01/09/2019

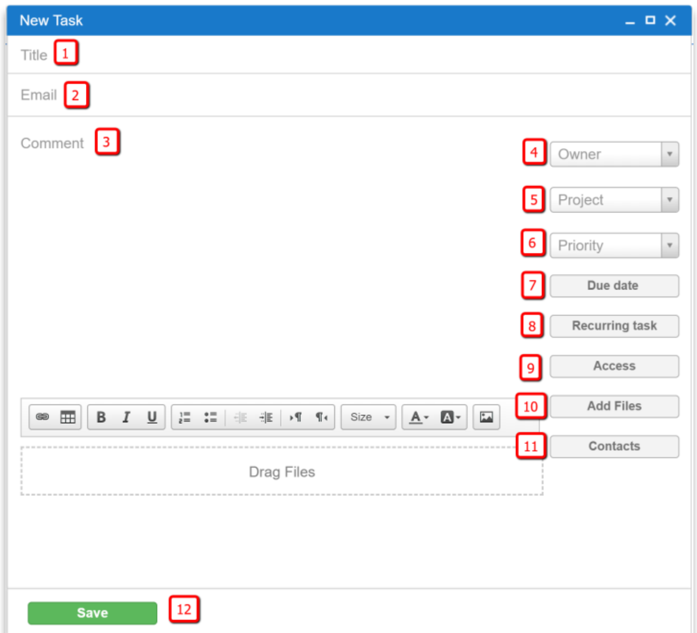
Team.Do – Creating and Updating Tasks:

1. Creating a New Task:

You can create a new task by clicking on the 

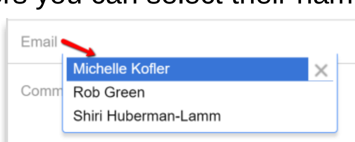
on the Tasks page.

A “New Task” window will open, with the following fixed attributes/fields:



✦Tip: New Tasks can also be created from the Gantt Chart.

1. Title: Task title is a mandatory attribute. Without one, the task won’t be created. Task title can be edited at any stage by the task creator, admin or project manager.
   ✦Tip: It is helpful when task titles state clearly what the task is about. For example: “*Design Graphics for Email Campaign*” or “*Update Product Development Roadmap*”

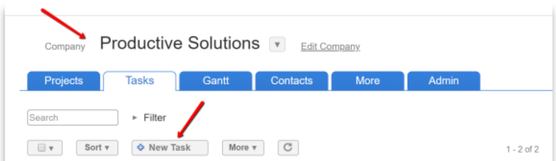
2. Email: Here you can determine who will receive alerts regarding the task. When selecting the task owner his/her name will be added automatically to the email list. If you wish to notify additional users you can select their name from the users list
   

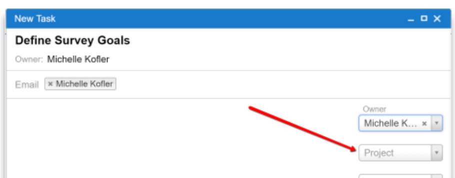
   involved in the specific project:
   Please Note: Alerts can be sent to **registered** users (in Team.Do) only.

3. Comment: This field is for task’s instructions. Here you can specify all that needs to be done in this task. The rich text editor allows you to design the content as needed

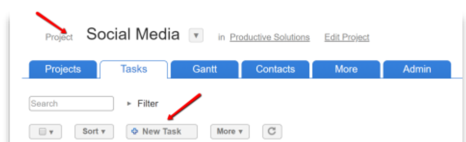
(change font size, color and highlights, add a table, add links, use numbered or bulleted lists, control text direction and indentation and add an image).

4. Owner: Here you select the Task's owner from the list of registered users. Once the user is selected his/her name will be added automatically to the Email field as mentioned above.
   ✦Tip: If you cannot find a certain user on this list, check if they are involved in this project (have permission to access this project).

5. Project: Project is a way to group tasks together. When creating a new task or sub-task, you need to associate them to a specific project. If a task is created under the Company 

and no project is selected 

the task will be associated to the systems default project "Activities".

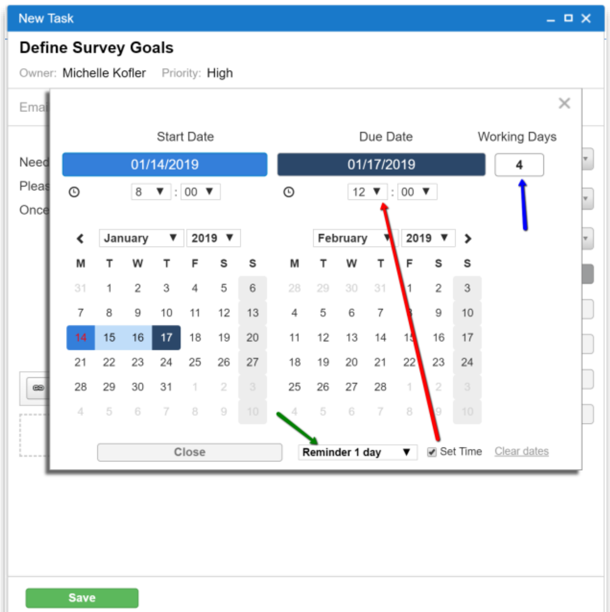
   When a task is created under a specific project 

, it will be automatically associated to it 

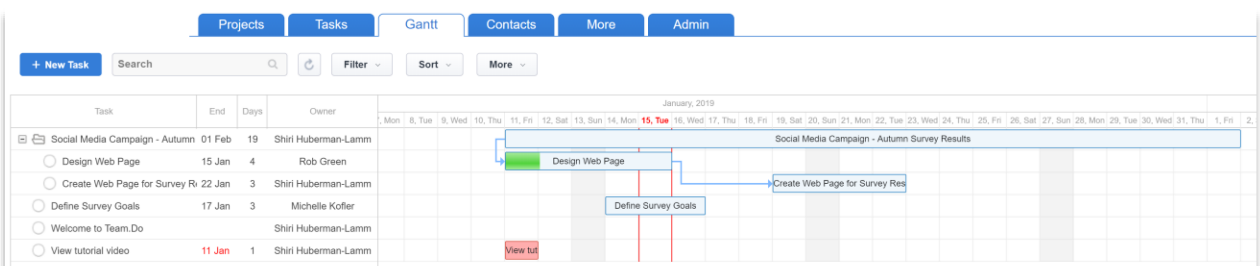
, you can select a different project if needed.

6. Priority: There are 4 predefined priority levels: Urgent, High, Normal and Low. Urgent tasks will be marked with Red next to their titles and High will be marked in Blue. Normal and Low are not marked so the first two can stand out.

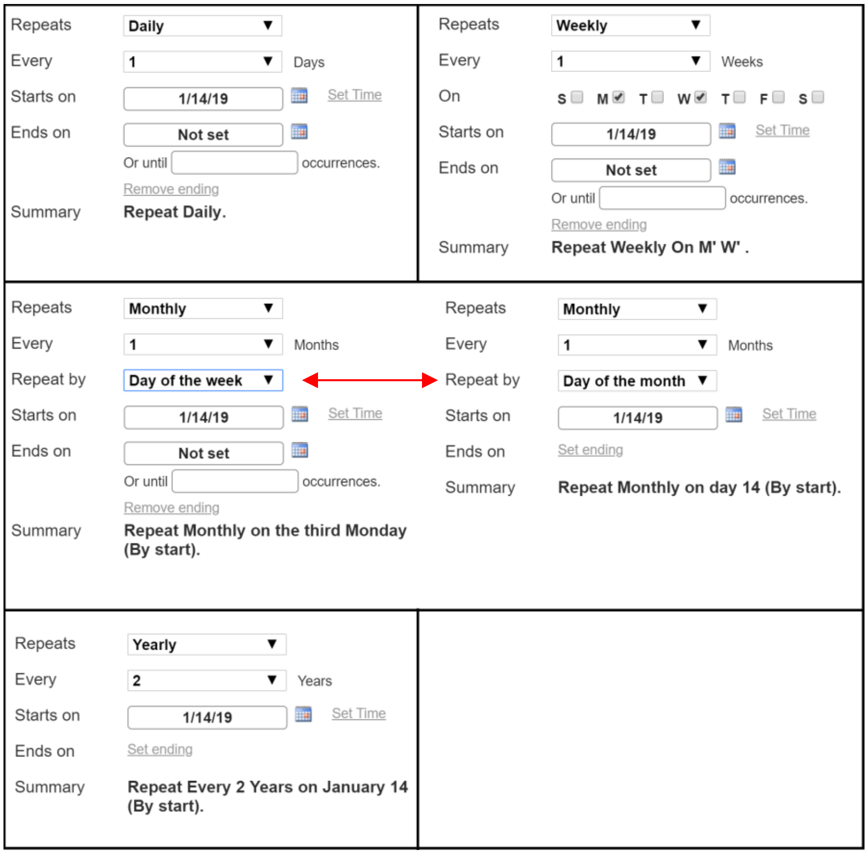
7. Due Date: Set task's Start and End Dates and Time. Set reminders: System default is “Reminder 0 minutes” = 7AM the day task’s end date.



Setting task Due Date will automatically display the task on the **Gantt chart** and allow synchronization with **Google and Outlook Calendars**:

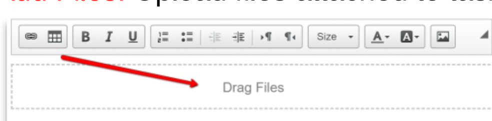


8. Recurring Task: For tasks that happen on a regular basis, you can create a Recurring Task. You can define task repetitions – daily, weekly, monthly, yearly. Set the start day and date and when should the repetition end (either on a specific date or after X occurrences).



9. Access: Team.Do allows you to share and collaborate with team members. You can share a task by granting access to it. Once you select users, their names will be added automatically to the Email field.

10. Add Files: Upload files attached to task by dragging them to the designated area

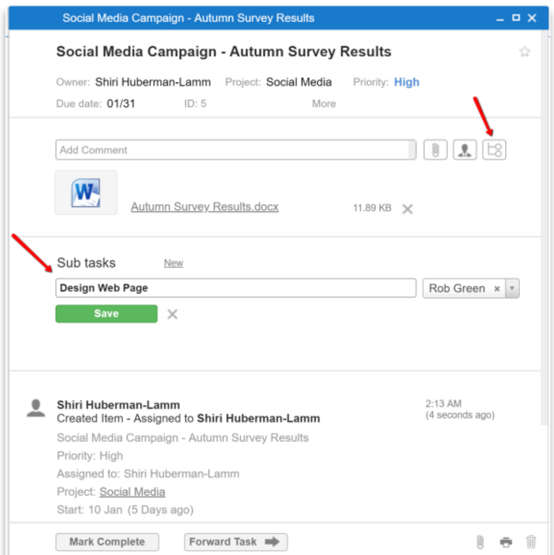


on the task or simply click on the Add Files button and select the relevant files to upload.

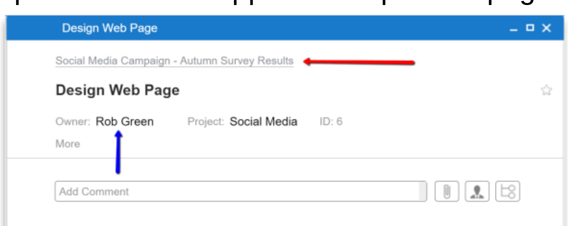
11. Contacts: Pull contacts info directly into task. Contact's phone no. and email address will be displayed in the task with a link to his profile.

2. **Dynamic Fields:** System Admin can design the task form by defining Dynamic Fields. This allows a company to capture data in a more structured manner and make sure required information is filled out with mandatory fields.

3. **Creating Sub-Tasks:** Open the task, click the Sub Task icon. A Sub Tasks section will appear, type its title and select an owner. If you do not select an owner, it will automatically be assigned to you. Click Save to create the sub task.

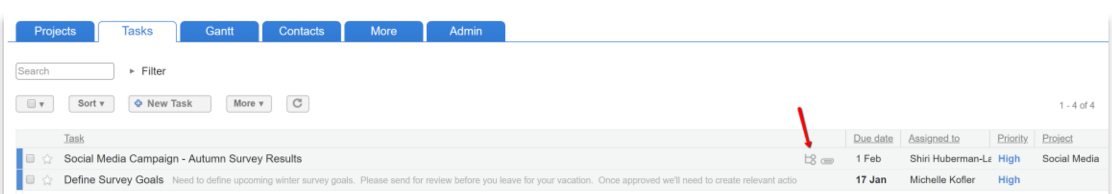


To set due date and update its content, click on the sub task title. It will open the sub task page. A link to the parent task will appear on top of the page.



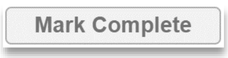
To enter the Update mode, simply click on the Owner or Project's name and now you can update all the relevant data.

Parent tasks will be marked with the sub tasks icon on the Tasks table



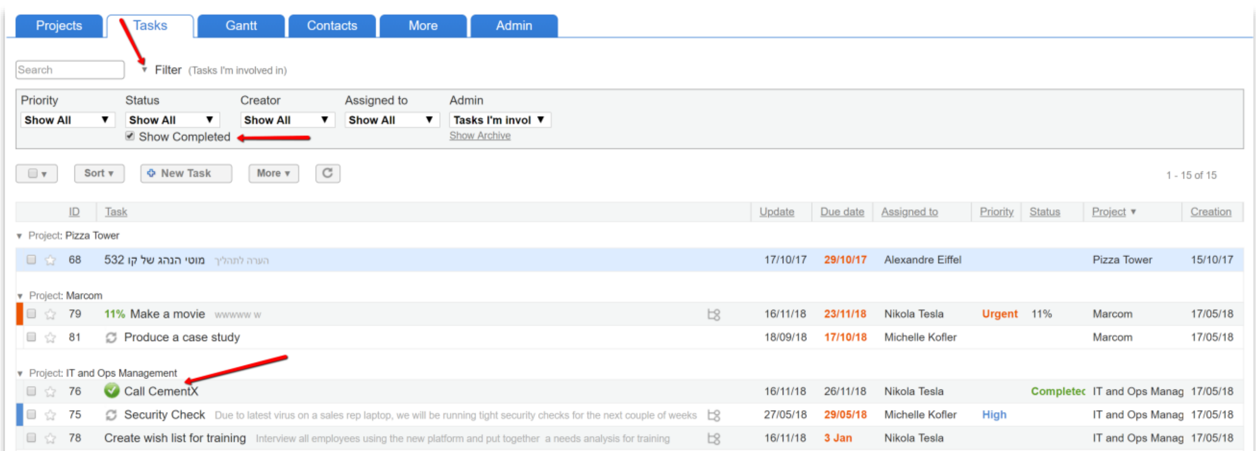
Please Note: Accessing sub tasks on the Tasks page is through parent tasks. Sub tasks will not appear on the Tasks table. They will be returned in search results and displayed directly.
Also, they are displayed on the Gannt chart.

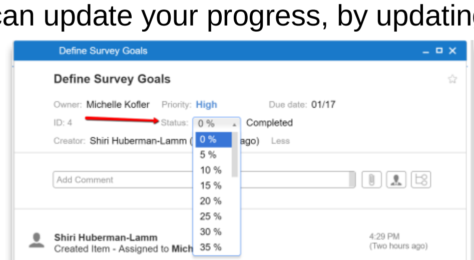
The link on the email/mobile notification will open the sub task directly.

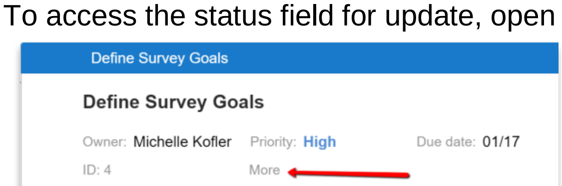
4. **Updating Tasks:** In general, all users (except users with "Viewer Only" permission) can mark tasks as Completed, add a comment, update dynamic fields. When clicking on the 

button, the task will open in Update mode and you will be able to add a comment.

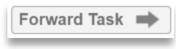
Tasks marked as Completed will be marked with icon. Once Tasks page is refreshed Completed tasks will disappear from the tasks table. To view Completed tasks, you should check the "Show Completed" checkbox under the Filter menu:

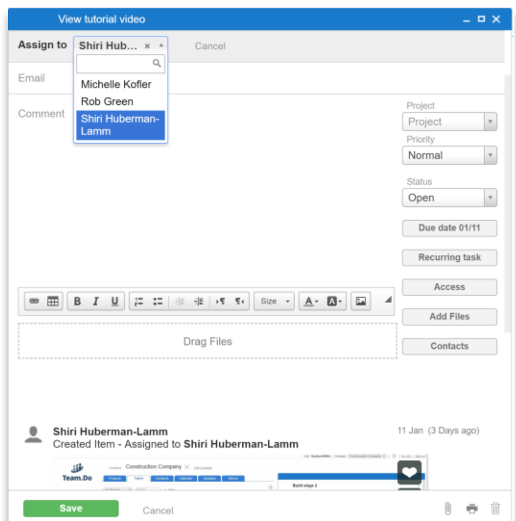


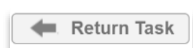
You can update your progress, by updating the status field and selecting the % of work done 

. To access the status field for update, open the task and click "More" on the task header 

.

Transferring a Task: You can **Forward** a task to another user, thus making him/her the new Owner. Once you click the  button, the task will open in Update mode ready for you to select the relevant user. Click the Save button to forward the task.



Returning task to the previous owner: Click the  button to return the task to the user who forward it to you. The task will open in update mode with the previous owner's name automatically selected. Click the Save button to transfer the task.

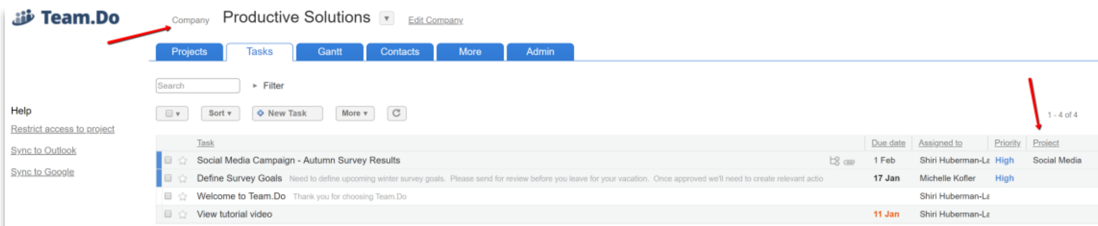
Updating task Data: Task Creator, Admin and Project Managers can update additional information such as Due Date, project, recurring task, send task to Archive…
Other users with access to task, including task owner cannot update this fields.
Please note: This can be changed per company's policy. Admin can modify system permissions to allow Employees (permission level) to change such task data.
External Users will not have this permission.

All cations and updates of task is saved and displayed on the task. In addition to task reminders, users involved in the task will be notified when it has been modified. These alerts depend also on each users' alerts preferences.

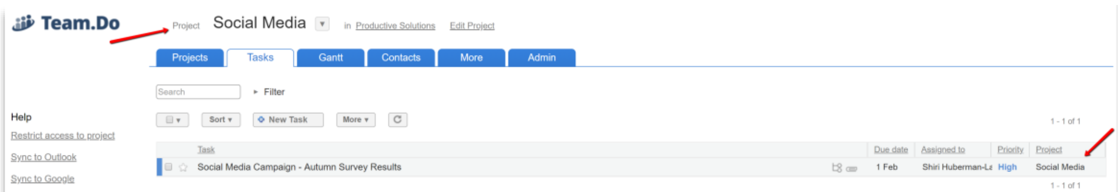
5. **Tasks Display on Tasks Page:** Tasks are displayed according to user's permissions. Admin and Project Manager can currently see all tasks in all projects. Employee, External User and View Only users will see by default only tasks they are involved in directly either as task Owners or after being granted access to them.
Tasks can be filtered and sorted:

a. Initial **filtering** can be done by selecting the view level:

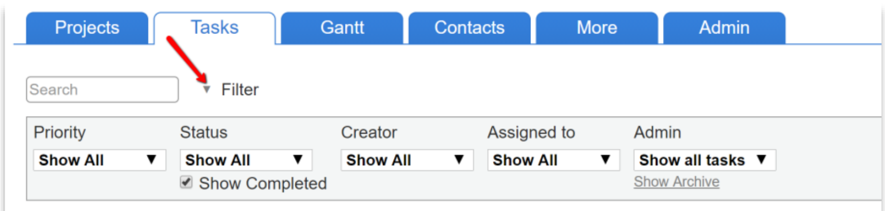
- Company level – displays all tasks of all projects in the system. For user's who are not Admin and PM, it will display only tasks from projects they are allowed to view



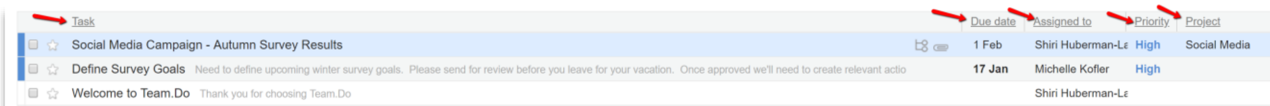
- Project level view – displays only tasks under the selected project

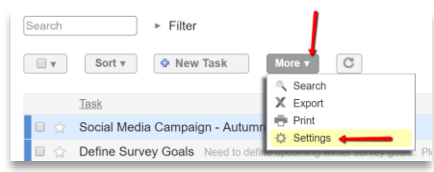


b. For additional filters, use the Search field and Filter menu. Click on “Filter” to open the menu.



c. Sorting can be done by clicking on the column headers in the Tasks table





Two levels sorting can be done on the settings menu:

1. Sorting: Select the column and direction (ascending vs. descending) of the top level than select column and direction of secondary (internal) sorting criteria.
2. Display/Hide Groups: Set tasks grouping in table.
3. Select Columns for display on the tasks table: Once selected (checked) column will immediately appear on screen. Dynamic Fields are included (look for their captions).

d. Export – Filtering and sorting results cam be exported to Excel to create reports.