

Task Management (Pro)

(User Manual)



By
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Introduction

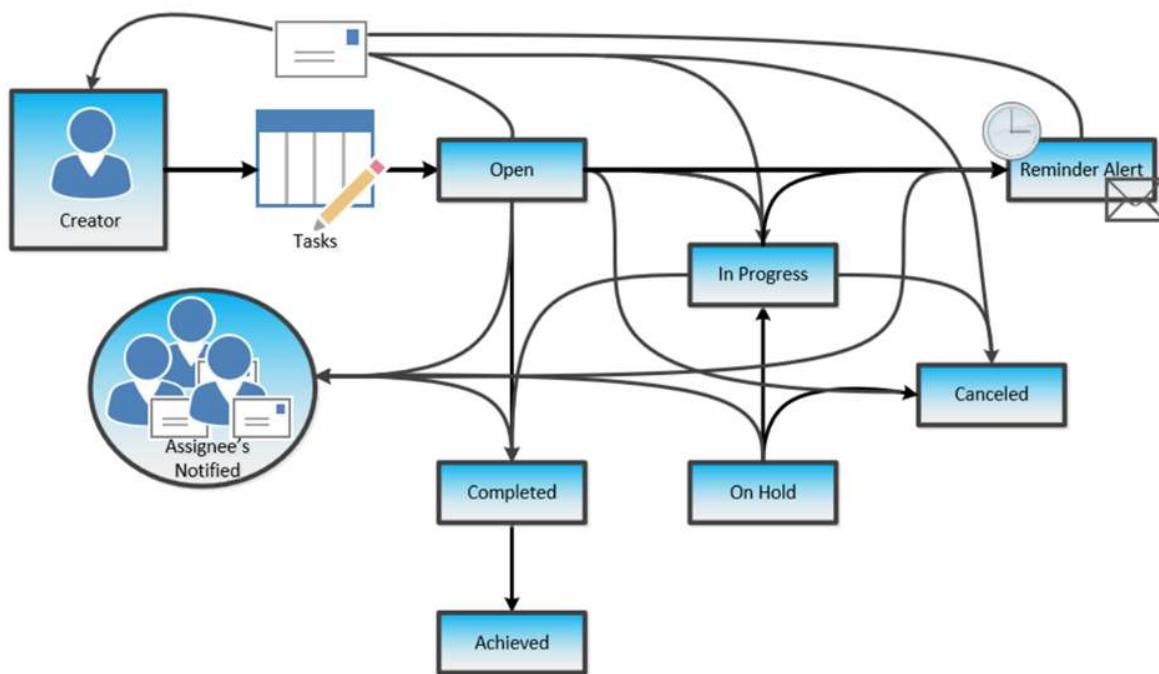
The introduction section of the document describes the scope and objective of Office 365 Chronodat Action Item and Task Management Add-in.

Scope & Objective

Chronodat Action Item and Task Management Add-In provides a seamless integration of Task Management features, using Office 365 SharePoint Online. The impact of the add-in can be realized via the all-round features and user friendly interfaces it provides.

The primary objective of Chronodat Action Item and Task Management add-in is to create an Action Item or Task, and track it to its end resolution. For example, creating a task & assigning it to a team member to be worked > working on it > resolving it > then closing it. This task management process is what's known as a workflow. If your team is Scrum or Agile-based, the design of Chronodat Action Item and Task Management adds-in will be very familiar to you.

Chronodat Task Management (Pro) Process Workflow



Add-in Overview

Office 365 Action Item and Task Management is a pure SharePoint features wrapped up into an awesome device friendly add-in. Using this add-in your project team can quickly visualize existing tasks by priority, category or age to understand current and overdue tasks.

Home Page

The screenshot shows the Task Management (Pro) Global Dashboard. At the top, there's a navigation bar with the 'Task Tracker' logo, a 'Create new Task' button, and a user profile 'Hello, Anuradha Edla'. Below the navigation is a 'Task Management (Pro)' header and a 'Task Dashboard' section. The dashboard includes four summary cards: 'All Tasks' (8), 'Incomplete' (6), 'Overdue' (2), and 'Due Today' (2). To the right is a 'Task Statistics' section featuring a donut chart labeled '4 Open Tasks' and a table showing task status distribution: Open (4), In Progress (1), Completed (2), On Hold (1), Canceled (0), Active (75%), and Closed (25%). The main area displays a table of latest tasks with columns for Print/Edit/Delete, Task ID, Title, Priority, Task Status, Due Date, and Modified. The table lists five tasks:

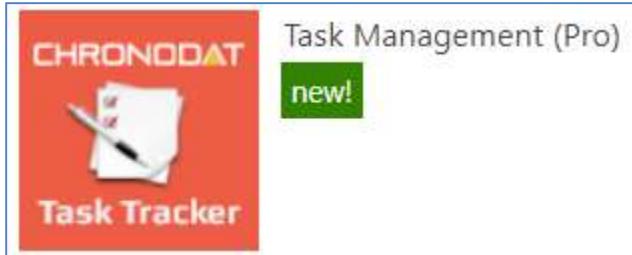
Print/Edit/Delete	Task ID	Title	Priority	Task Status	Due Date	Modified
	#TASK6	Create new SharePoint document library add-In testing team.		On Hold	10/5/2018	
	#TASK8	Create new Azure AD groups		Open	9/27/2018	
	#TASK7	Increase AZURE Web App database size		Open	9/30/2018	
	#TASK5	Deploy Finance application database upgrade		Open	10/3/2018	
	#TASK4	Create new AZURE function for HR database		Open	9/30/2018	

Features:

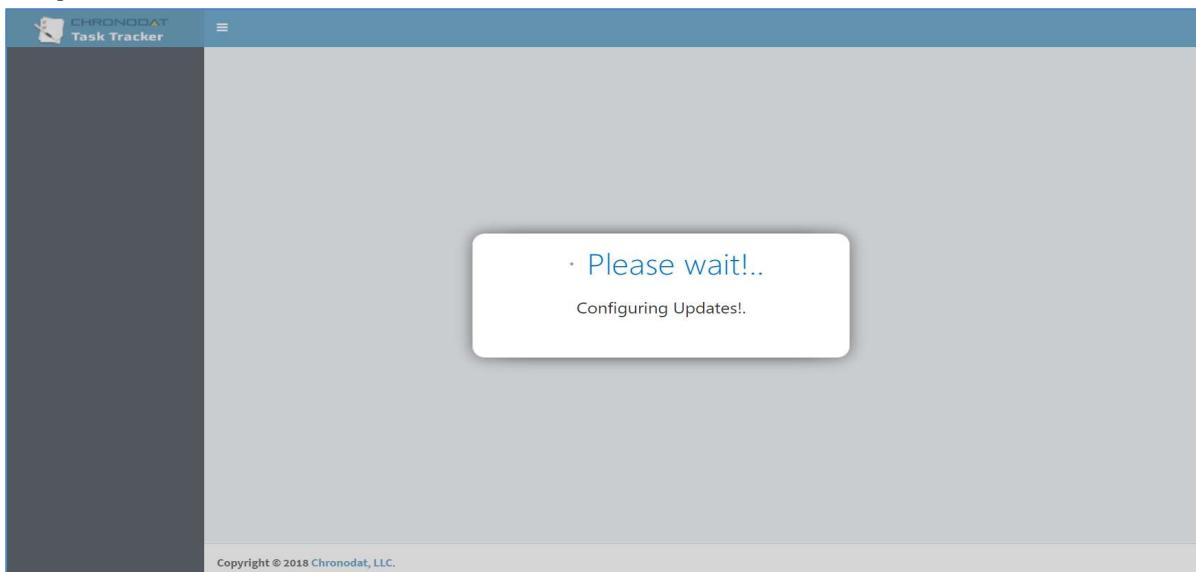
- Provides color-coded, built-in dashboards for quick metrics & reporting, with no configuration needed; there is a **Dashboard** for all Tasks, you see:
 - 10 most recently updated Tasks, by **Assigned To Me, Incomplete, Overdue, Due Today, Due This Week, Completed**
 - Task Status **pie chart** by Status and Active vs. Closed)
 - Task Status **bar chart**, based on Priority
- Provide you a view of tasks which displays tasks into different categories:
 - All Tasks
 - Incomplete (Open + In Progress + On Hold)
 - Overdue
 - Due Today
 - Due This Week
- Add-in provides a links to open the tasks to View/Edit/Delete them directly in all Views
- Task can be created using a pre-defined Task prefix example: “#Task-2017-”.
- Pre-defined **Task Categories** (such as Hardware, Software, etc.), & **Task Sub-Categories** (such as broken monitor, need Microsoft Office installed, etc.), *all configurable according to your business*
- Setup for designating Team Contact for specific Sub-Category. If a Task is created with a Sub-Category, it will automatically be assigned to that person/person(s), and he or she will receive an email notification (along with the user) when a new Task is submitted.
- Pre-written Email Templates for notifications sent to the user, *again, configurable according to your business*
- Powerful Search engine to find Tasks quickly & easily
- Export options, such as Excel, PDF, CSV, and more
- Security is built-in, and user access is very customizable.

Add-in Configuration

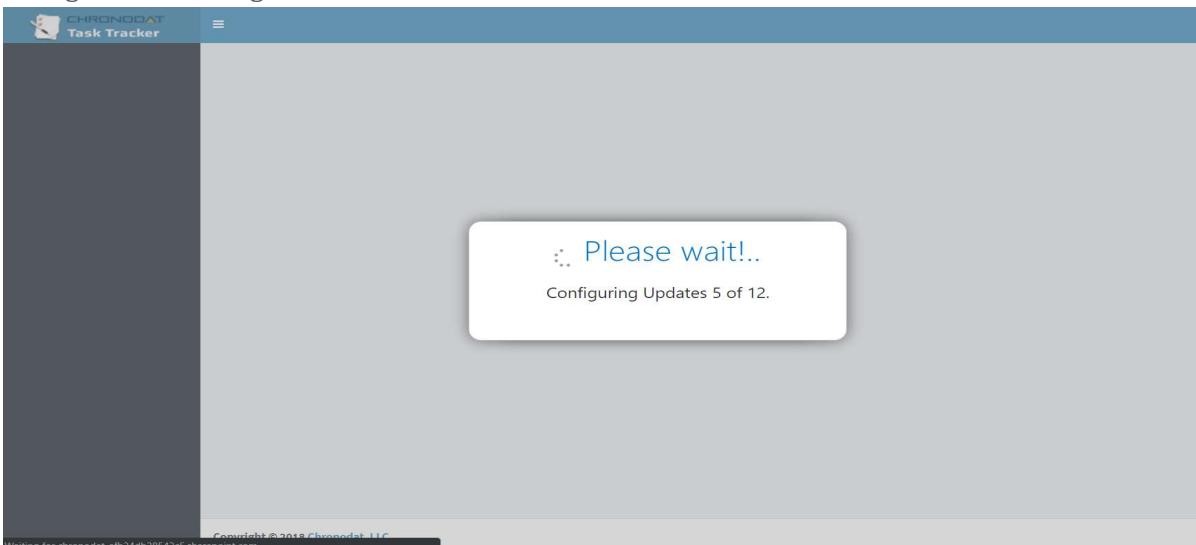
1. Click Task Management (Pro).



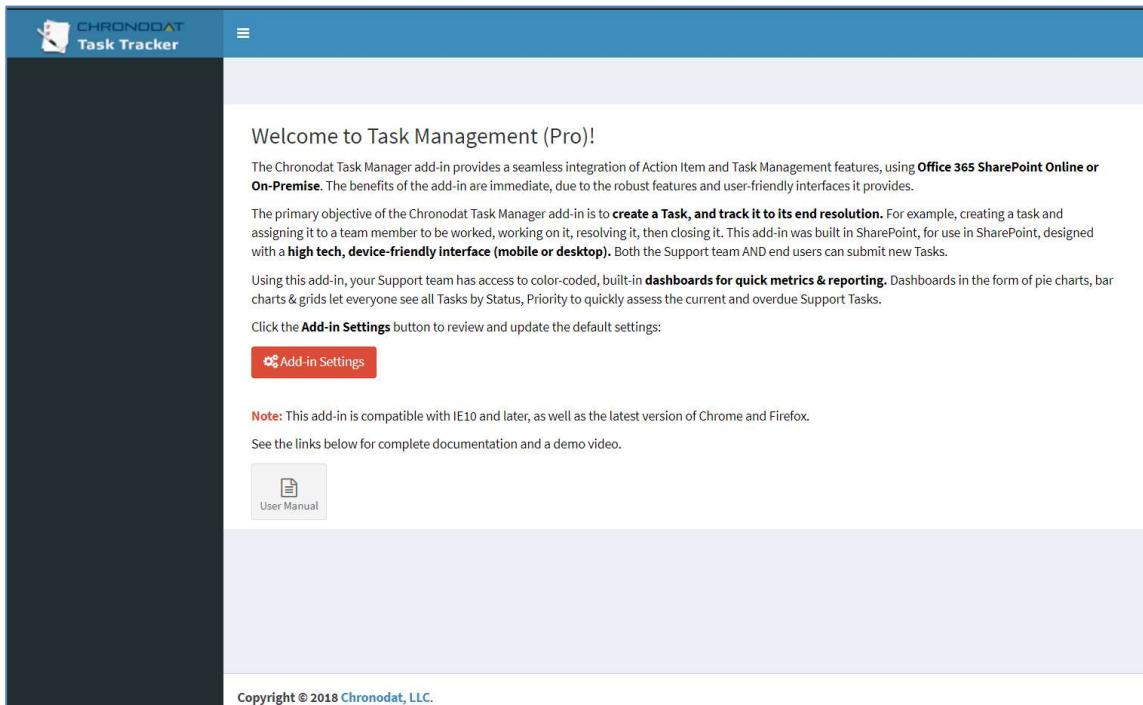
2. On the initial run, add-in setups the default settings. Please wait until configuration is complete.



3. Typically, it would take around 30 seconds to 1 minute to complete the default configuration settings.



4. Click the red button to review the Add-in Settings.



5. On the **General** tab, enter the name you want for your Task Management add-in (it will display on screens such as the Dashboard) and Task ID Prefix.

Add-in Settings Manage settings

Click each tab below, and review the General and Email Notification specifications.

Available fields for each 'Notification' tab:
TaskID, Title, LinkTitle, Taskstatus, Priority, AssignedTo, TaskCategory, TasksubCategory, CreatedBy, Created, ModifiedBy, Modified.

General	Open Email Notification	In Progress Email Notification	Completed Email Notification	OnHold Email Notification	Assigned To Email Notification	Alert Before Due Date
Alert After Due Date						
App Name: *	Chronodat Task Management (Pro)					
Ticket ID (Prefix): *	#					
Request Edit/Display Form Tabs: *	[{"General": ["TaskID", "Title", "TaskDescription", "Priority", "Attachments"], "Details": [{"TaskCategory": "TasksubCategory", "TaskDueDate": "PercentComplete"}], "Status & Comments": [{"Taskstatus": "AssignedTo", "RelatedTasks": "RequestComment"}, {"Alert Settings": [{"AlertNotification": "PersonNotify"}]}]]					
Request New Form Fields: *	[{"General": ["Title", "TaskDescription", "Priority", "TaskDueDate", "TaskCategory", "TasksubCategory", "Attachments"]}]					
Add-in Logo URL: (Width: 165px; Height: 54px) *	./Images/logo.png					

6. Change logo and Color Scheme.

Request Edit/Display Form Tabs: *
[["General", "TaskID", "Title", "TaskDescription", "Priority", "Attachments"], ["Details", "TaskCategory", "TasksubCategory", "TaskDueDate", "PercentComplete"], ["Status & Comments", "Taskstatus", "AssignedTo", "RelatedTasks", "RequestComment"], ["Alert Settings", "AlertNotification", "PersonsToNotify"]]

Request New Form Fields: *
[["General", "Title", "TaskDescription", "Priority", "TaskDueDate", "TaskCategory", "TasksubCategory", "Attachments"]]

Add-in Logo URL:
(Width: 165px; Height: 54px) *
./Images/logo.png

Add-in Mini Logo URL:
(Width: 40px; Height: 54px) *
./Images/minilogos.png

Color Scheme:
(Base Color Scheme - Blue) *
Blue
Blue (selected)
Red
Yellow
Green
Purple
Light Blue
Light Red
Light Yellow
Light Green
Light Purple

ALL tabs reviewed

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7. Click the next tab in sequence. You may be tempted to press **Save**, but you need to finish reviewing all the other tabs. If you do, however, click **Save**, you can always quickly get back to this screen by clicking **Settings > Add-in Settings**. This tab allows you to configure the email that will be sent to the user after submitting a task.

- If you don't want the user to receive an email, just click **Disable**. If you do want the user to receive an email, leave the default.
- The first field is how the **subject line** will display in the email to the user. You can either change the text, or leave the default.
- Notice how the Subject contains {TaskID}. Not only can you use that field, but a host of other fields, which are listed in the blue bar above.
- The next field contains the text in the **body** of the email to the user. Again, use the available fields listed in the blue bar, and configure the text however you like!

General	Open Email Notification	In Progress Email Notification	Completed Email Notification	On Hold Email Notification	Assigned To Email Notification
Enable/Disable Email Notification: *	<input checked="" type="button"/> On				
Email Subject template for Task Confirmation to requestor: *	Task Management - Task {TaskID} has been created.				
Email Body template for Task Confirmation to requestor: *	Confirmation Notification: Task {TaskID} has been created Task Title: {Title} Due Date: {TaskDueDate}				
<input checked="" type="checkbox"/> ALL tabs reviewed					

8. When finished, click the next tab in sequence. This tab is very similar, but it's for the email that the user sees when the Task has moved to **In Progress**.
 - Again, you can turn it off by clicking **Disable**.
 - Configure the subject line in this field. Remember you can use the available fields in the blue bar above.
 - Configure the body of the email in this field.
9. The rest of the tabs function the same way.
 - This tab is for the email sent when the Task has been **Completed**.
 - The last tab is for the email sent to the Chronodat Action Item and Task Management member who will be working the Task.
10. Once you're finished reviewing all the tabs, click the blue button at the bottom. *As mentioned before, you can always go back and make some adjustments if you change your mind! Just click Settings > Add-in Settings.*
11. Now Add-in redirects to Dashboard page (Empty Dashboard).

Status	Count	Percentage
Open	0	
In Progress	0	
Completed	0	
On Hold	0	
Canceled	0	
Active	0%	
Closed	0	

12. Next, you click **Settings > Categories**. This screen is for defining the high-level Categories that your Tasks will be listed under. You can add a new Category by clicking **New Item**, or edit the Categories that are listed by clicking Edit this list.

- **New Item** > I'll enter **Air Conditioning/Heating**, then click **Save**.

- I'll now click **Edit this list**. To make changes, click the ellipses beside an item. I want **Other/General** to say just **Other**, so I'll click the ellipses beside it, **Edit Item**, remove the unwanted text, **Save**, then click **Stop editing this list**.

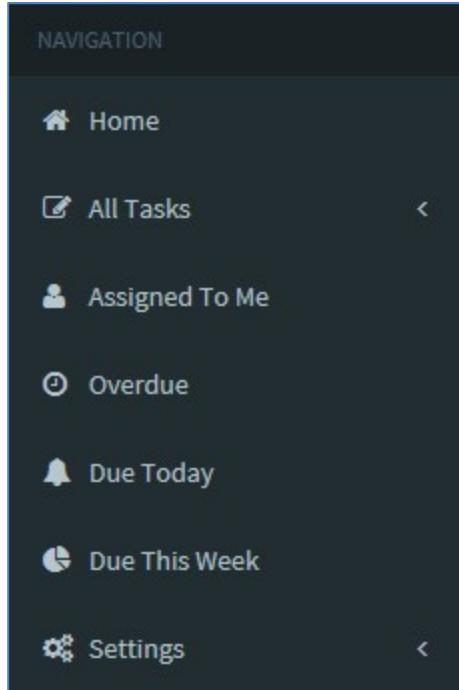
13. Next, you click **Sub-Categories & Team Contacts**. Since we just defined our high-level Categories, now we want to define their Sub-Categories, and designate a Chronodat Action Item and Task Management Support Contact for each.

- Remember we saw **Hardware**, **Software**, etc.? Well, notice how there is **Install Monitor** and **Replace RAM** under **Hardware**. **Install MS Office**, **Re-Image User Machine** under **Software**. You get the idea.
- You make changes the same way – you click **New Item** or **Edit this list**.
- Beside each item, you need to designate a default **Support Contact** so that anytime a Task is put in under this Category & Sub-Category, it will automatically be assigned to that person, and he or she will receive an email notification (along with the user) when a new Task is submitted.

Navigation

General Navigation

Navigation options are found in the left margin.

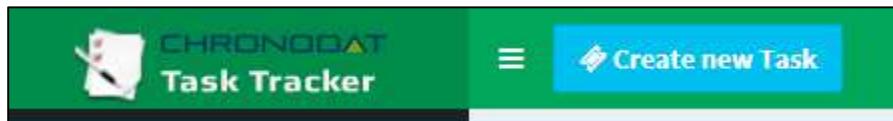


Navigating to the Dashboard

You can click the **Home** (house) icon at the top right, the **Chronodat Action Item and Task Management** icon at the top left, or **Home** in the left navigation to go to the Dashboard. All 3 methods take you to the same place.

Hiding the Left Navigation

You can click the 'bar' icon at the top left (next to **Create new Task**) to hide the left navigation, thus widening the information on the page that is currently displayed.



Creating a New Task

Now that we've covered the basic navigation, let's create a Task. Click the **Create New Task** button at the top left. Complete the fields (required fields are indicated by a red asterisk), then click **Submit**.

The screenshot shows the 'New Task' dialog box with the following interface elements:

- Toolbar:** Includes Save, Cancel, Paste, Cut, Copy, Clipboard, Actions, and Spelling buttons.
- Priority Bar:** Shows 'Priority: (2) Medium' with an information icon.
- Title:** A required field labeled 'Title *' with an empty input box.
- Description:** An optional field labeled 'Description' with an empty input box.
- Priority:** A dropdown menu set to '(2) Medium'.
- Due Date:** A date picker input field.
- Task Category:** A dropdown menu set to 'Hardware'.
- Task Sub-Category:** A dropdown menu with several options listed.

Assigning a Task

- Tasks are automatically assigned to the Team Contact defined in the Sub-Categories list.
- You can, however, *manually* assign a different Team Contact to the Task.
- If a Tam Contact is not defined, the Task will be assigned to the user who creates the Task.

Open the Task by clicking on the **Task ID**. Click **Edit Item**, then enter a Chronodat Action Item and Task Management member under **Assigned To** (just start typing the first few letters of the last name), then click **Save**.

Requester and Team Contact receives email notifications.

Task Tracker - Task #TASK1 has been created.



Task Management (Pro)

Today, 11:56 AM
Veera K ▾

Confirmation Notification:
Task #TASK1 has been created

Task Title: Install MS Office Software
Due Date: 10/1/2018
Created By: Veera K
Summary:

Install MS Office Software

Status: Open
Category: Software
Priority: (2) Medium

To view the task details:
[Install MS Office Software](#)

Task Tracker - Task #TASK9 has been assigned to you



Task Management (Pro) <no-reply@sharepointonline.com>
Today, 12:31 PM
Anuradha Edla ▾

Assigned To Notification:
Task #TASK9 has been assigned to you.

Task Title: Install new monitor in Building 4 Cusbe #325
Due Date: 10/3/2018
Created By: Anuradha Edla
Summary:

Install new monitor in Building 4 Cusbe #325.
• HP 21" Monitor.

Status: In Progress
Category: Hardware
Priority: (2) Medium

To view the task details:
[Install new monitor in Building 4 Cusbe #325](#)

Dashboards

We understand the **importance of reporting**, so forget your Excel spreadsheets and the manual work of chasing down the Tasks. The Dashboards will give you your reporting statistics.

Click **Home**. The Statuses are listed horizontally above. **Incomplete, Overdue and Due Today** shows rollup items in **Open, In Progress and On Hold state**.

The screenshot displays the 'Task Management (Pro)' Global Dashboard. At the top, there are four summary boxes: 'All Tasks' (8), 'Incomplete' (6), 'Overdue' (2), and 'Due Today' (2). Below these is a section titled 'Latest Tasks' with tabs for 'Assigned To[Me] (0)', 'Incomplete (6)', 'Overdue (2)', 'Due Today (2)', 'Due This Week (4)', and 'Completed (2)'. The 'Incomplete (6)' tab is selected, showing a list of six tasks. Each task row includes columns for 'Print/Edit/Delete', 'Task ID', 'Title', 'Priority', 'Task Status', 'Due Date', and 'Modified'. The tasks are:

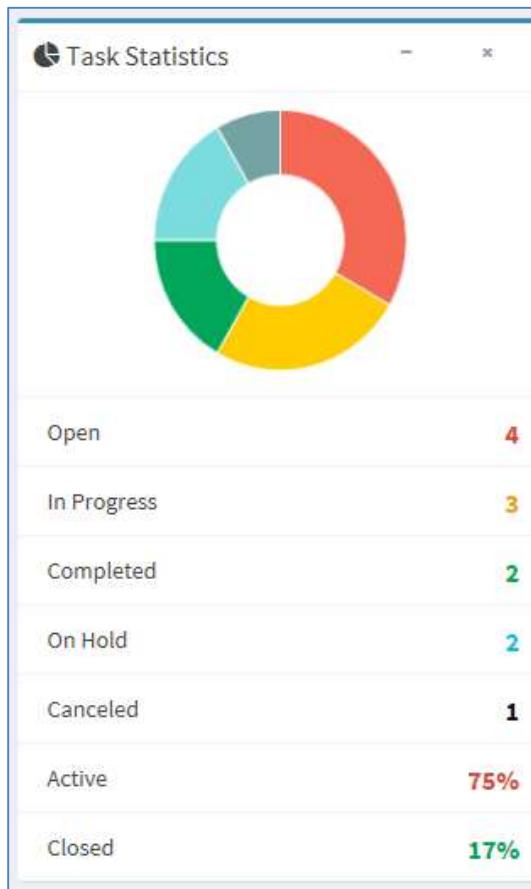
Print/Edit/Delete	Task ID	Title	Priority	Task Status	Due Date	Modified
	#TASK6	Create new SharePoint document library add-In testing team.		On Hold	10/5/2018	
	#TASK8	Create new Azure AD groups		Open	9/27/2018	
	#TASK7	Increase AZURE Web App database size		Open	9/30/2018	
	#TASK5	Deploy Finance application database upgrade		Open	10/3/2018	
	#TASK4	Create new AZURE function for HR database		Open	9/30/2018	

To the right, a 'Task Statistics' section features a donut chart with a black center circle labeled '4 Open Tasks'. The chart segments are red (Overdue), yellow (In Progress), green (Open), and blue (Completed). Below the chart is a table showing the count of tasks for each status:

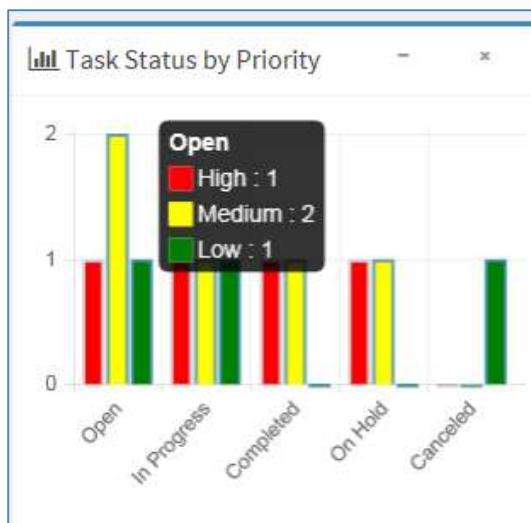
Status	Count
Open	4
In Progress	1
Completed	2
On Hold	1
Canceled	0
Active	75%
Closed	25%

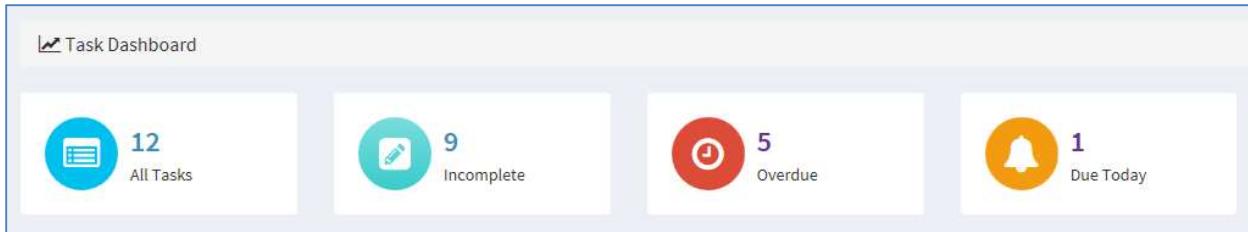
The large boxes on the top match the tabs below it. Scroll through the tabs to see the respective Tasks for each Status. The list contains the latest **10 Tasks** for each Status.

Notice the **pie chart** on the right, which gives you a visual of the **Status** and **Active vs. Closed** Tasks, and quickly lets you see that there are a lot more Tasks that are **Active** than **Closed**.



The **bar chart** gives you a quick assessment by **Priority** for each Status. Red indicates High, Yellow is Medium, and Green is Low priority. So for the Open status, 4 tickets are **High** priority. For **In Progress**, 3 are Low priority, and so on.





The list of Tasks in the middle is the latest **10 Tasks**. If you want to view **ALL Tasks** under a particular Status, click **View All** below it.

Assigned To[Me] (0) Incomplete (6) Overdue (2) Due Today (2) Due This Week (4) Completed (2)						
Print/Edit/Delete	Task ID	Title	Priority	Task Status	Due Date	Modified
	#TASK6	Create new SharePoint document library add-in testing team.	...	On Hold	10/5/2018	About a minute ago
	#TASK8	Create new Azure AD groups	...	Open	9/27/2018	5 minutes ago Overdue
	#TASK7	Increase AZURE Web App database size	...	Open	9/30/2018	14 minutes ago Due Today
	#TASK5	Deploy Finance application database upgrade	...	Open	10/3/2018	16 minutes ago
	#TASK4	Create new AZURE function for HR database	...	Open	9/30/2018	17 minutes ago Due Today

The page that displays shows all Tasks for this Status in a grid layout, sorted by **Modified Date**. Notice the same **Export** options at the top left that we just saw, which shows the consistency in the add-in. There is also a **Search** box at the top right, plus buttons at the bottom right for paging forward and backward.

Tasks - Open Manage Tasks								
Show 10 rows	Copy	CSV	Excel	PDF	Print	Search:		
Print/Edit/Delete	Task ID	Title	Priority	Task Status	Task Category	Due Date	Assigned To	Modified
	#TASK8	Create new Azure AD groups	...	Open	Hardware	9/27/2018 Overdue	Unassigned	18 minutes ago
	#TASK7	Increase AZURE Web App database size	...	Open	Hardware	9/30/2018 Due Today	Unassigned	28 minutes ago
	#TASK5	Deploy Finance application database upgrade	...	Open	Hardware	10/3/2018	Unassigned	29 minutes ago
	#TASK4	Create new AZURE function for HR database	...	Open	Hardware	9/30/2018 Due Today	Unassigned	30 minutes ago

Showing 1 to 4 of 4 entries

Previous 1 Next

Notice the buttons at the top left. These are for exporting the grid.

- **Copy** copies the table to the Clipboard.

- **CSV** means comma-separated values, and is just the raw, unformatted data
- **Excel** puts the grid in an Excel file, so that you can take advantage of the filtering, and formatting features that Excel provides
- **PDF** exports the grid as a PDF file, and **Print** is for printing the grid

You can change how many rows of data display by clicking the button at the top left. The default is **10**, but you can select **25, 50, or All**.

An **Edit** icon is located to the left of each Task, which opens a form for the Task, already in **Edit** mode. The **Delete** icon deletes the Task, right from this screen.

Print/Edit/Delete	Task ID	Title	Priority	Task Status	Task Category	Due Date	Assigned To	Modified
	#TASK8	Create new Azure AD groups		Open	Hardware	9/27/2018 	Unassigned	
	#TASK7	Increase AZURE Web App database size		Open	Hardware	9/30/2018 	Unassigned	

Tasks - SharePoint 2013 content database size for...

VIEW

Edit Item Version History Shared With Delete Item Manage Alert Me Workflows

Actions

General Details Status & Comments Alert Settings

Task ID: #1

Title: SharePoint 2013 content database size for single site collection

Description:

We have a web application with single site collection and one document library, mainly used for uploading supporting business documents (.pdf, .doc and .xml). Current content DB size is 160 GB with daily increase of 2 GB reaching closer to set 200 GB limitation set by Microsoft best practices. I read on blogs if the site is solely used for Records Center content DB size can go up to 1 TB.

Does 1 TB rule apply to our site collection? Anything we have to know or do to avoid any disaster?

Priority: (2) Medium

Attachments

If you click **Task ID**, it takes you to the same form, but you're in **View** mode. You can, however, click **Edit Item** to make a change.

Comments section in the Task form keeps track of Tasks history logs. Possible to assign task to more than one team member.

The screenshot shows the SharePoint 2013 Task form. At the top, there's a toolbar with Save, Cancel, Paste, Cut, Copy, Delete Item, Attach File, and Spelling buttons. Below the toolbar, tabs include General, Details, Status & Comments (which is selected and highlighted in purple), and Alert Settings. The Status & Comments section contains fields for Task Status (set to Completed), Assigned To (set to Anuradha Edla), and Related Tasks (with a placeholder 'Select Related Tasks...'). The Comments section displays a history of interactions:

- Anuradha Edla 9/30/2018 1:38:03 PM (In Progress)
request assinged.
- Anuradha Edla 9/30/2018 1:38:40 PM (Completed)
The main reason Backup & Recovery (Requirements for backup and restore may not be met by the native SharePoint Server 2013 backup or content databases larger than 200 GB) of site collection, Monitoring & managing the Db. You can go upto 4TB Content database size (all usage scenarios), as you have only one site collection in that db. If you meet the below requirement then you all set for 4TB size. Disk subsystem performance of 0.25 IOPS per GB. 2 IOPS per GB is recommended for optimal performance. You must have developed plans for high availability, disaster recovery, future capacity, and performance testing.

The column headings are sortable. Just click a heading. For example, let's say we want to sort the grid according to **Task Category**, so I'll click that heading. You can refine it further by Ascending or Descending order – just click the icon beside the heading.

Print/Edit/Delete	Task ID	Title	Priority	Task Status	Task Category	Due Date	Assigned To	Modified
-------------------	---------	-------	----------	-------------	---------------	----------	-------------	----------

There is also a handy **Print** icon next to each line for quick printing of an individual Task.

You can search for Tasks with the Search field at the top right. Enter your search criteria here - just start typing – there is no need to click <Enter>. You can search for any text or number, and the Search looks in all columns.

The screenshot shows the SharePoint 2013 Task list view. At the top right, there is a search bar labeled 'Search:' with a magnifying glass icon.

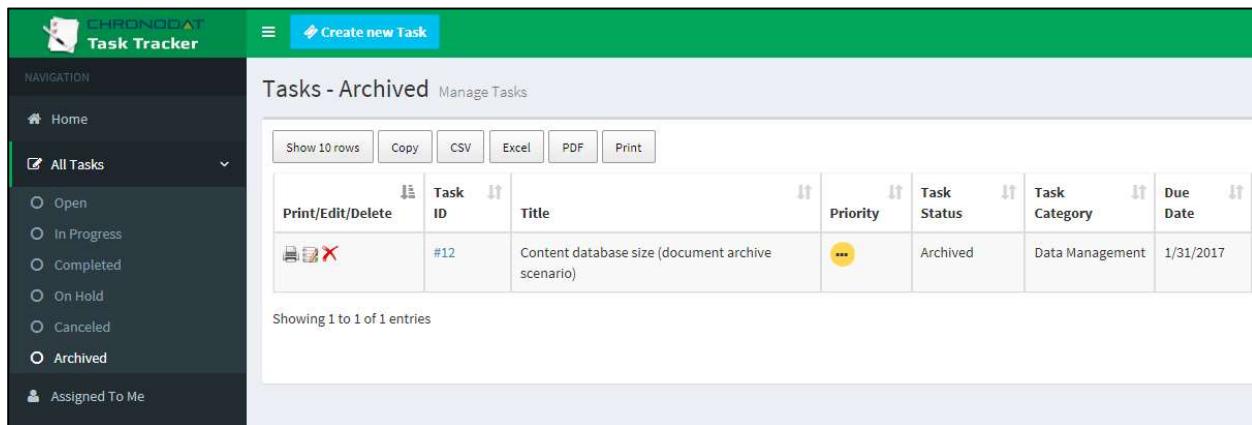
Archiving Tasks

Once a Task has been changed to a Status of **Closed**, it can be archived

An Archived option will become available in the **Task Status** field, but only if the Task is set to **Closed** (for example, you won't see **Archived** option available if the Status is **Completed**).

Change the **Task Status** to **Archived**. Keep in mind, once a ticket is Closed or Archived, it CANNOT be reopened. Only **Completed** tickets can be reopened.

If you want to view the list of Archived Tasks, click **Archived** in the left navigation.



The screenshot shows the Chronodat Task Tracker application. On the left, there's a dark sidebar with a navigation menu. The 'All Tasks' option is selected, indicated by a checked checkbox icon. Other options include Open, In Progress, Completed, On Hold, Canceled, and Archived. Below this is a 'Assigned To Me' section. The main area is titled 'Tasks - Archived' and contains a table with one entry. The table columns are: Print/Edit/Delete, Task ID, Title, Priority, Task Status, Task Category, and Due Date. The single entry shows Task ID #12, Title 'Content database size (document archive scenario)', Priority (yellow circle), Task Status 'Archived', Task Category 'Data Management', and Due Date '1/31/2017'. At the top of the main area, there are buttons for 'Create new Task', 'Copy', 'CSV', 'Excel', 'PDF', and 'Print'. There's also a 'Show 10 rows' dropdown.

Security

The Chronodat Action Item and Task Management add-in contains configurable access levels. Security is maintained by the Admin, who can grant access by:

- Creating a **new Security group**
- Using any **existing SharePoint group** in the Parent site
- Creating access for a View-Only user

With the first 2 groups, the Admin can grant the group "Contribute" access (or higher), as well as Dashboard access. The members can **create Tasks**, **edit/track Tasks**, and view the Dashboard.