Personal Tasks Guide

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Overview

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The Personal Tasks application allows self-service users to manage their own personal tasks and task lists.

Personal tasks allows you to customize your "To Do" list, share tasks with colleagues and so help improve your productivity by organizing your work more efficiently.

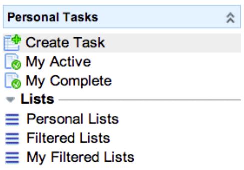
The Personal Tasks application is available on the desktop and on mobile devices, starting with the Dublin Release.

Example Usage

Abel Tuter is assigned to work on a new project, **ACMEBuild**, with a variety of responsibilities and sub-projects.

Abel can create a new **ACMEBuild** personal list, and create multiple tasks for himself and others within that list, to help organize his work within this new project. Abel can mark these tasks as complete when done, and can share the list of tasks with other project members if required.

Menus and Modules



Personal Tasks contains these modules:

- **Create Task**: Create a new personal task.
- **My Active**: View and edit active personal tasks.
- **My Complete**: View and edit closed personal tasks.
- **Personal Lists**: View and create personal task lists.
- **Filtered Lists**: View and edit global filtered task lists.
- **My Filtered Lists**: View and edit personal filtered task lists.

Activating Personal Tasks

Administrators must activate the Personal Task Management plugin to provide access to the feature.

Click the plus to expand instructions for activating a plugin.

If you have the admin role, use the following steps to activate the plugin.

1. Navigate to **System Definition > Plugins**.
2. Right-click the plugin name on the list and select **Activate/Upgrade**.

   If the plugin depends on other plugins, these plugins are listed along with their activation status.
3. [Optional] If available, select the **Load demo data** check box.

   Some plugins include demo data—sample records that are designed to illustrate plugin features for common use cases. Loading demo data is a good policy when you first activate the plugin on a development or test instance. You can load demo data after the plugin is activated by repeating this process and selecting the check box.
4. Click **Activate**.

Installed Components

Overview

Activating the Personal Task Management plugin adds or modifies tables, business rules, and other components.

Tables

Personal task management adds or modifies the following tables.

Display Name [Table Name]	Description
Personal Task [personal_task]	The base table for all personal task information.
Personal List [personal_list_label]	The table for storing a user's individual lists, which personal tasks can be associated to.
Filtered Personal List [personal_list_filtered]	The table for storing global filtered lists.

UI Actions

Personal task management adds the following UI actions.

UI Action	Table	Description
Make Default	Personal List [personal_list_label]	Make the current list the default list.
Delete	Personal List [personal_list_label]	Delete the current list but prompt if there are tasks.
Change List	Personal Task [personal_task]	Change the list associated to the current personal task.

UI Policies

Personal task management adds the following UI policies.

UI Policy	Table	Description
Manage fields	Personal Task [personal_task]	Sets mandatory and read only fields for personal tasks.
Make default list flag read only	Personal List [personal_list_label]	Sets the default list flag to be mandatory to enforce data integrity across lists.
Show Owner field if not global	Filtered Personal List [personal_list_filtered]	Shows the **owner** field if the list is for a specific user.

Business Rules

Personal task management adds the following business rules.

Business Rule Name	Table	Description
Set user if not global	Filtered Personal List [personal_list_filtered]	Sets the owner of the list to the current user if the list is not set to global.
Set owner	Personal List [personal_list_label]	Sets the owner on personal lists to be the current user.
Make sure there is only one default	Personal List [personal_list_label]	Ensures that a user can only have a single default list.
Create default if none present	Personal List [personal_list_label]	Ensures that a default list exists for the user.
Set label type	Personal List [personal_list_label]	Ensures that the **type** field is set to **personal_task** and the **navigation** field is set to **false** so that the personal lists do not conflict with the label functionality.
Set task as read (insert)	Personal Task [personal_task]	Sets the **read** flag to **true** for the user who creates a new personal task.
Set task as read (display)	Personal Task [personal_task]	Sets the **read** flag to **true** for the user who views a personal task.
Process personal task (insert, update)	Personal Task [personal_task]	1. Ensures the owner of the task is set to the current user. 2. Ensures that the task is associated to the a list. The default list is used if a list is not specified.
Process personal task (delete)	Personal Task [personal_task]	Cleans up the association between a personal task and lists when a personal task is deleted.
Personal task restrictions on read	Personal Task [personal_task]	Limits the results of queries on the personal task table to users in the **owner**, **assigned_to**, or **members** fields.

Using Personal Tasks

Note: *This article applies to Fuji and earlier releases. For more current information, see Visual Task Board Use* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated. Visit** http://docs.servicenow.com **for the latest product documentation.**

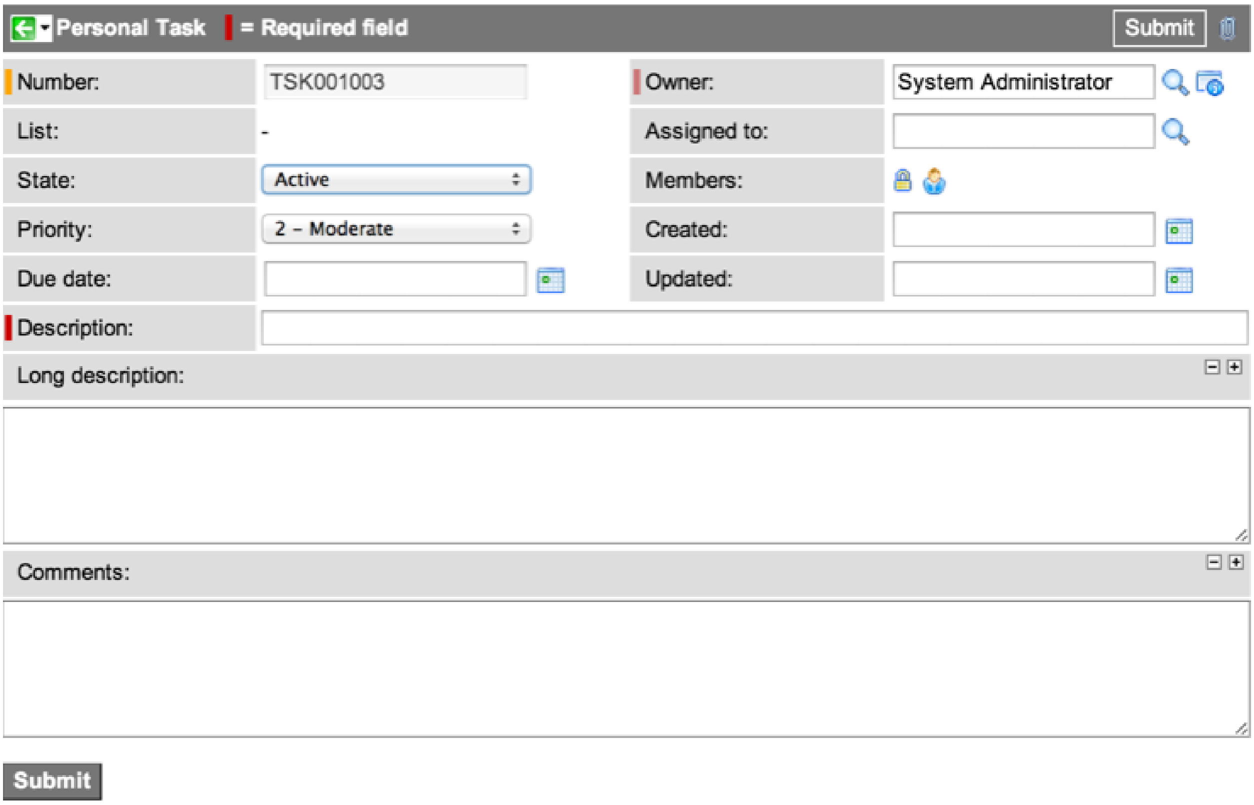
Overview

You can use personal tasks to:

- Create personal tasks, allowing you to manage your list of tasks efficiently and access this list from desktop or mobile devices.
- Organize personal tasks into groups, using personal task lists to reflect different projects or work commitments.
- Mark tasks as closed when they are finished and view lists of your active and closed tasks.
- Use filtered lists to make standard queries, showing information such as which tasks are due tomorrow. You can also create your own filtered lists to make your own queries.

Creating Personal Tasks

1. Navigate to **Personal Tasks > Create Task**.
2. Fill in the fields (see table).



3. Click **Submit**.

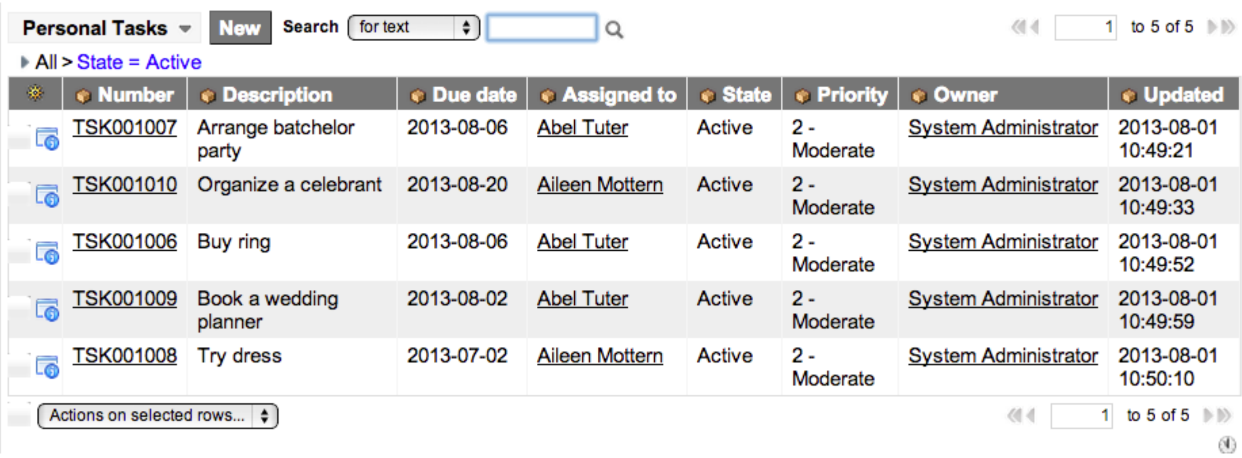
Field	Description
Number	An automatically-generated task ID.
Owner	The task owner. Initially, this is the task creator.
List	The list this task belongs to. If unspecified, the task is placed in the default list.
Assigned to	The user who the task is assigned to.
State	The state of the task. Values can be **Active** or **Closed**. Active and closed tasks can be viewed from **Personal Tasks > My Active**, and **Personal Tasks > My Closed**.
Members	Users who are associated with, or have an interest in, the task. Members can view and edit tasks in the same way that task owners can.
Priority	The task priority. Values can be **1 - High**, **2 - medium**, or **3 - low**.
Created	The date and time the task was created. This is automatically set when the task is submitted.
Due Date	Date and time when the task is due.
Updated	Date and time the task was last updated. This is automatically set when the task is updated.
Description	A short summary of the task.
Long description	A more detailed task description.
Comments	Any comments about the work to be done or the progress. Comments are generally added while working on the task.

Viewing Tasks

A personal task can be viewed by users who:

- Own the task.
- Have been assigned to the task.
- Are associated with (a *member* of) the task.

Navigate to **Personal Tasks > My Active** or **Personal Tasks > My Complete** to view tasks in the **Active** or **Complete** state that are in some way associated with you.



Number	Description	Due date	Assigned to	State	Priority	Owner	Updated
TSK001007	Arrange batchelor party	2013-08-06	Abel Tuter	Active	2 - Moderate	System Administrator	2013-08-01 10:49:21
TSK001010	Organize a celebrant	2013-08-20	Aileen Mottern	Active	2 - Moderate	System Administrator	2013-08-01 10:49:33
TSK001006	Buy ring	2013-08-06	Abel Tuter	Active	2 - Moderate	System Administrator	2013-08-01 10:49:52
TSK001009	Book a wedding planner	2013-08-02	Abel Tuter	Active	2 - Moderate	System Administrator	2013-08-01 10:49:59
TSK001008	Try dress	2013-07-02	Aileen Mottern	Active	2 - Moderate	System Administrator	2013-08-01 10:50:10

Click a task number to view and edit details for that task.

Using Lists

Task lists allow tasks to be grouped, categorized, and managed. You can:

- Create your own personal lists to group and view your own tasks, for example all tasks associated with a specific project.
- View filtered lists to display standard information, such as which tasks are due tomorrow.
- Create personal filtered lists to display your own reports, using standard condition builders.

Creating Personal Lists

1. Navigate to **Personal Tasks > Lists > Personal Lists** to view your own task lists.

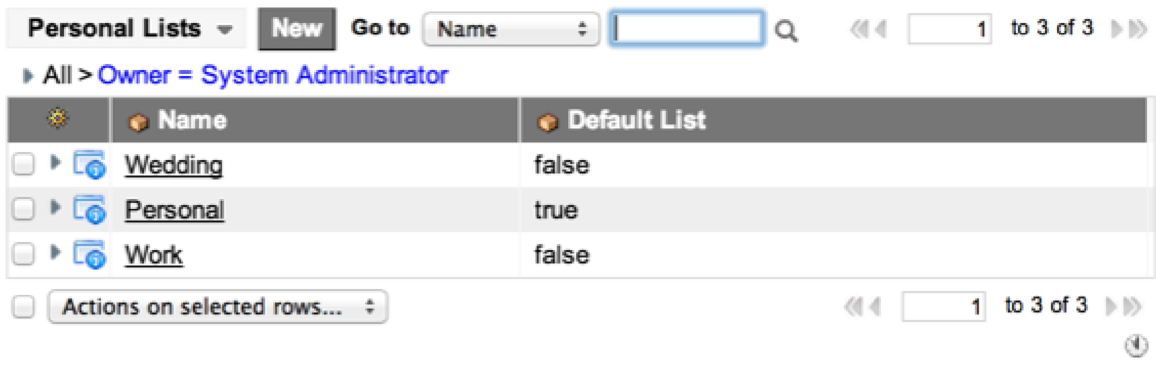
   By default, two task lists are provided: **Personal** and **Work**.
2. Click **New**.

3. Enter the list details:

   Name: Enter the list name.

   Default List: Select the check box to make this the default list which new tasks are automatically assigned to. Only one list can be the default list.
4. Click **Submit**.

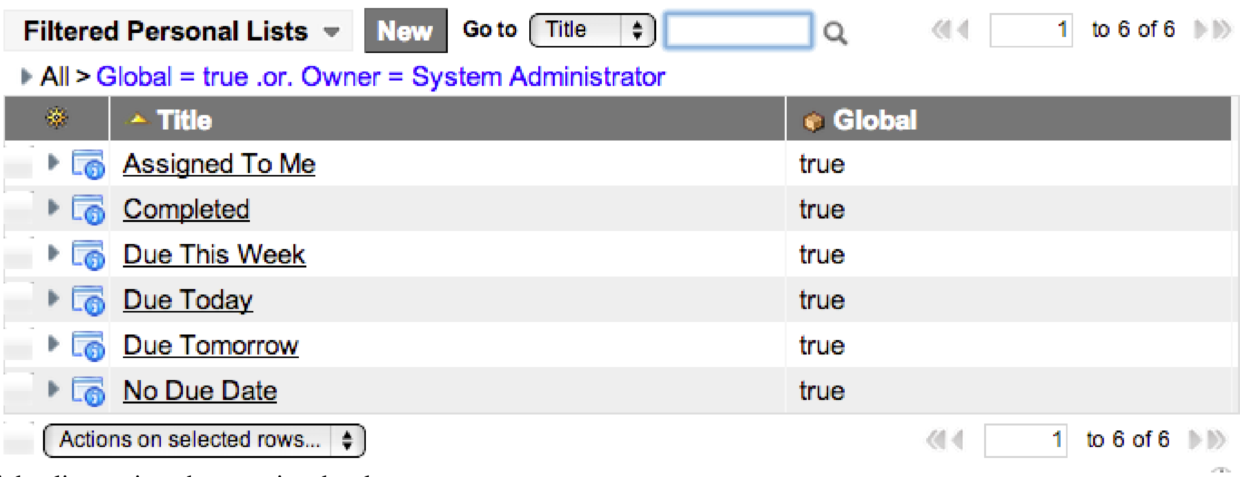
   The list appears alongside the other lists.



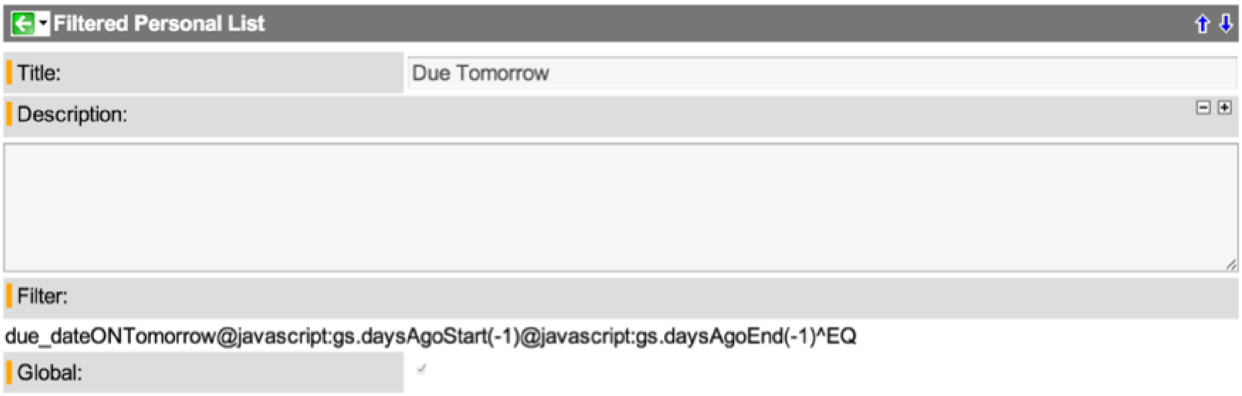
Viewing Filtered Lists

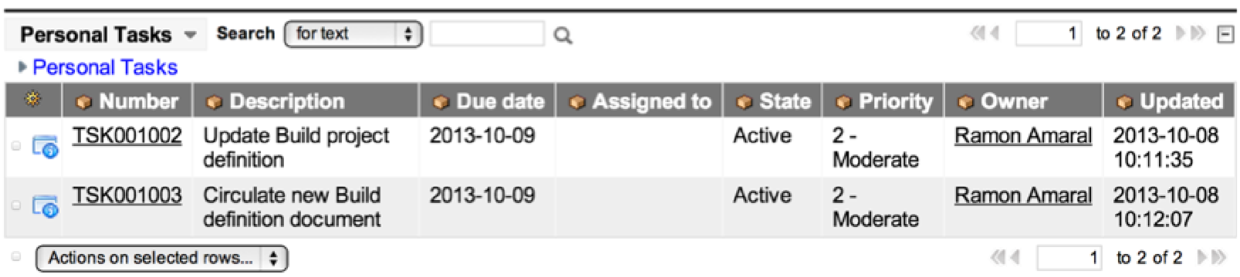
Filtered lists show reports of tasks that you are associated with, that meet specific standard filter conditions. Administrators can customize these lists using standard condition builder functions.

1. Navigate to **Personal Tasks > Lists > Filtered Lists** to view the default filtered lists available to view.



2. Click a list to view the associated tasks.





Using Filtered Personal Lists

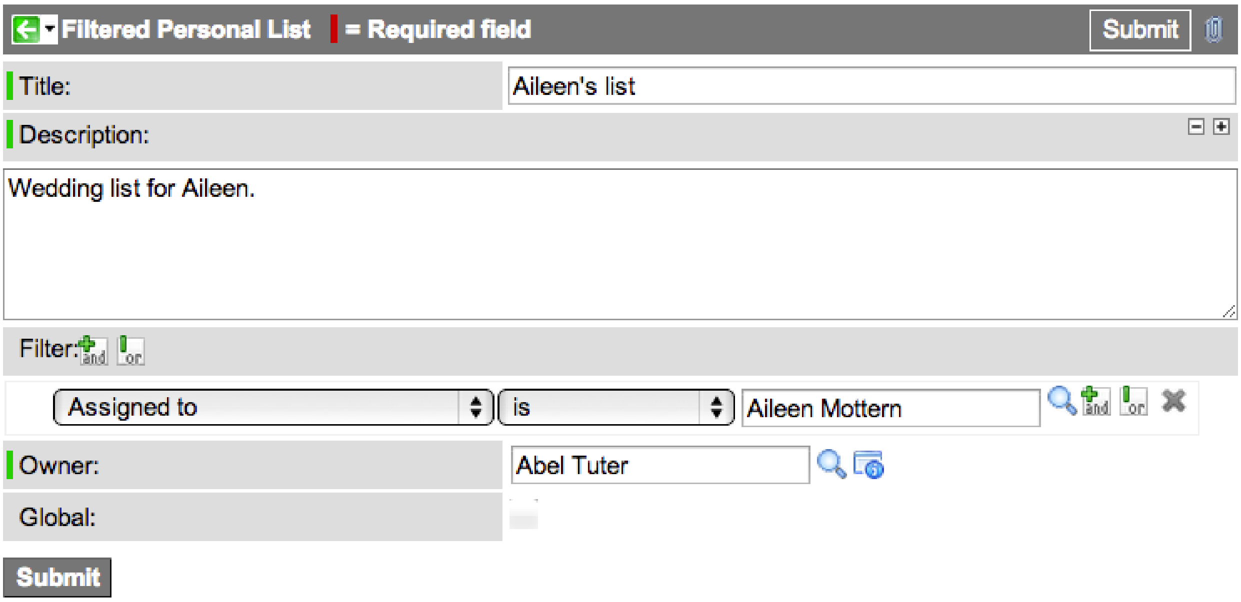
You can create filtered personal lists to show tasks that meet a customized filter condition.

Administrators can:

- Set a filtered personal list as global to make it visible as a new standard filtered list.
- Change the owner for the list.

To create a filtered personal list:

1. Navigate to **Personal Tasks > Lists > My Filtered Lists** to view any of your own personal filtered lists.
2. Click **New** to create a new personal filtered list.



3. Fill in the details, using standard condition builder functions to define the conditions for your personal list.
4. Click **Submit**.

References

[1] https://docs.servicenow.com/bundle/jakarta-servicenow-platform/page/use/visual-task-boards/concept/c_VisualTaskBoardUse.html

Using Mobile Devices

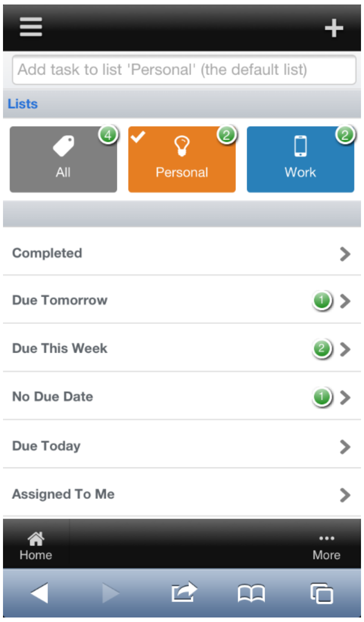
Overview

All personal task functions can be accessed from mobile devices.

For general information on using ServiceNow with mobile devices, see Using the Mobile Interface.

Using Task Lists

Navigate to **PERSONAL TASKS > Lists** to view the standard filtered lists available.



The green numbers show how many tasks are in each list.

From this view, you can:

- Edit lists.
- Change the default list.
- Add a task to the default list.

Editing Task Lists

To create a new list:

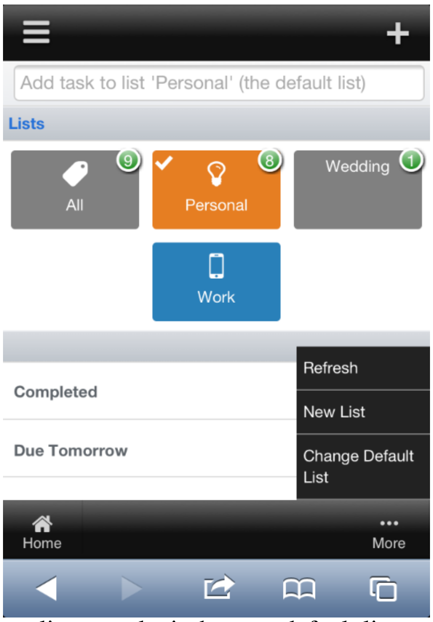
1. Select **More** > **New List**.

2. Enter the new list name, select a color and icon, and select whether this is the default list for new tasks.
3. Click **Save**.

Changing the Default Task List

To change the default list:

1. Select **More** > **Change Default List**.

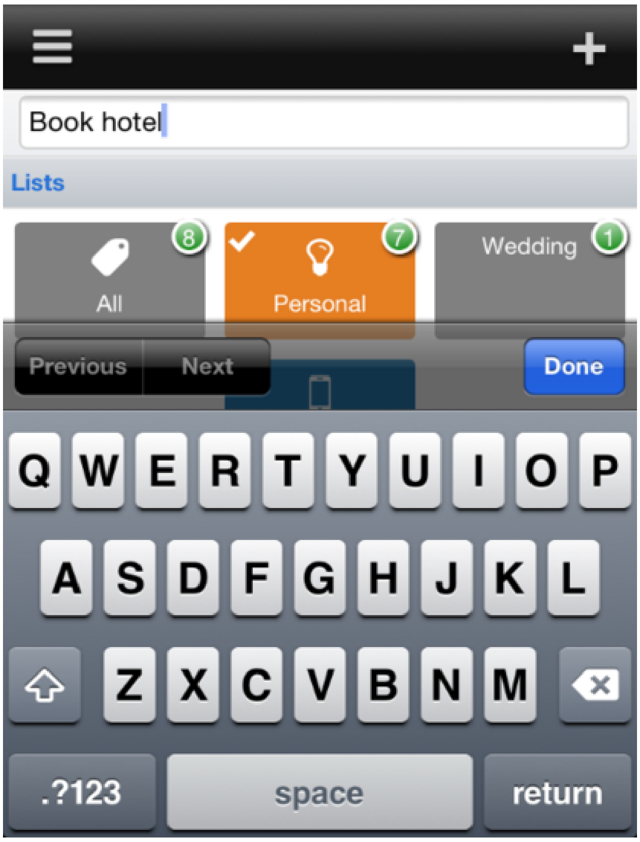


2. Tap a list to make it the new default list.
3. Navigate back to the lists page, and see that the default list has now been changed to your selection.

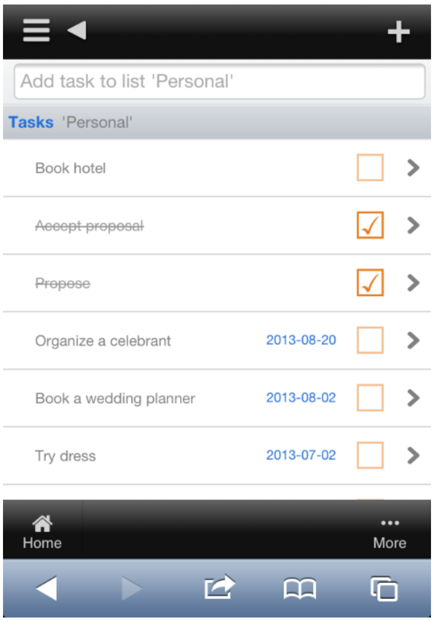
Using Tasks

Adding Tasks

1. Navigate to **PERSONAL TASKS > Lists**
2. Enter the task name in the field above the lists, then tap **Done**.

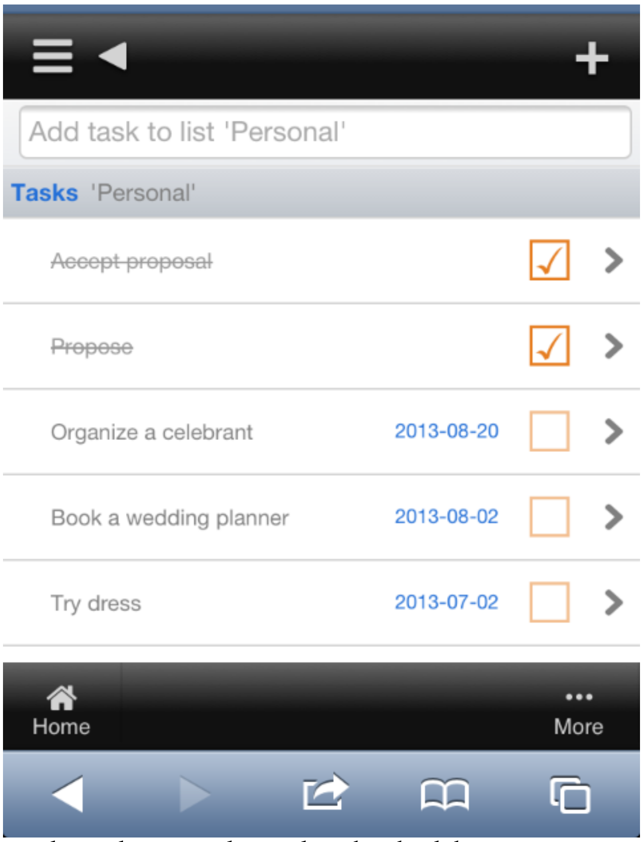


This task appears at the start of the list selected as default for your tasks.

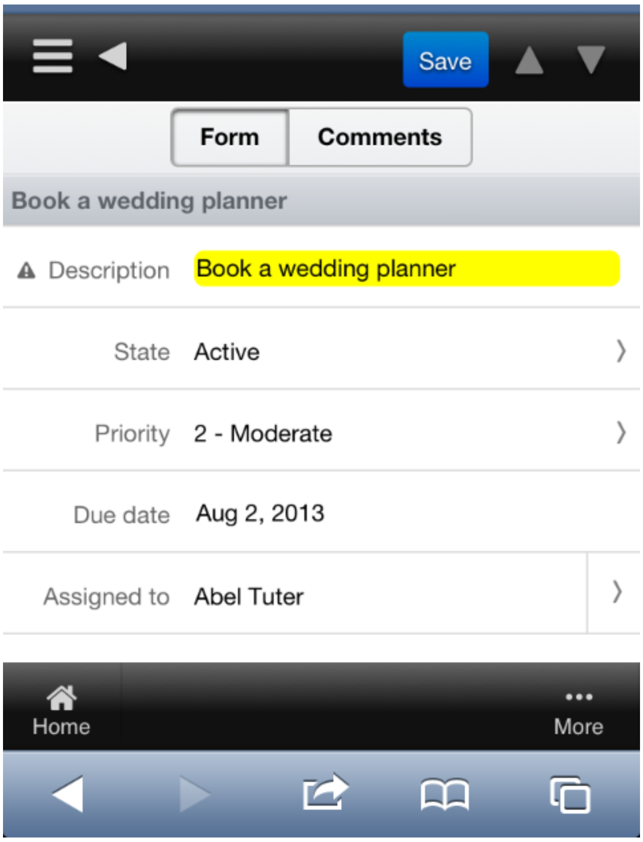


Working on Tasks

1. Navigate to **PERSONAL TASKS > Lists**.
2. Tap a list to view the tasks in that list.



3. To mark a task as complete, select the check box.
4. Within a list, tap an individual task to view the task details.



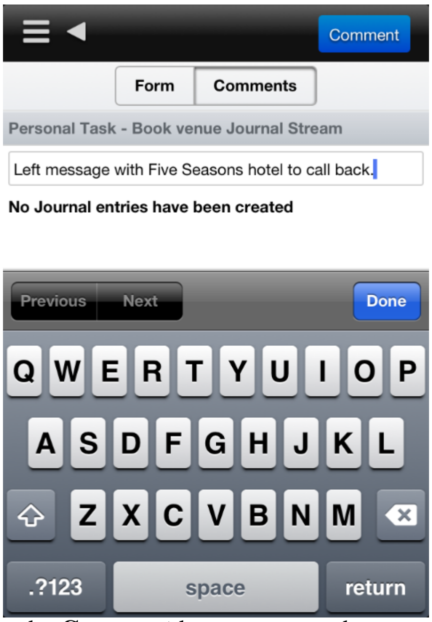
5. Edit and save task information.

Adding Comments to a Task

Comments allow you to track progress of that task.

To add individual comments to a task:

1. Tap **Comments**.
2. Enter the comment.



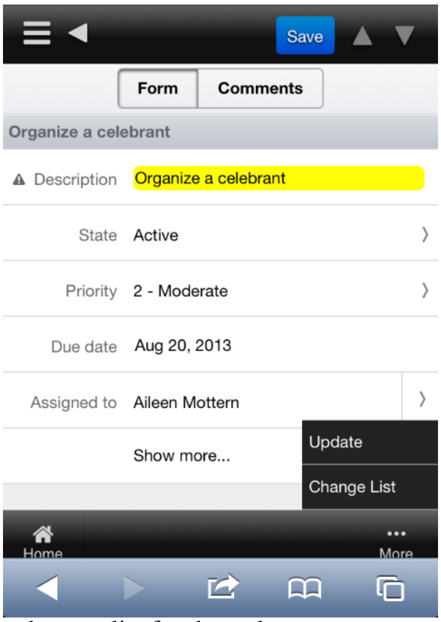
3. Tap the **Comment** button to save that comment.

Note: *Comments can be viewed on the work stream.*

Changing a Task's List

To change the list associated with a specific task:

1. Open a task.
2. Select **More** > **Change List**.

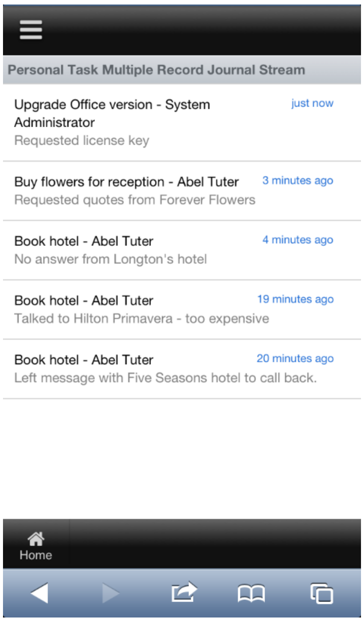


3. Tap the new list for the task.

Using Work Streams

The work stream lists journal information based on the comments on individual tasks. If you are associated to a task, you can view the work stream for that task.

Navigate to **PERSONAL TASKS** > **Work Stream** to view this information.



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