

Task Management

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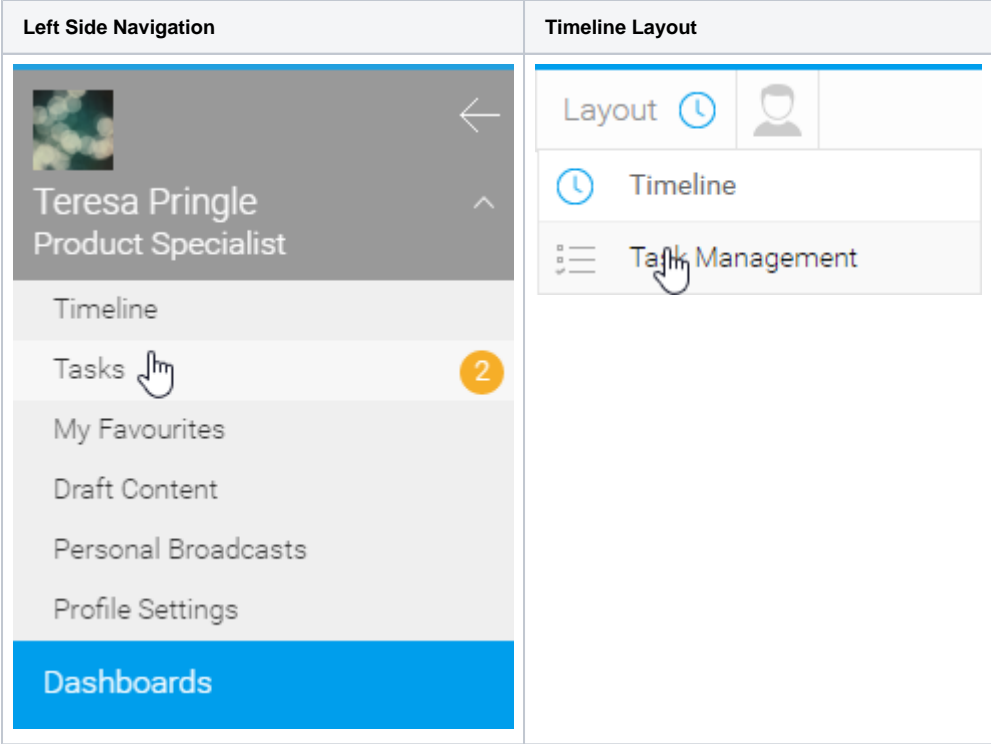
Overview

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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.



You will now be able to see your task list.

Search Timeline

Sort

Priority

Status

Layout

Teresa Pringle

Due

New

Updated

Today

Next 7 Days

Next 30 Days

All time

Assigned

Assigned to me

My Requests

Last 30 Days

Please add the revised Sales Forecast re...

Change Request

Assigned

Jessica Flower

Analysis

Me

Review the beginner training course.

To Do

Complete

Violet Southgate

Training Planning

Me

Review the content training (pt1)

To Do

In Progress

Sammy Jones

Training Planning

Me

Review the content training (pt2)

To Do

Review

Sammy Jones

Training Planning

Me

Review the admin training (pt1)

To Do

Assigned

Jessica Flower

Training Planning

Me

Review the admin training (pt2)

To Do

Assigned

Jessica Flower

Training Planning

Me

Review the admin training (pt3)

To Do

Assigned

Jessica Flower

Training Planning

Me

Tomorrow

22/10/2016

Please review this report with the training..

To Do

Assigned

Jessica Flower


Camp Country P..

Me

Task Controls

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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.



Teresa Pringle

Due

New

Updated

Today

Next 7 Days

Next 30 Days

All time

Assigned

Assigned to me

My Requests

Option	Description
Due	<p>This allows the user to view tasks by their due date, within one of the following ranges:</p> <ul style="list-style-type: none"> ○ Today ○ Next 7 days ○ Next 30 days ○ All time

New	<p>This allows the user to view tasks by their creation date, within one of the following ranges:</p> <ul style="list-style-type: none"> ◦ Today ◦ Last 7 days ◦ Last 30 days ◦ All time
Updated	<p>This allows the user to view tasks by their last update date, within one of the following ranges:</p> <ul style="list-style-type: none"> ◦ Today ◦ Last 7 days ◦ Last 30 days ◦ All time
Assigned	<p>This allows users to view tasks based on their association with them:</p> <ul style="list-style-type: none"> ◦ Assigned to me ◦ My Requests

Filtering Tasks

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

	<input type="text" value="Search Timeline"/>		Sort	Priority	Status			Layout 	
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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	<p>This option allows the users to specify which column the task list is sorted by:</p> <ul style="list-style-type: none"> ◦ Due ◦ Type ◦ Status ◦ Priority ◦ Assigned To ◦ Requestor ◦ Stream
Priority	<p>This option allows the user to specify the tasks they see based on the priority assigned to them:</p> <ul style="list-style-type: none"> ◦ All ◦ Low ◦ Medium ◦ High
Status	<p>This option allows the user to specify the tasks they see based on their current status:</p> <ul style="list-style-type: none"> ◦ 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.
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