

Team.Do – Creating and Updating Tasks:

New Task

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:

New Task	- • ×
Title 1	
Email 2	
Comment 3	4 Owner 🔻
	5 Project 🔹
	6 Priority
	7 Due date
	8 Recurring task
	9 Access
(∞ Ⅲ) B I U := := :: :: :: :: :: :: :: :: :: :: ::	10 Add Files
	11 Contacts
Drag Files	
Save 12	

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

- 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

Email		
	Michelle Kofler	×
Comm	Rob Green	
	Shiri Huberman-Lamm	

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 subtask, you need to associate them to a specific project. If a task is created under the

	company Productive Solutions 💌 Edit	20mpany	
	Projects Tasks Gantt Contacts	More Admin	
	Search Filter		
	Sort v Sort V New Task More v C	1 - 2 of 2	
Company			and no project is selected
New Task	_ ¤ ×		
Define Survey Goals Owner: Michelle Kofler			
Email × Michelle Kofler			
	Owner Micheille K × ×		
	Project		
	Priority	the test will be a	

default project "Activities".

the task will be associated to the systems

		Project Social Media In Productive Solutions Edit Project Projects Tasks Gantt Contacts More Admin Search + Filter
When a task is created under a specific	c project	🛛 🔹 Sort 🔻 🔍 New Task 🛛 More 🗙 🤇
	New Task Title Project: Social Media Email	- • x
		Owner Project Social Me *
it will be automatically associated to it		, you

can select a different project if needed.

iii Team.Do

- 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.

New Ta	ask															- 4	×
Defin	e Su	rvey	Go	als													
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- 1	31	1	2	3	4	5	6	28	29	30	31	1	2	3			
- 1	14	8	9	10	11	12	13	4	5	6 12	14		9	10			
- 1	21	22	23	24	25	26	20	18	12	20	21	22	23	24			
8	28	29	30	31		2		25	26	27	28	1	2				
	4	5	6		8			4	5	6		8	9				
				С	lose			R	emine	der 1 d	lay	¥	✓ Se	t Time	Clear (<u>iates</u>	
_																	-
	Save																

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

	Pro	ojects	Tasks	G	Gantt		Cor	ntacts		Мо	re		Admi	in																			
+ New Task Search			C Filter		Sort	*	Mor	e ~																									
Task	End	Davs	Owner									J	anuary, 2	019																			
				, Mon 8	8, Tue S	9, Wed	10, Thu	11, Fri	12, Sat	13, Sun	14, Mor	15, Tue	16, Wei	d 17,	Thu 18, F	Fri 19	9, Sat	20, Sun	21, Mc	n 22, Tu	23, W	ed 24, T	nu 25, P	Fri 2	6, Sat 2	27, Sun	28, Mc	in 29,	Tue 30	, Wed 3	, Thu	1, Fri	2,
🖃 🔄 Social Media Campaign - Autumn	01 Feb	19	Shiri Huberman-Lamm				Н									S	ocial	Media C	ampaig	n - Autur	nn Surv	ey Resu	ts										
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O Define Survey Goals	17 Jan	3	Michelle Kofler								Defin	e Surve	/ Goals																				
O Welcome to Team.Do			Shiri Huberman-Lamm																														
 View tutorial video 	11 Jan	1	Shiri Huberman-Lamm					View tut																									



 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).

Repeats	Daily V	Repeats	Weekly V
Every	1 ▼ Days	Every	1 ▼ Weeks
Starts on	1/14/19 Set Time	On	S MØT WØT F S
Ends on	Not set	Starts on	1/14/19 🛅 Set Time
	Or until occurrences.	Ends on	Not set
Summary	Remove ending		Or until occurrences.
Summary	Repeat Dany.	Summary	Remove ending Repeat Weekly On M' W' .
Repeats	Monthly V	Repeats	Monthly V
Every	1 V Months	Every	1 V Months
Repeat by	Day of the week ▼	Repeat by	Day of the month
Starts on	1/14/19 Eet Time	Starts on	1/14/19 Et Time
Ends on	Not set	Ends on	Set ending
	Or until occurrences.	Summary	Repeat Monthly on day 14 (By start).
Summary	Remove ending Repeat Monthly on the third Monday (By start).		
Repeats	Yearly V		
Every	2 Vears		
Starts on	1/14/19 III Set Time		
Ends on	Set ending		
Summary	Repeat Every 2 Years on January 14 (By start).		

- 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.

Comment ID: 5 More Add Comment ID: 5 More Add Comment ID: 5 ID: 5 Autumn Survey Results.docx 11.89 KB × Sub tasks New Design Web Page Rob Green Save ×	A second seco	Hubermen Len	Designet Co	aial Madia 🛛	single High	
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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.

Design Web Page		_ = ×
Social Media Campaig	n - Autumn Survey Results	_
Design Web Pa	ge	<u>ģ</u>
Owner: Rob Green	Project: Social Media ID: 6	
Add Comment		

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 \heartsuit 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:

Projects Tasks Gantt Contacts More Admin								
Search • Filter (Tasks I'm involved in)								
Priority Status Creator Assigned to Admin Show All Show All Show All Tasks I'm invol Ø Show Completed Show All Show All								
Sort * O New Task More * C							1 -	15 of 15
ID Task		<u>Update</u>	Due date	Assigned to	Priority	Status	Project V	Creatio
Project: Pizza Tower								
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Project Marcom								
🔲 🏠 79 11% Make a movie 🗤 🗤 🗤	Ľ8	16/11/18	23/11/18	Nikola Tesla	Urgent	11%	Marcom	17/05/
🖹 🎡 81 🖉 Produce a case study		18/09/18	17/10/18	Michelle Kofler			Marcom	17/05/
Project: IT and Ops Management								
🗉 👷 76 🛛 🚱 Call CementX		16/11/18	26/11/18	Nikola Tesla		Completed	IT and Ops Manag	17/05/
🖹 🏠 75 🖉 Security Check Due to latest virus on a sales rep laptop, we will be running tight security checks for the next couple of weeks	Ľ8	27/05/18	29/05/18	Michelle Kofler	High		IT and Ops Manag	17/05
Create wish list for training Interview all employees using the new platform and put together a needs analysis for training	E8	16/11/18	3 Jan	Nikola Tesla			IT and Ops Manag	17/05

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

	Define Survey Goals	_ = ×
	Define Survey Goals	-^- 14
	Owner: Michelle Kofler Priority: High Due date: 01/17 ID: 4 Status: 0 % Completed	
	Crestor: Shiri Huberman-Lamm (0% ago) Less	
	Add Comment 15 %	
	25 % 30 % Created Item - Assigned to Mich 35 %	4:29 PM (Two hours ago)
done		

. To access the status field for update, open

Define Survey Go	als	
Owner: Michelle Kofler	Priority: High	Due date: 01/17
	More	

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

Forward Task 📫 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.

VIE	w totonal video		,
Assign to	Shiri Hub × * Cance		
	٩		
Email	Michelle Kofler		
	Rob Green	Project	
Comment	Shiri Huberman-	Project	Ŧ
	Lamm	Priority	
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· ·		At La Add	Files
	Dees Eil		
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Shir	i Huberman-Lamm	11 Jan (3 Da	ys ago)
Crei	ateu item - Assigned to Shiri Hu	erman-Lamm	
Те	m.Do Trans Construction Company is Laconse	and the second s	
		8	A 1
Sa	Cancel	0	-14° 1

Returning task to the previous owner: Click the

Return Task

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

Team.Do 😼	Company Productive Solutions 💌 Edit Company			
-	Projects Tasks Gantt Contacts More Admin			
Help	Search > Filer			
Restrict access to project	JOILA CHARMINE MOLEA			1-4 of 4
Sync to Outlook	Task	Due date	Assigned to Priority	Project
STILL OF OURSEN	🖹 🖒 Social Media Campaign - Autumn Survey Results 😂 📖	1 Feb	Shiri Huberman-La High	Social Media
Sync to Google	C Define Survey Goals Need to define upcoming winter survey goals. Please send for review before you leave for your vacation. Once approved we'll need to create relevant actio	17 Jan	Michelle Kofler High	
	🗐 👷 Welcome to Team.Do Thank you for choosing Team.Do		Shiri Huberman-La	
	🖹 🚊 View tutorial video	11 Jan	Shiri Huberman-Le	

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

Team.Do 👑	Project Social Media 💌 in Productive Solutions Edit Project					
_	Projects Tasks Gantt Contacts More Admin					
	Search Filter					
Help	• •					1 - 1 of 1
Sync to Outlook	Task G ☆ Social Media Campaign - Autumn Survey Results	L8 cm	Due date 1 Feb	Assigned to Shiri Huberman-Li	Priority & High	Project Social Media
Sync to Google						1 - 1 of 1



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

Projects	Tasks	Gantt	Contacts	More	Admin	
Search	Filter					
Priority	Status	Creator	Assign	ied to	Admin	
Priority Show All	Status ▼ Show All	Creator Show All	Assign	aed to All ▼	Admin Show all tasks ▼	

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

Social Media Campa	ign - Autumn Survey	Results	ts						Ŀ: e	1 Feb	Shiri Huberman-L	Le High	Social Media
Define Survey Goals	Need to define upcomi	ng winter	er survey goals. Please	send for review b	pefore you leave for yo	our vacation. Once	e approved we'll ne	eed to create relev	vant actio	17 Jan	Michelle Kofler	High	
☆ Welcome to Team.D	O Thank you for choosing the second secon	ng Team.C	.Do								Shiri Huberman-L	Le	
							Search	► Sort ▼	Filter New Task	More v	C		
o levels sor	ting can I	be c	done on	the se	ettings n	nenu:	Ta □ ☆ So □ ☆ Do	ask ocial Media Ca lefine Survey G	ampaign - Autun Goals Need to de	Search X Export Print Settings	5 4 Withder Sourvey gooding. F	Pl	
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b levels sort	ID Update Start Due date		done on	the se	ettings m	nenu:		ask ocial Media Ca lefine Survey G <u>Rows in</u> <u>Sort 1:</u> <u>Sort 2 (</u>	ampaign - Autun Soals Need to de <u>n page:</u> (internal) <u>:</u>	Search Search Print Settings 50	V Update V Status A	Pk	2 de Groups

- 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.