks

- Multi-user tasks are only available on case tasks. Scheduled tasks cannot be used in cases.
- Multi-user tasks require the HR Manager add-on.

Example: a safety training with a review

ACME runs its safety training as a case. In the activity "Conduct safety training", the task "Take ACME's safety training quiz" is a multi-user task. In the case team it is assigned to the role Regular employee, so all 26 employees in the role each get their own quiz.

The next task, "Review results", is a normal case task assigned to the role Quality Manager. It starts once the critical quiz task is complete, and one quality manager reviews the answers for everyone.

Read more: Tasks in Gluu: types and where to create them, Run processes as cases and Assign case tasks with case teams and template users.

FAQ - Multi-user tasks in Gluu

What is a multi-user task in Gluu?

A multi-user task is a case task that each assigned user completes individually. When the case starts, every user in the assigned role, or every named user, gets their own copy. The case shows progress such as 1 / 26 done. Use it for trainings, quizzes and sign-offs.

What plan do I need for multi-user tasks?

Multi-user tasks are case tasks, so they need the Advanced plan, and they additionally require the HR Manager add-on. To set one up you also need edit rights on the process, because the task and its case template both belong to the process.

Can a scheduled task be a multi-user task?

No. Multi-user tasks are set up through the case team in a case template, so they only exist in cases. Scheduled tasks cannot be used in cases. For recurring work, use a scheduled task, which goes to the activity's role as one task per occurrence.

How do I see who has completed a multi-user task?

Open the running case. The task card shows how many users have completed their copy, for example 1 / 26 done, and lists the assigned users with a tick next to everyone who has finished. Click Show all to see the full list of assigned users.

Can external users get a copy of a multi-user task?

Yes. In the case team you can choose a role, specific users or external users for the task. External users are added as external users in the case team rather than picked from your user list, and each of them gets their own copy like any other assigned user.