Task Management

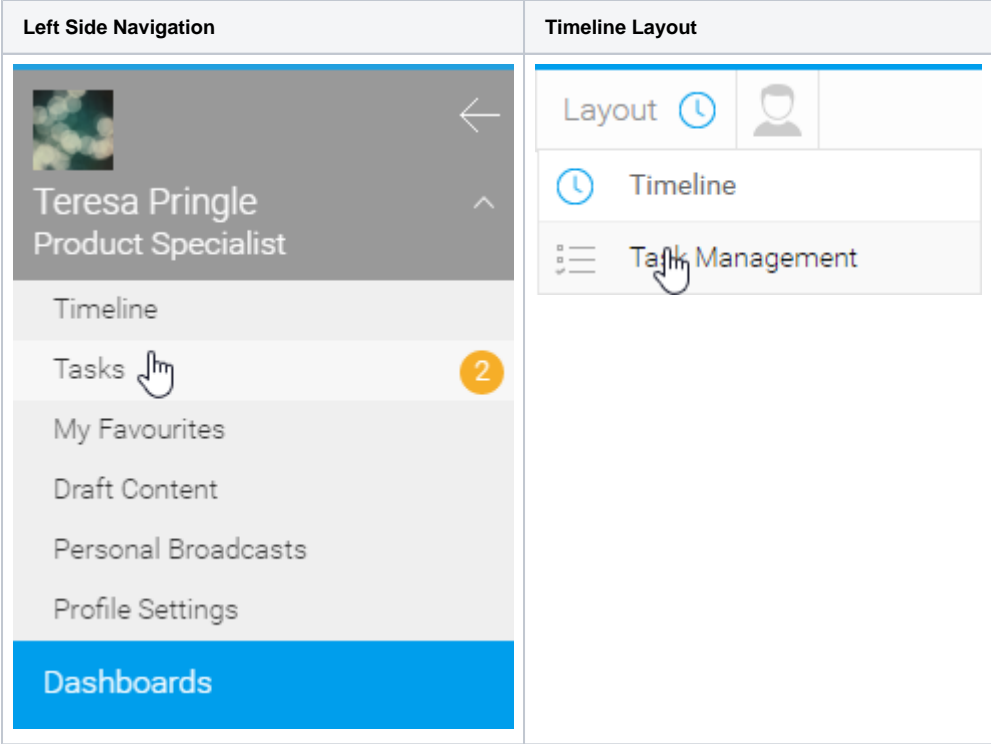## Overview

top

Tasks can be created and assigned to users for a variety of functions, covering simple 'to do' notes all the way through to data quality checks and content change requests. Each user then has the ability to manage both tasks they've requested, and tasks assigned to them, through their Timeline. Alternatively, you may access the Task Management list through a Discussion Streams.

> See *Comments, Tasks, and Decisions* for more information.

Accessing Tasks

In order to assess and complete your tasks you'll need to access the Task Management page. To do this, open the **Tasks** list through the **Left Side Navigation** or change the layout of your **Timeline** to the **Task Management** view. If you want to see a **Discussion Stream's** tasks, change the layout of your stream to the **Task Management** view.

Left Side Navigation	Timeline Layout

You will now be able to see your task list.

Task Controls

Once on the Task Management page, you'll be able to view all of the tasks you're associated with. Using the options to the left of the task list, you will be able to restrict the tasks your viewing using the following options.

Option	Description
Due	This allows the user to view tasks by their due date, within one of the following ranges: ○ Today ○ Next 7 days ○ Next 30 days ○ All time

New	This allows the user to view tasks by their creation date, within one of the following ranges:
	
	   ○ Today
	   ○ Last 7 days
	   ○ Last 30 days
	   ○ All time

Updated	This allows the user to view tasks by their last update date, within one of the following ranges:
	
	   ○ Today
	   ○ Last 7 days
	   ○ Last 30 days
	   ○ All time

Assigned	This allows users to view tasks based on their association with them:
	
	   ○ Assigned to me
	   ○ My Requests

Filtering Tasks

In order to quickly locate a specific task, there a range of filter options you can use.

Option	Description
Search	This search allows the user to narrow down the events they see in their feed, in order to locate specific posts or pieces of content.

Sort	This option allows the users to specify which column the task list is sorted by:
	
	   ○ Due
	   ○ Type
	   ○ Status
	   ○ Priority
	   ○ Assigned To
	   ○ Requestor
	   ○ Stream

Priority	This option allows the user to specify the tasks they see based on the priority assigned to them:
	
	   ○ All
	   ○ Low
	   ○ Medium
	   ○ High

Status	This option allows the user to specify the tasks they see based on their current status:
	
	   ○ All
	   ○ Assigned
	   ○ In Progress / Discussion Stream
	   ○ Review / Proposal
	   ○ Complete
	   ○ Rejected

Favourite Flag	This option allows the user to restrict the items they are seeing just to ones they have marked as favourite or "flagged".
Reset	This option allows the user to clear all the above items, resetting their timeline feed to show everything.
Layout	This option allows the user to specify which layout they look at on the page. They will be on the Timeline layout to see their event feed.

Connections	This option opens the Connections panel on the right of the screen, allowing the user to explore people they are connected to in the system and to establish new connections.