Managing Tasks

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Overview

Tasks are a new content type in the Userlane Editor designed to power the Task Success analytics page in the Userlane Portal. Unlike Guides or Announcements, Tasks have no end user–facing UI. Once created, saved, and activated, a Task works silently in the background, collecting data about key user interactions (called Actions) and sending this data to Userlane HEART analytics.

This allows enterprises to gain visibility into how their employees engage with business-critical processes; helping leaders ensure ROI on software investments and drive higher productivity across the organization.

Why Tasks Matter

For enterprises, simply knowing that employees have access to software is not enough. The real question is:

- Are employees actually completing the critical workflows that drive business value?
- Where do they get stuck, and how much time do these processes take?

Tasks provide the answer. By defining multi-step workflows and automatically measuring completion and time-to-completion, Tasks give enterprises a new layer of visibility into digital adoption.

Business value for enterprises

- Measure adoption of 3rd-party software: Track whether employees complete the key workflows the software was purchased for.
- Identify friction points: See where users drop off and which steps block success.
- Quantify ROI: Link real adoption and task success data to your software spend.
- Optimize productivity: Ensure employees can complete their tasks effectively, improving business outcomes.

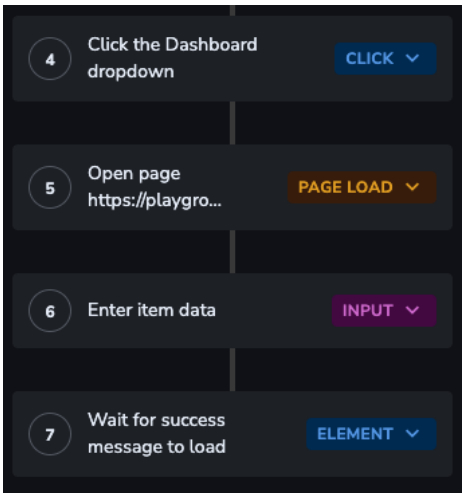
How Tasks Work

A Task is made up of at least two Actions (required so we can calculate completion rates and times). You can add as many Actions as needed to represent the real-world flow you want to measure.

There are four types of Actions available:

- Click Action: Tracks when a user performs a left click on a selected UI element.
- Input Action: Tracks when a user focuses on an input field. (The data entered is not collected, only the fact that text was entered.)
- Page Action: Tracks when a user arrives at a specified URL. You can configure URLs with wildcards for dynamic parameters (e.g., family.userlane.com/app/*/analytics/content/overview).

- Element Action: Tracks when a selected UI element loads in the application.



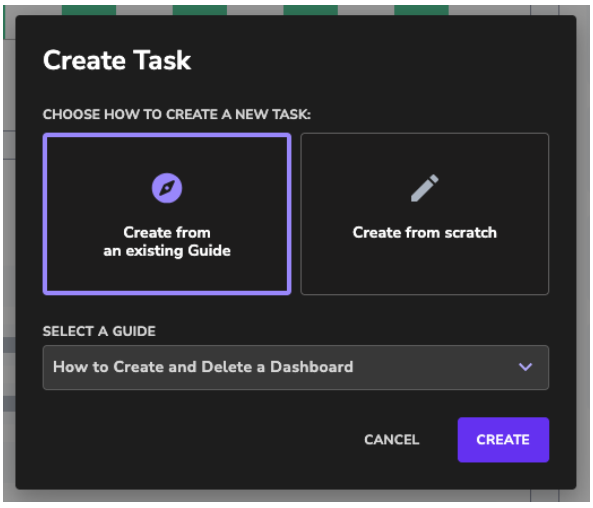
Note: Click, Input, and Element Actions are recorded by selecting UI elements during recording. Page Load Actions are configured directly in the Editor Panel.

Creating a Task

There are two ways to create a Task in your application using the Userlane Editor.

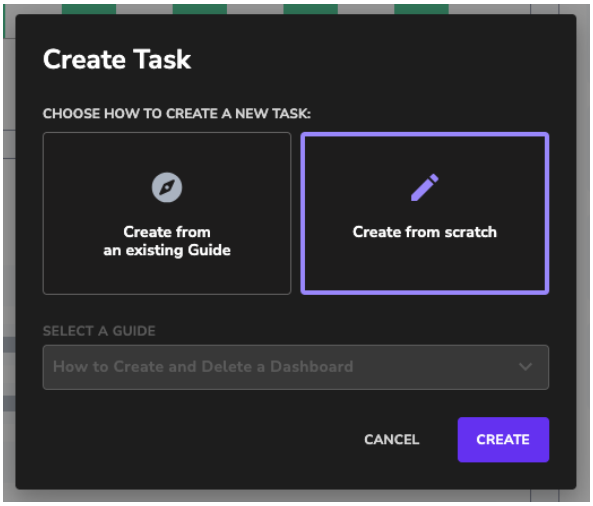
1. Create a Task from an existing Guide

1. In the Userlane Editor, click Create Task
2. In the modal, select Create from an existing Guide.
3. In the dropdown, select the Guide you want to create a Task from.
4. Userlane automatically creates Task Actions from Guide Steps.
5. Review and adjust the Actions as needed.
6. Save and activate the Task.



2. Create a Task from Scratch

1. In the Userlane Editor, click Create → Task.
2. Enter recording mode.
3. Record at least two Actions by selecting elements or configuring Pages.
4. Review the Actions in the Editor Panel.
5. Save and activate the Task.



Where Task Data Appears

Once activated, your Task continuously collects Action data. This data is sent directly into HEART analytics, powering the Task Success page in the Userlane Portal.

From here, you can see:

- Task completion rates
- Time to completion
- Drop-off points

These insights allow enterprise leaders to monitor adoption, evaluate efficiency, and make data-driven decisions about their digital workplace tools.

FAQs

Do end users see Tasks?
No. Tasks run entirely in the background and have no UI components.

Why do Tasks require at least two Actions?
With only one Action, we cannot calculate important metrics like completion rate or completion time. Two or more Actions ensure the data is meaningful.

Can I still use Tags?

Tags remain available but are best suited for single interactions. For multi-step workflows, Tasks should be used.