BLOG

Exciting New Task Template Enhancements

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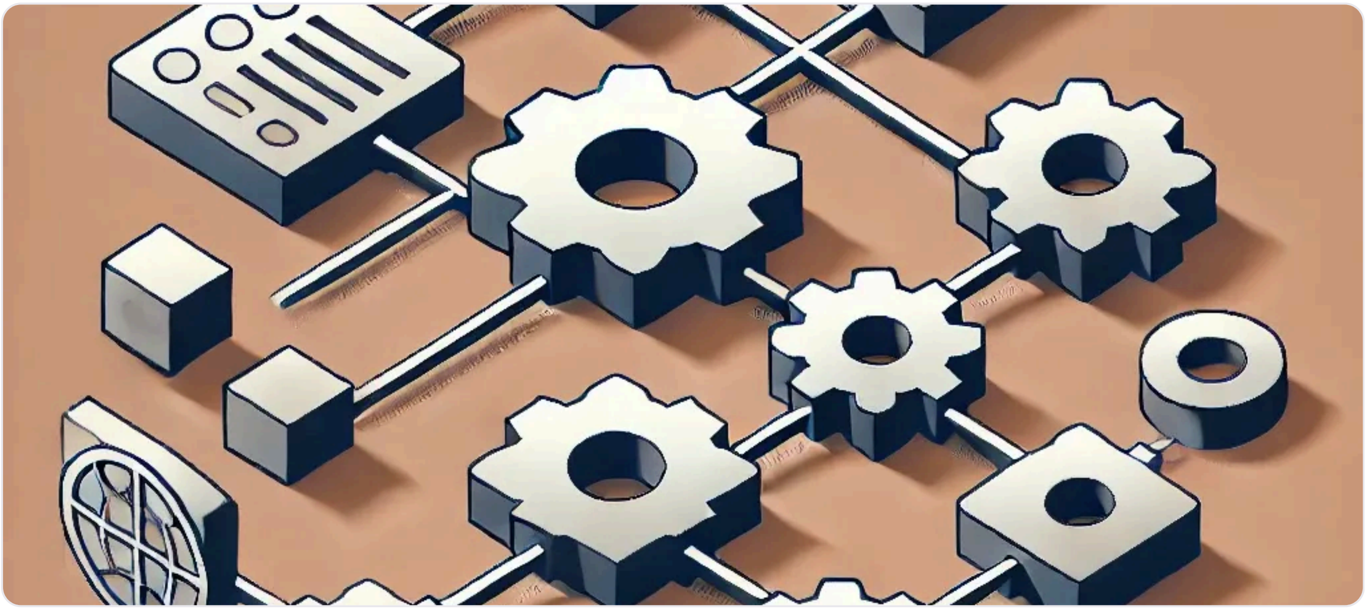
Al Torreno December 8, 2020



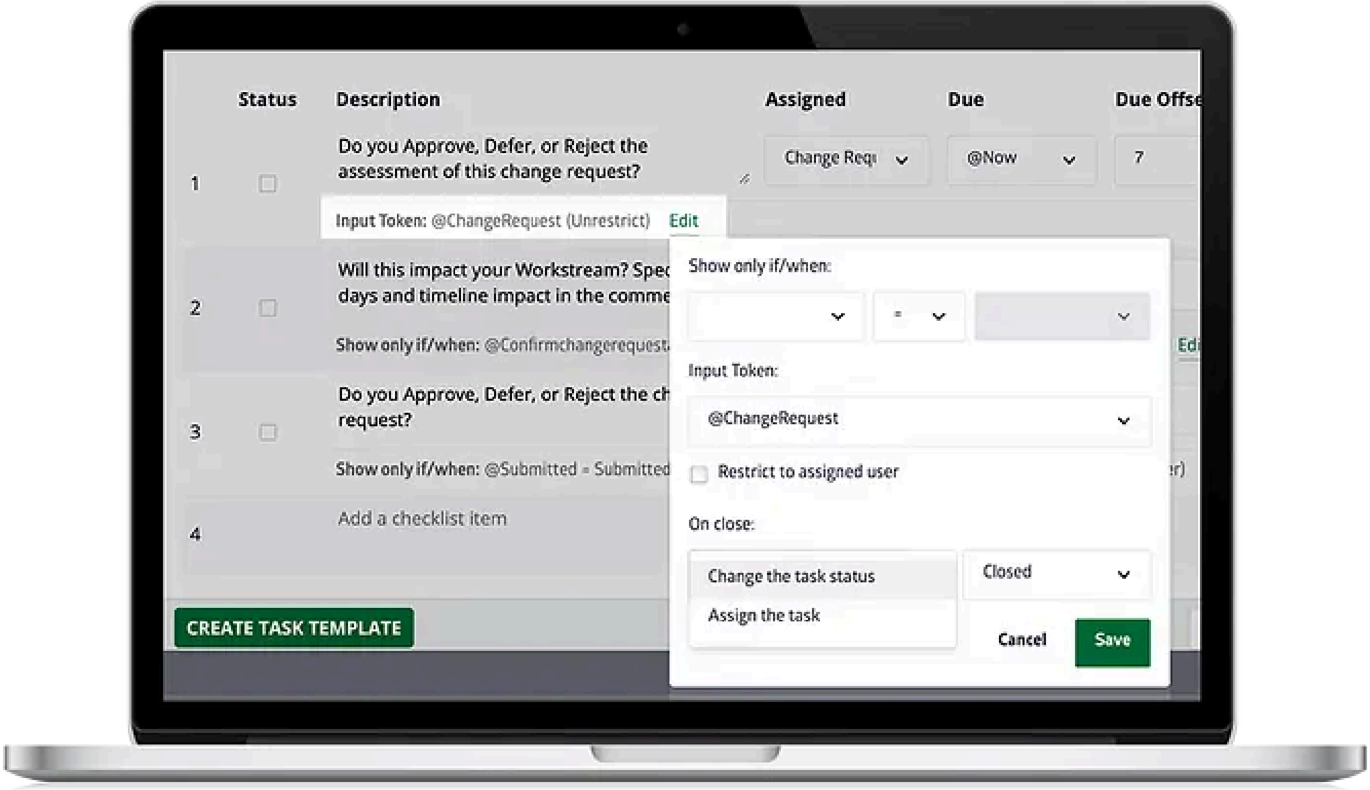
Task templates are without a doubt one of the key features in Conductor. They produce intelligent workflows that help organizations standardize existing business processes. They enable team members across different departments to collaborate in one place. Checklist items, due dates, project stages and comment threads allow teams to efficiently collaborate.

Beyond a simple one-off task, Task templates can be used to facilitate highly complex workflows. We've added several enhancements that give them new superpowers.

Dynamic workstream lead tokens

When designing a Task template, you may want to assign checklist items based on the information received from the intake form. For example, if there is a Vice President in each workstream, you may want to assign an approval action item to a different workstream VP depending on which project the task has been generated in. With global tokens, setting up Task Templates to dynamically assign checklist items is a breeze!

Workflow management



Previously, checklist items in Task templates could be shown or hidden based on a previous input. Now, you can also adjust the task's status or reassign a task based on those inputs. Here are some examples that closely model your existing workflows where we think this will help:

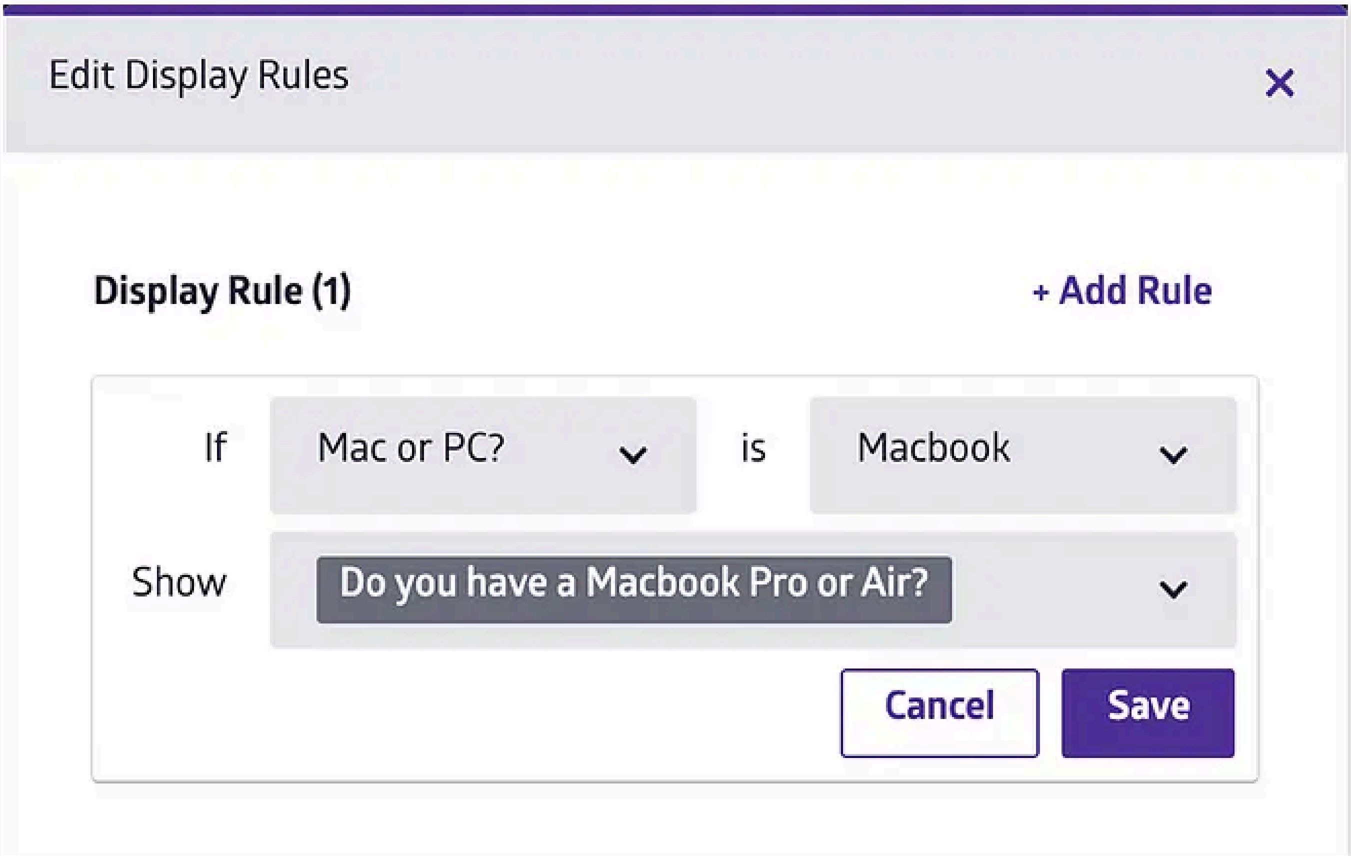
- Picture an onboarding workflow where in the first step, your HR Lead needs to perform some tasks for a new hire: add them to the payroll system, register them with the benefits provider, and review interview notes. After that is complete, the IT Lead must complete additional tasks: get their workstation set up, set up an email account, and prepare their access badge. You can configure a task template to generate checklist items as a reminder for both leads. With the new features in Task templates, you can also automatically handle the reassignment of the task (in this example, from the HR lead to the IT lead) once the final HR checklist item is marked as complete.
- You can set up a task template with multiple successive approval checklist items. When you close the final checklist item, the task status can be automatically set to “closed” so your task list is always up to date and tidy.
- You can set up a number of custom task statuses and have multiple checklist items that dynamically set a new status as each one is closed. For example, within your task template, you can configure a

checklist item titled “please review and approve” assigned to a project lead. Once the lead approves (by marking the item as complete), the task template can be configured to automatically change the task status from “awaiting approval” to “in progress”. The automatic status change benefits anyone reporting on task status to have confidence that data is up to date.

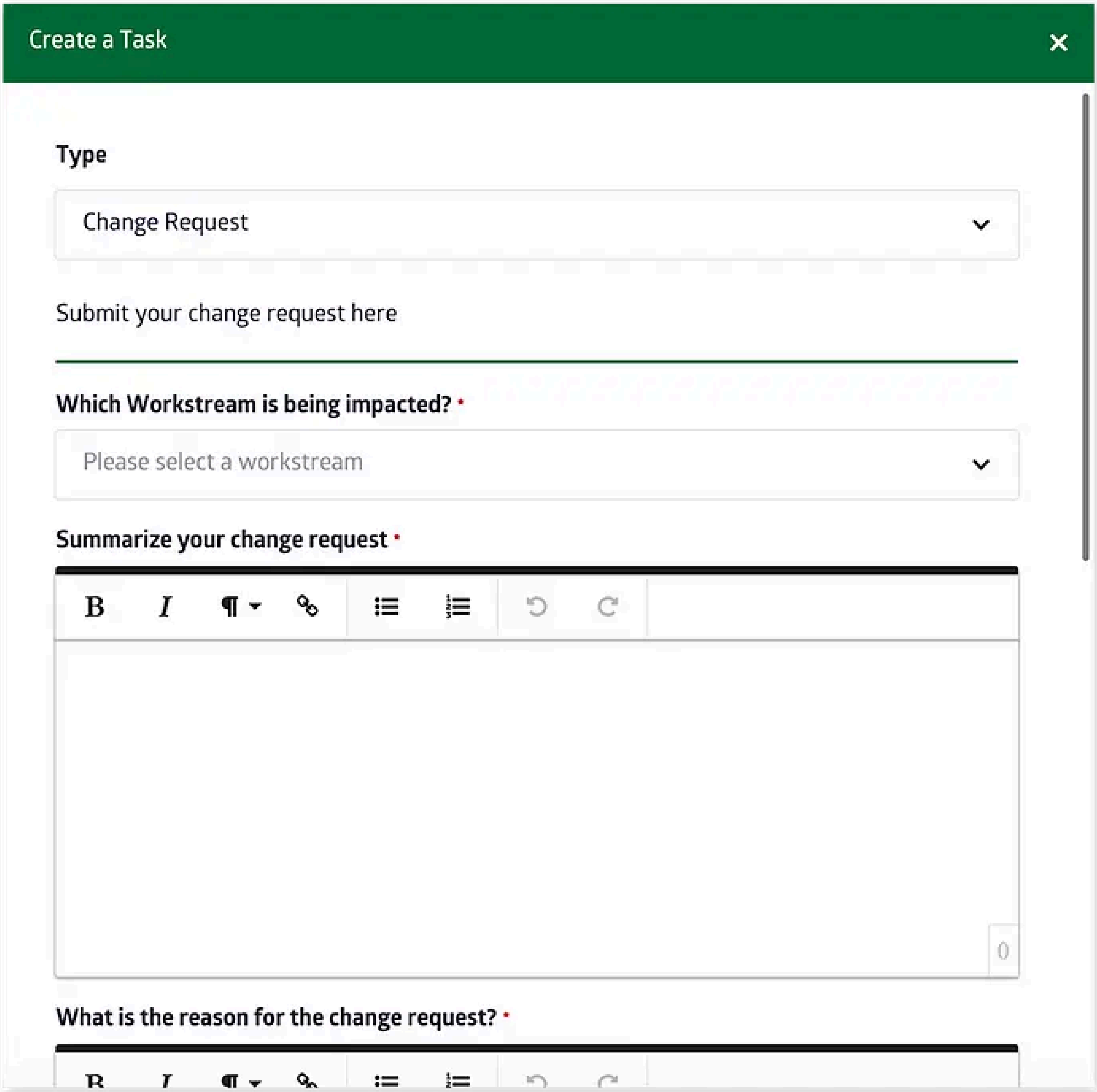
Intake forms made easier

Intake forms are used to gather information before generating a task from a Task template. We’ve added exciting enhancements that help people easily find and use them. We’ve also redesigned intake forms to match the sleek look and feel that’s seen everywhere else in Conductor.

Let’s say we’re building an intake form for a new hire. One of the questions we may need to ask is whether the new hire requires Mac laptop or PC laptop. Based on that answer, we might ask a Mac-specific question, such as whether they’d like a Macbook Air or Macbook Pro. This second question isn’t relevant if a PC laptop was selected. By using dependent questions, you can create a highly user-centric experience, asking only questions relevant to that person.



This is now possible in Task template admin! With display rules, template creators can hide inputs, and only display them based on the values selected in other inputs.



We've also improved ways to find and fill out intake forms. Task template intake forms are now displayed directly within the create task dialog (which can be loaded from any page in Conductor), allowing you to generate any task without leaving the page you're on.

We're very excited to see all the ways that our customers will use the new Task template features. We can't wait to see what you'll build with them!

READ ONLINE

Read this article on our website

getconductor.com/resources/exciting-new-task-template-enhancements

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