









PLATFORM DEEP DIVE / Plugins / Custom Plugins / Task management / using-out-of-office-records

Contents

- PLATFORM DEEP DIVE / Plugins / Custom Plugins / Task management /
Using out of office records

PLATFORM DEEP DIVE / Plugins / Custom Plugins / Task management / Using out of office records

The Out-of-office feature allows you to register users availability to perform a task. It can be allocated manually or automatically.

Out of office					Add out-of-office	
Search by user						
User	Start Date	End Date	Edited at	Edited by		
Jane Smith (jane.sm...	03 Aug 2022	07 Aug 2022	03 Aug 2022, 3:24 PM	John Doe		
Bess Twishes (bess....	03 Aug 2022	31 Dec 2046	03 Aug 2022, 3:16 PM	John Doe		
Gene Eva (gene.eva...	08 Aug 2022	27 Aug 2022	03 Aug 2022, 9:25 AM	John Doe		

! INFO

Users with out-of-office status are excluded from the candidates for automatic task allocation list during the out-of-office period. More information about

allocation rules, here.

Accessing out-of-office records

To add out-of-office records, follow the next steps:

1. Open

The fallback content to display on prerendering

.

2. From the side menu, under **Task Management**, select the **Out office entry**.

The screenshot shows the FLOWX.AI interface. On the left, a sidebar menu under 'Plugins' has 'Task Manager' expanded, with 'Out of office' highlighted. The main area is titled 'Out of office' and includes a search bar and an 'Add out-of-office' button. Below is a table of records:

User	Start Date	End Date	Edited at	Edited by
Jane Smith (jane....	03 Aug 2022	07 Aug 2022	03 Aug 2022, 3:24 PM	John Doe
Bess Twishes (be...	03 Aug 2022	31 Dec 2046	03 Aug 2022, 3:16 PM	John Doe
Gene Eva (gene....	08 Aug 2022	27 Aug 2022	03 Aug 2022, 9:25 AM	John Doe

Adding out-of-office records

To add out-of-office records, follow the next steps:

1. Click **Add out-of-office** button, in the top-right corner.

2. Fill in the following mandatory details:

- Assignee - user single select
- Start Date (! cannot be earlier than tomorrow)
- End Date (! cannot be earlier than tomorrow)

The screenshot shows a web interface with a table titled 'Out of office' in the background. The table has columns for 'User', 'Start date', and 'End date'. The first row shows 'Jane Smith' with a start date of 'Aug 2022, 3:24 PM'. The second row shows 'Bess Twiss' with a start date of 'Aug 2022, 3:16 PM'. The third row shows 'Gene Evans' with a start date of 'Aug 2022, 9:25 AM'. Overlaid on this is a modal window titled 'Add out-of-office'. The modal has a close button (X) in the top right corner. It contains three input fields: 'Add assignee' (a dropdown menu), 'Start date' (a date picker with a calendar icon), and 'End date' (a date picker with a calendar icon). At the bottom of the modal are two buttons: 'Cancel' and 'Save'.

3. Click **Save**.

Editing out-of-office records

To edit out-of-office records, follow the next steps:

1. Click **Edit** button.
2. Modify the dates (**!** cannot be earlier than tomorrow).
3. Click **Save**.

The screenshot shows a web interface for managing out-of-office records. At the top, there is a section titled 'Out of office' with a search bar labeled 'Search by user'. Below this is a table with columns 'User' and 'Out of office'. The table contains three rows: 'Jane Smith' with '11.08.2022 - 15.08.2022, 3:24 PM', 'Bess Twiss' with '11.08.2022 - 15.08.2022, 3:16 PM', and 'Gene Evans' with '11.08.2022 - 15.08.2022, 9:25 AM'. A modal dialog titled 'Edit out-of-office for John Doe' is open, showing fields for 'Start date' (11.08.2022) and 'End date' (28.08.2022), each with a calendar icon. At the bottom of the modal are 'Cancel' and 'Save' buttons.

User	Out of office
Jane Smith	11.08.2022 - 15.08.2022, 3:24 PM
Bess Twiss	11.08.2022 - 15.08.2022, 3:16 PM
Gene Evans	11.08.2022 - 15.08.2022, 9:25 AM

Edit out-of-office for John Doe

Start date

11.08.2022

End date

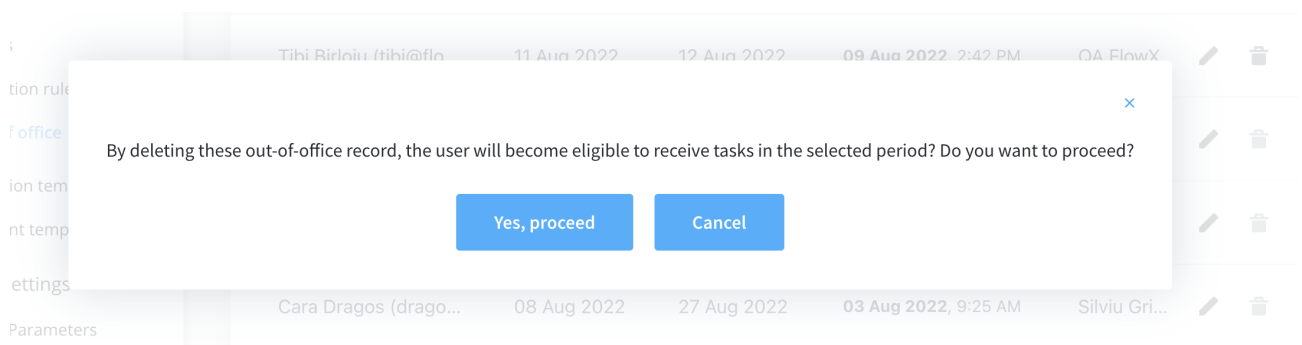
28.08.2022

Cancel Save

Deleting out-of-office records

To delete out-of-office records, follow the next steps:

1. From the **out-of-office list**, select a **record**.
2. Click **Delete** button. A pop-up message will be displayed: *"By deleting this out-of-office record, the user will become eligible to receive tasks in the selected period. Do you want to proceed?"*



DANGER

If you choose to delete an out-of-office record, the user is eligible to receive tasks allocation during the mentioned period. More information about automatic task allocation, [here](#).

3. Click **Yes, proceed** if you want to delete the record, click **Cancel** if you want to abort the deletion.

CAUTION

If the out-of-office period contains days selected in the past, the user cannot delete the record, the following message is displayed: *"You can't delete this record because it already affected allocations in the past. Try to shorten the period, if it didn't end."*

Out of office

Search by user

Add out-of-office

User	Start Date	End Date	Edited at	Edited by	
Jane Smith (jane.s...	03 Aug 2022	07 Aug 2022	03 Aug 2022, 3:24		<div>You can't delete this record because it already affected allocations in the past.</div> <div></div>
Bess Twishes (bes...	03 Aug 2022	31 Dec 2046	03 Aug 2022, 3:16 PM	John Doe	<div></div> <div></div>
Gene Eva (gene.ev...	08 Aug 2022	27 Aug 2022	03 Aug 2022, 9:25 AM	John Doe	<div></div> <div></div>

Viewing out-of-office records

The out-of-office records list contains the following elements:

1. **User** - firstName, lastName, userName
2. **Start Date** - the date when the out-of-office period will be effective
3. **End Date** - the date when the out-of-office period will end
4. **Edited at** - the last time when an out-of-office record was edited
5. **Edited by** - the user who edited/created the out-of-office record

Out of office

Search by user

Add out-of-office

1	User	2	Start Date	3	End Date	4	Edited at	5	Edited by
	Jane Smith (jane....		03 Aug 2022		07 Aug 2022		03 Aug 2022, 3:24 PM		John Doe
	Bess Twishes (be...		03 Aug 2022		31 Dec 2046		03 Aug 2022, 3:16 PM		John Doe
	Gene Eva (gene.e...		08 Aug 2022		27 Aug 2022		03 Aug 2022, 9:25 AM		John Doe

! INFO

The list is sorted in reverse chronological order by “edited at” `dateTime` (newest added on top).

Was this page helpful?