OnTask Feature Walk Through

Get the results you need with this guide to OnTask's features, functions, and capabilities. In this guide, we'll walk you through different features and provide resources with detailed documentation that can dive deeper into specific functionalities, implementation tips, and more.

Let's get started.

What is OnTask?

OnTask is a SaaS platform designed to solve common problems that require the creation, routing, review, and approval of documents and forms. We have all been on either the receiving or requesting end of an email that asks us to download a file, print, sign, reattach, and then email it back. There is a better way, and OnTask makes it simple.

OnTask Workflows & Block Programming

At the heart of OnTask is the workflow. But unlike other SaaS workflow platforms, OnTask requires zero programming. OnTask workflows are based on a visual block programming method that is easily accessible to anyone.

With OnTask's block programming, you can build simple workflows to collect signatures on contracts or sophisticated workflows that require document creation, routing, review, and approval. All the while, OnTask provides administrators with the tools they need to ensure that workflows are completed efficiently.
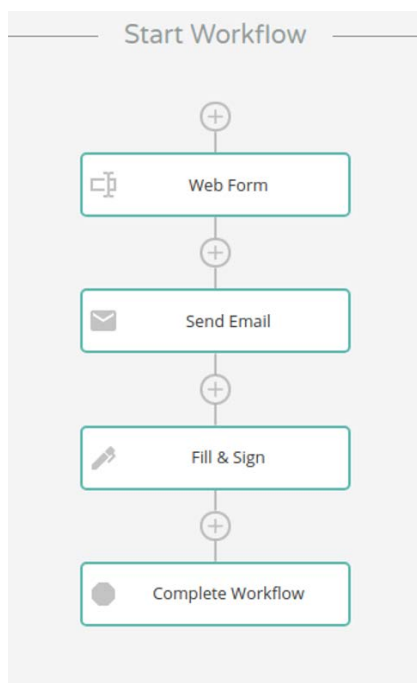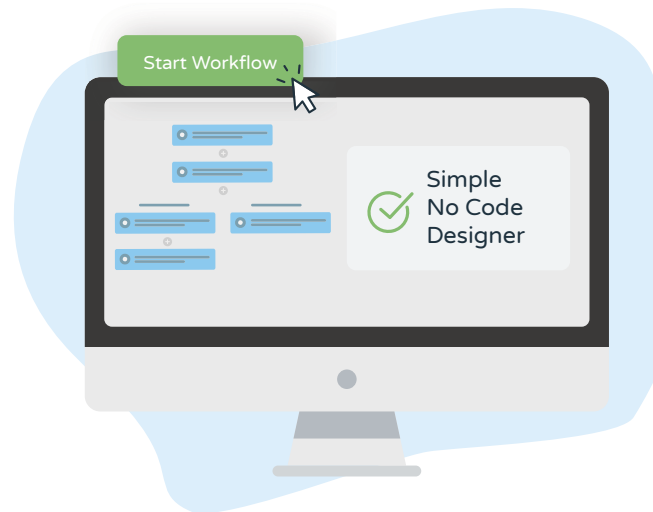
Here is a basic workflow that allows you to send an email with a request to sign a document. This is one of the many common workflow patterns used in OnTask. This basic workflow can be expanded to collect signatures from multiple people, send reminders when signers forget to respond, and more.

OnTask allows users to create reusable workflow templates using block programming and run unlimited workflows from each template. You control access to your workflows by creating multiple OnTask groups, and you can limit who you invite to each group from your team. You can also export workflows to share within your team, saving time on the creation of workflow variations.
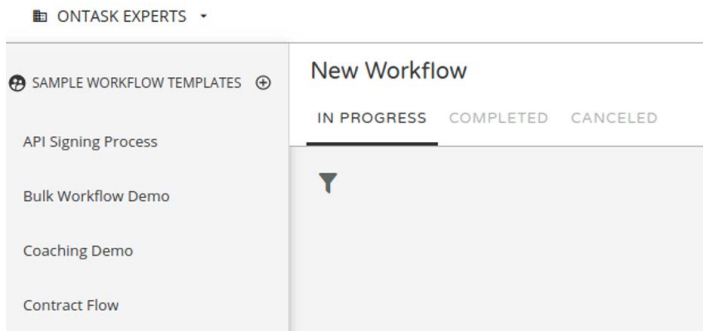
Workflow execution starts when the first task of the workflow is completed by a participant of the workflow. For example, if the first task for a workflow is a Web Form block, the workflow execution will begin when the form is submitted. This creates a workflow instance with its own set of data and associated documents.

OnTask users can monitor the execution of workflow instances in the OnTask dashboard to ensure the timely completion of tasks. Here, you can search for workflow instances that are in progress, completed, or canceled. It is also possible to monitor the workflow instance at each step of the way, to include running Admin Actions that allow you to keep your workflow progressing toward completion.
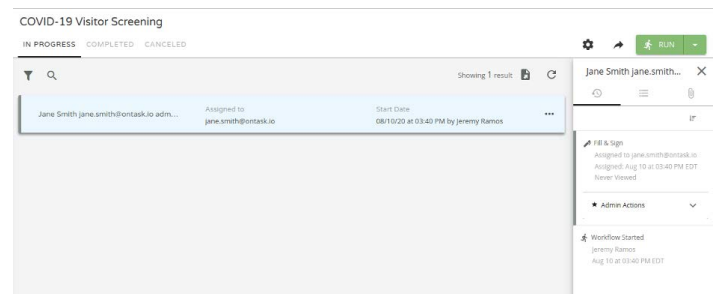

Running and Sharing Workflows

Once you have created a workflow template, there are multiple ways that you can run a workflow. By selecting Run Workflow from the template menu, you can launch the workflow manually. You can also select Share Workflow to open up the sharing options. You can share the workflow by posting or sending a hyperlink.

For example, you can insert the hyperlink into a button on a website. It is also possible to post a QR code to launch the workflow on a mobile device by simply scanning the code with the mobile camera.
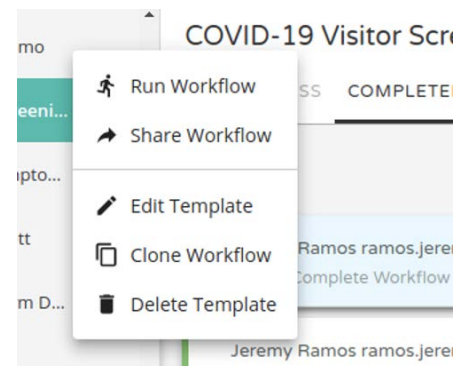
Workflow Components

The OnTask Advanced Process Builder allows users to create workflows using no-code block programming. This is a walk through of the various blocks available in OnTask. To access available blocks, click on Insert First Task in the Advanced Process Builder.
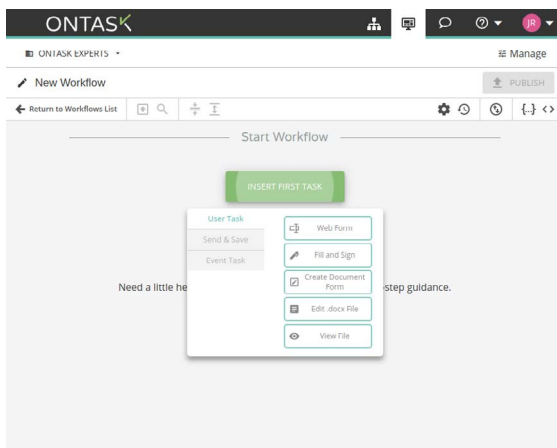
User Task

User Task blocks are workflow components that allow workflow builders to insert tasks for participants. These include tasks that involve documents, such as collecting e-signatures, and tasks that facilitate viewing documents or web forms.

WEB FORM

The Web Form block facilitates the creation of webforms using a wysiwyg interface. Web Forms are useful when collecting initial inputs for a workflow or in later steps to collect inputs from workflow participants. Most workflows can benefit from starting with a Web Form prompting users for initial inputs.
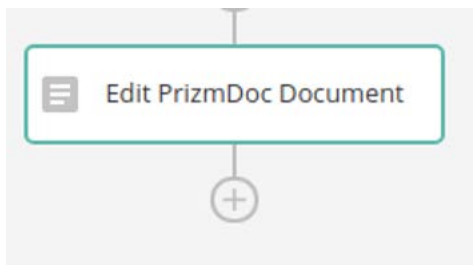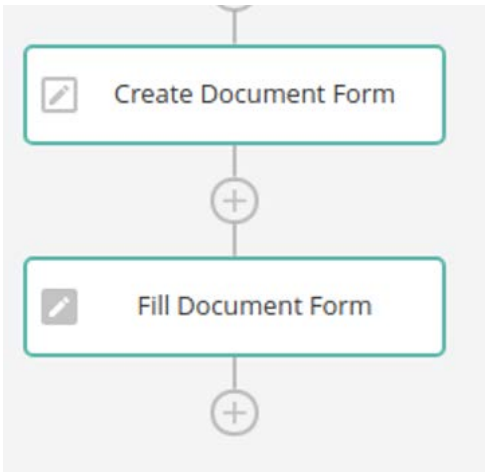
FILL & SIGN

The Fill & Sign block facilitates the importing of documents for use in the workflow to collect user inputs and signatures. With Fill & Sign you can quickly insert input fields over your existing documents and signature blocks. The Fill & Sign step "burns" the user's input onto the document with full legal compliance e-signatures.

EDIT .DOCX FILE

The Edit .docx File block allows participants of the workflow to work on a .docx document. The workflow developer can allow select participants the ability to Edit, Suggest, or View the document. This can be useful in scenarios where you would like participants to review and contribute changes to a document as part of a workflow.

CREATE DOCUMENT FORM

The Create Document Form block allows participants of the workflow to upload their own forms and prepare them for signature. It is similar to the Fill & Sign block, but differs in that Fill & Sign only allows the workflow developer to edit the form. The Create Document Form allows the participants similar functionality.

Also, the Create Document Form is always matched with a Fill Document Form block. Please note that you may insert other blocks in between the Create Document block and Fill Document Form as needed. For example, you may insert an Email block in between them to request a signature from a participant.
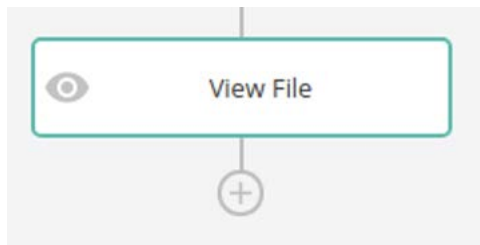
VIEW FILES

The View File block allows workflow participants to view files. This can be useful in scenarios that require a file's approval. It can also be useful when users need the ability to download a finished document.

TASK REMINDER

The Task Reminder feature is available for all User Task blocks. With the Task Reminder workflow, participants can be automatically reminded of tasks they need to complete in OnTask. This is a convenient way to keep workflows flowing efficiently with minimal oversight.
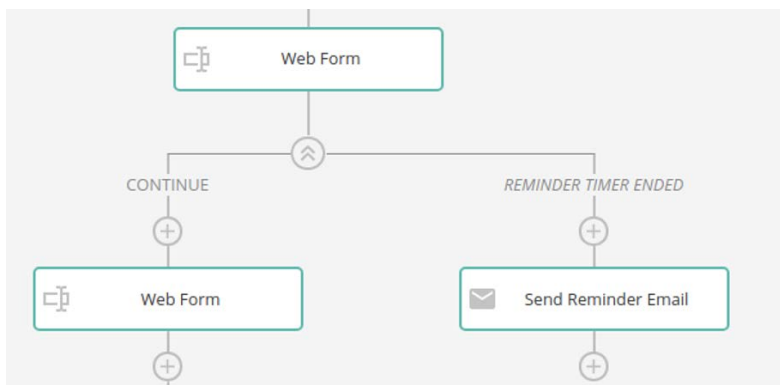
ESCALATION REMINDER

The escalation reminder is available for all User Task blocks. With the Escalation Reminder workflow, participants can be automatically alerted of tasks that require urgent attention. This is a convenient way to alert supervisors that team members need a nudge to complete a task.
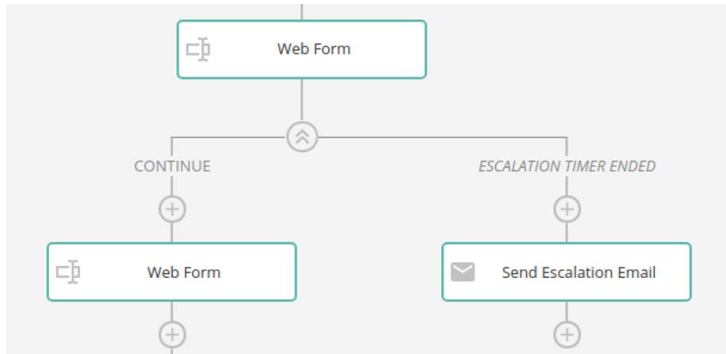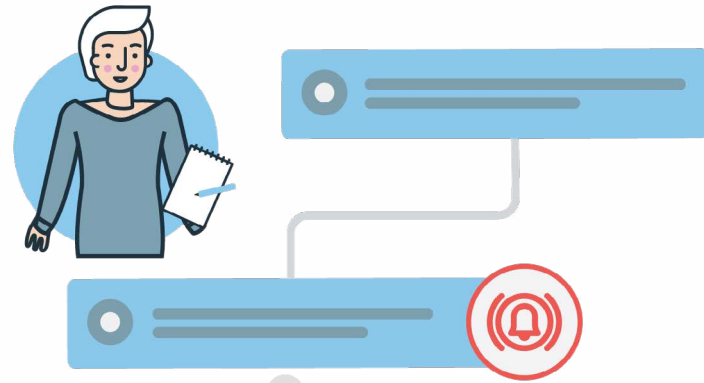
Send & Save

Send & Save blocks are workflow components that allow workflow builders to communicate with participants and export files and dates from OnTask to other systems. You could use this workflow to send a message to a user requesting the completion of a task within OnTask.
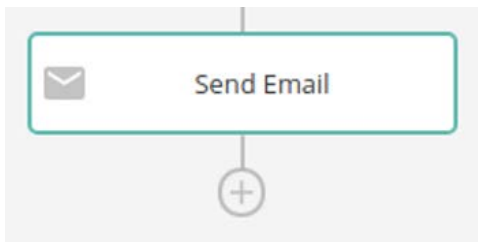
SEND EMAIL

The Send Email block allows workflow builders to send an email message to participants. With Send Email, participants can be alerted to tasks they must complete within OnTask. For example, Send Email can be used to request a participant's signature on a document.
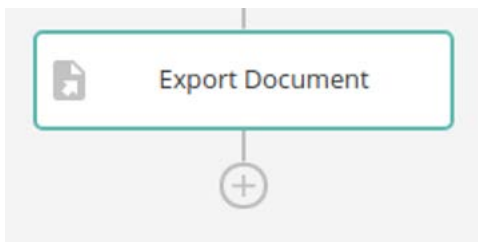
EXPORT DOCUMENT

The Export Document block allows workflow builders to send files and data from OnTask to other systems. For example, you may want to transfer a completed document to cloud file storage, or insert collected participant inputs into a database or CRM.

WEBHOOK

The Webhook block is similar to the Export Document block. It allows workflow builders the ability to trigger events in other systems by making http requests to those systems. This can be useful when there is a need to synchronize OnTask workflows with events in other systems, or allow other processes to proceed upon completion of tasks within OnTask.
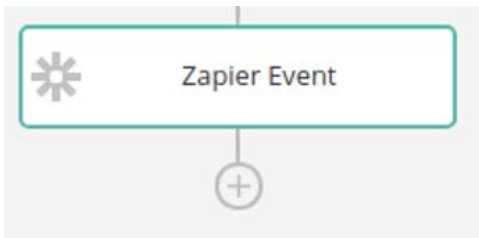
ZAPIER EVENT

Zapier is a popular SaaS integration platform that can be used with OnTask, as well as several other platforms. The Zapier Event block will allow workflow builders to connect their OnTask workflow with thousands of applications supported by Zapier.

Event Task

The blocks grouped under Event Task include a variety of functions that enable you to build more sophisticated workflows. Collectively, these blocks solve problems related to branching, workflow tracking, linking, and termination.
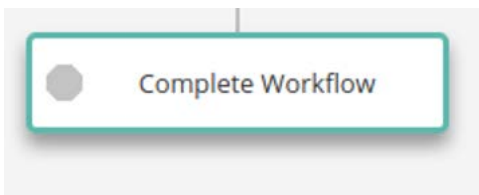
COMPLETE WORKFLOW

The Complete Workflow block is a terminal node. When a workflow reaches a Complete Workflow block, all execution of the workflow terminates. Any ongoing tasks will no longer be available to participants and the workflow will be transitioned to the Complete state.
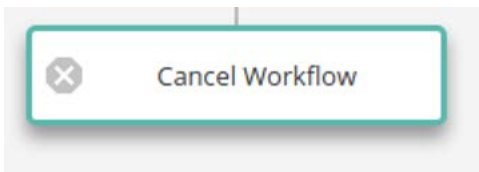
CANCEL WORKFLOW

The Cancel Workflow block is a terminal node. When a workflow reaches a Cancel Workflow block, all execution of the workflow terminates. Any ongoing tasks will no longer be available to participants and the workflow will be transitioned to the Cancel state. This block is useful for scenarios when the workflow administrator needs to know that a workflow was completed with an error or exception that may require further action.
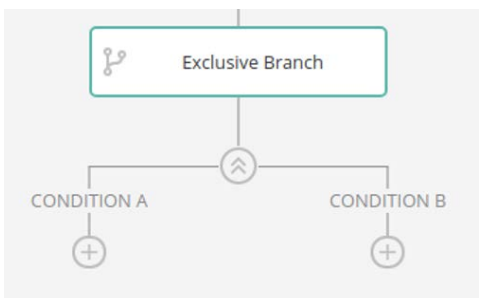
EXCLUSIVE BRANCH

The Exclusive Branch block is used to select alternate paths in a workflow based on conditional logic. This is useful when
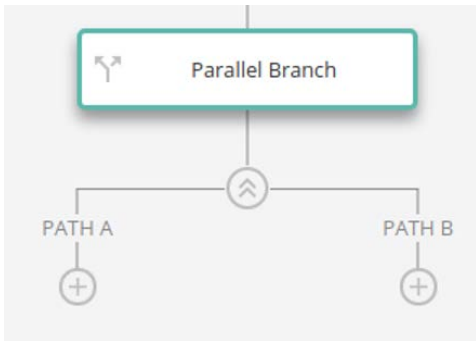
alternate paths are required based on inputs from participants to form. For example, this could include requesting delegation of a task to someone else or declining to sign a document.

PARALLEL BRANCH

The Parallel Branch block is used to execute multiple tasks in parallel. This is useful in scenarios where multiple participants can perform a task concurrently. For example, this could include multiple reviewers reviewing a document or multiple email messages being sent to various participants.

LINK

The Link block is used to redirect participants to arbitrary steps throughout a workflow. For example, Link blocks can be used to implement a "go back" functionality allowing participants to revisit prior steps in a workflow.
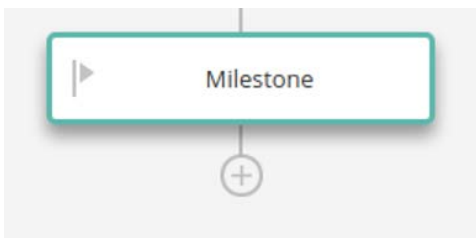
MILESTONE

The Milestone block is used to track achievements throughout the execution of a workflow. When a Milestone block is reached, the workflow administrator can see a change in the state of the workflow execution on the OnTask dashboard. This allows workflow administrators to monitor the execution process.

See OnTask in Action

OnTask is a very powerful tool, and it's even more accessible than other workflow tools due to its user-friendly interface. Non-technical users can optimize their workflows with OnTask using block programming. Ready to start learning by doing? Start your Free 14-Day Trial today!

If you'd like other resources to help you get started, check out our Resource Library and our Help Center or see how to use OnTask?