Configure Task Conversation Type

> Starting with V10.0, Cora SeQuence has been renamed to Cora Orchestration.

V9.7 and later

Overview

Task conversation type is a Conversations View component that enables the end-users to create ad-hoc tasks and monitor new tasks from within the case conversations.

Configuring a Task conversation type is similar to configuring other conversation types.

> **IMPORTANT**
> Ad-hoc conversation tasks are Conversation View records. To make them actionable, you need to set up an infrastructure to create and send the actual task to the relevant recipients. You can use the State Triggered Workflows or the Client API for this purpose.

Enable Task conversation item

1. In the Administration site, select the Solution for which you want to enable the Task conversation.
2. In the Solution Components section, click **Conversations View**.
3. In the Conversation View window:
   a. Under **General Setting > Conversation Types,** select the **Task** conversation type.
   b. under **General Setting > State Triggered Workflows,** add status change handlers for event handling.
      For details, see the Configure state triggered workflows section below.
   c. Under **Task Settings,** add task templates and types.

Task settings

Task setting	Description	Parameter
Task Templates	Create task templates that can be applied by the end users when setting up a task.	- Name: Template name - Alias: Template alias - Subject: Task subject - Message: Task message

Task setting	Description	Parameter
Task Types	Set up the types of tasks end users can select while creating tasks. For example, you can create a task for SMEs, SME Request. You can customize the content of the recipients list, and assign existing task templates to a particular task type.	• Name: Task type name • Alias: Task type alias • Customize Recipients Picker: Select to customize the content of the recipients list. • Add Template: Assign existing task templates to a task type.

Add Task conversation type to the Conversations View through built-in command

To add Task conversation type to the Conversations View, you can use the Create Conversation Item built-in-command.

1. Add a Built-In Command activity.
2. Select **Case Operations > Create Conversation Item**.
3. Click **Next**.
4. Add the following command parameters:
   - workflowInstanceId: the master or the sub workflow Id.
   - conversationItemState: *Incoming*, but can be any state.
     For details, see this article.
   - ConversationItem: *TaskConversationItem*
     - ToId: The Id of the user or group the task is to be assigned to.
     - ToType: Value can be User or Group.
     - Completed: whether the task appears completed or not. Relevant only for *Incoming* state. Value can be True or False.
     - Subject: Task subject.
     - Type: type of the task.
     - DueDate: due date of the task. Relevant only for *Sent* state.
     - RelatedConversationItem: link between the sent and response tasks. The value should be the ConversationItemId.
     - Body
     - Attachments
   - createdByUserId: the current user executing the built-in command.

4. Click **Finish**.

> **IMPORTANT**
> Make sure you have *Execute* permissions in the master workflow.

Configure state triggered workflows

You can set workflows that are triggered automatically as soon as the Task status changes. For details on configuring state triggered workflows, see the Configure state triggered workflows section in this article.

For details on supported states, see this article.

Language support

Localization of Task conversation type is supported by default.
For details on multilingual configuration, see this article.

The conversation component is translated according to form's *Globalization* settings:

- if *Localizable* = False, use the *Language* activity definition
- if *Localizable* = True, use the user's language