Dynamics

DY102.2.1 - Tasks

This document will comprehensively cover the essential steps involved in setting up a task in Dynamics. We will explore the fields and available options both prior to and following the task's saving process.

Creating a Task

When creating a task, you'll encounter specific fields, some of which are mandatory, while others are optional. Mandatory fields are denoted by an asterisk (*), and it's crucial to fill them out before you can save the task.

Subject*

The "Subject" serves as the title of the task. Notably, it's the sole text visible on the My Activities page, making it crucial to choose a title that accurately represents the task you're creating.

Category*

The "Category" field offers a dropdown menu with various options to specify the nature of the task. You have the flexibility to select more than one category if they apply, but it's essential to choose at least one category before you can save the task.

LO Position

The "LO Position" field enables you to associate a task with a Linked Contact within an Organisation.
In this context, it represents the role or position of that contact, such as "DofE Manager.

Start Date

The "Start Date" field is a date picker that allows you to specify when the task will commence.

Description

The "Description" field is a free-text area designated for providing a detailed narrative of your task. This is where you should enter the majority of the text that describes the task in depth.

Due

The "Due" field is a date picker that allows you to specify the deadline by which the task must be completed.

Regarding

This field connects the task to an Organisation. If left empty, the task won't appear on any timeline; when created via the timeline, the organisation's name auto-fills here.

Duration

The "Duration" field is a dropdown menu where you specify your estimate of how long the task will take to complete.

The Top Bar Before Saving

Before saving, this is what you can do with the top bar.

Back

Selecting "Back" will navigate you to the previous screen without saving any changes.

Pop Out

Clicking "Pop Out" will open the current activity in a separate window. This feature is handy when you need to reference information for the activity from other areas within Dynamics.

Save

Selecting "Save" will save any modifications you've made to the activity and keep the window open, allowing you to make additional changes if needed.

Mark Complete

Clicking "Mark Complete" will not only designate the activity as complete but also render it as read-only.
Furthermore, any changes you've made will be saved.

Save and Close

Opting for "Save and Close" will save the activity and return you to the previous screen.

Header

Within the header of the task, you'll find some slightly hidden options for managing your task.

To make changes to these options, simply click on the down arrow located to the right of your name.

Priority

The Priority setting determines the level of importance assigned to this task. By default, it is set to "Normal." To adjust the priority, simply click on "Normal," and you can choose a different priority level.

Owner

The Owner is the individual responsible for managing the task. You can change the owner by hovering over their name and clicking the 'X'. Then, type in the name of the new owner to make the change.

After Saving

Once the task is saved, you'll notice additional options on the top bar. In this section, we'll focus exclusively on these new options, while the previous ones remain unchanged.

Open Record Set

This feature enables you to view all your activities and swiftly switch between them for efficient navigation.

Refresh

Clicking "Refresh" updates the task in case someone else is working on it and saves changes while you have the task open, ensuring you have the latest information.

Close Task

The "Close Task" function operates similarly to "Mark Complete," marking the activity as complete and rendering it read-only. Additionally, you have the choice to mark the task as cancelled using this option.

Delete

Exercise caution with this option, as it should be rarely used. Selecting "Delete" will permanently remove the task. It's typically employed when a task has been created in error and needs to be completely removed from the system.

Assign

The "Assign" option enables you to reassign the ownership of the task to another individual. Please note that when you change the owner, the task will be removed from your 'My Activities' page.

Share

The "Share" option provides you with the ability to share the task with a colleague either via email or by generating a shareable link. Importantly, this action does not alter the ownership of the task.

Do not use any of the other options on the top menu.

Task: Practice

Please take some time to explore and use all the options mentioned above to become familiar with the task creation process.
Rest assured, while you're in the testing site (identified by the orange banner at the top), there's no risk of causing any unintended changes or issues.

For further Dynamics guides, make sure to check out the Digital Systems page on the hub.

This page can also be used to access an array of other learning material.

For further help, reach out to systemstraining@dofe.org