Tasks

Release 15.4.1.1

CONTACT Software

Oct 29, 2018

Contents

CHAPTER 1

Introduction

CONTACT Tasks provides a complete personal cockpit of current tasks, along with the most important contextual information and sign-off functionality.

Specifically, *CONTACT Tasks* supports you in prioritizing and completing your personal tasks and those of your team. The most important information and operations are always just a click away. This gives you the best possible overview of your tasks.

Tasks are basic elements of processes, projects and reviews. They are the foundation of teamwork based on the division of labour and determine who is responsible for what by when.

Note: *CONTACT Tasks* displays tasks of different types. Your administrator has defined in the configuration which task types these are.

CHAPTER 2

User interface

2.1 Start *CONTACT Tasks*

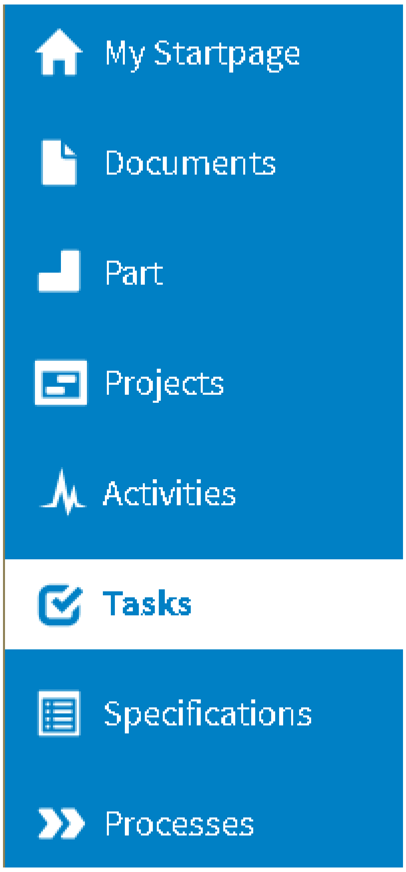

Fig. 2.1: Start *CONTACT Tasks* (Web Client)

Click the *Tasks* icon in the navigation area to start *CONTACT Tasks*.

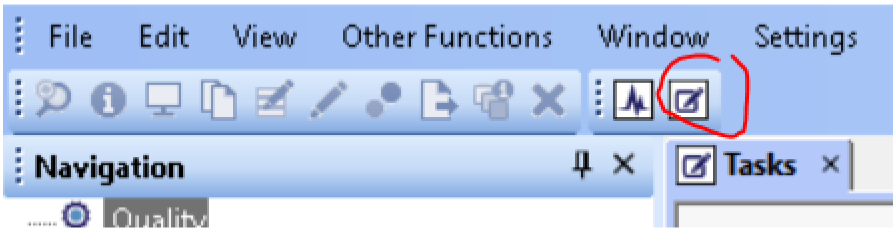

Fig. 2.2: Start *CONTACT Tasks* (Windows Client)

2.2 Areas of *CONTACT Tasks*

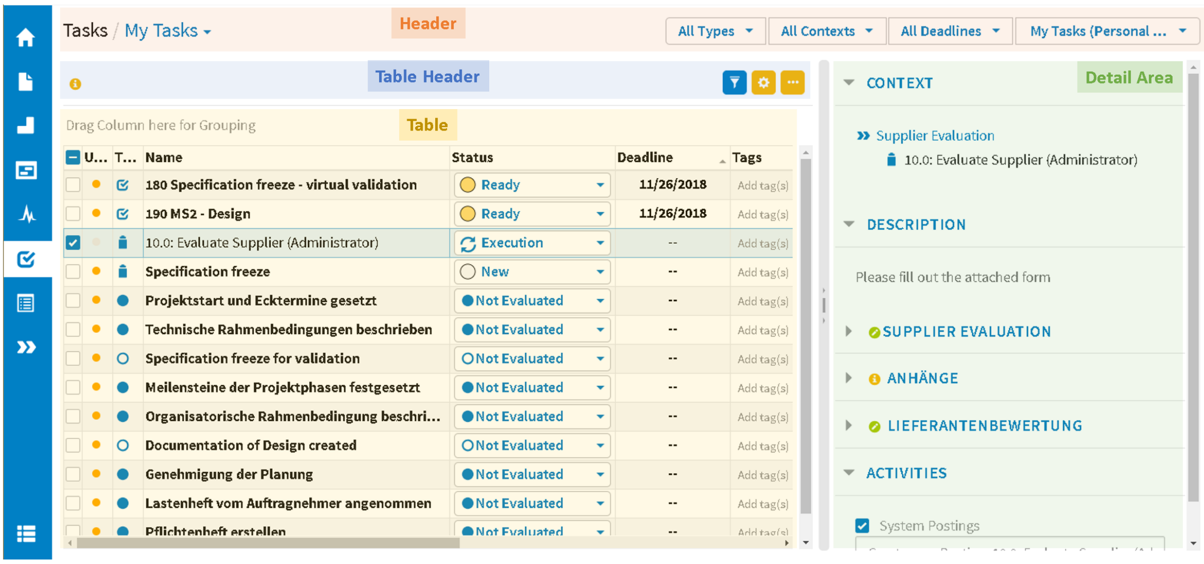

Fig. 2.3: Areas of *CONTACT Tasks*

The interface of *CONTACT Tasks* is divided into four areas:

1. *Header* (page 4) (including user views and filters)
2. *Table header* (page 11) (including notifications and table settings)
3. *Table* (page 14) (including the grouping pane)
4. *Detail area* (page 17)

CHAPTER 3

Header

The header lets you

- switch between different *user views* (page 4) and manage them, and
- *filter* (page 5) which criteria the tasks to be displayed should fulfill.

3.1 User views

To the left of the application name “Tasks” you will see the user views menu. It is labeled with the name of the current user view. Clicking the name will open the menu.

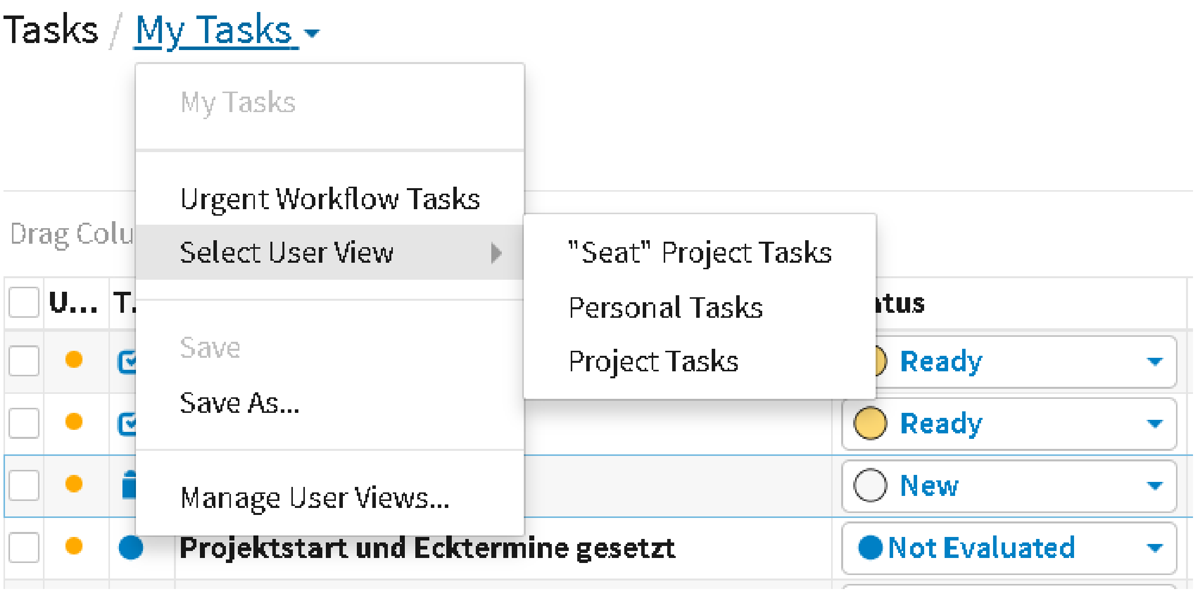

Fig. 3.1: Open user view menu

A user view contains all current filter settings. By switching to another user view, you can switch all filters to a preconfigured scenario with a single click.

There are three kinds of user views:

- Default user view
- Preconfigured user views
- Personal user views

The default user view is always displayed first in the user view menu. All other views are located in the area below. The three user views most recently used can be found directly below (in alphabetical order), all others in the submenu “Select User View”.

Default and preconfigured user views have been prepared by your administrator and represent useful starting points. You can personalize these views by changing the corresponding filter settings and then saving the views.

Alternatively, you can create your own views with “Save as. . . ”.

3.1.1 Manage user views

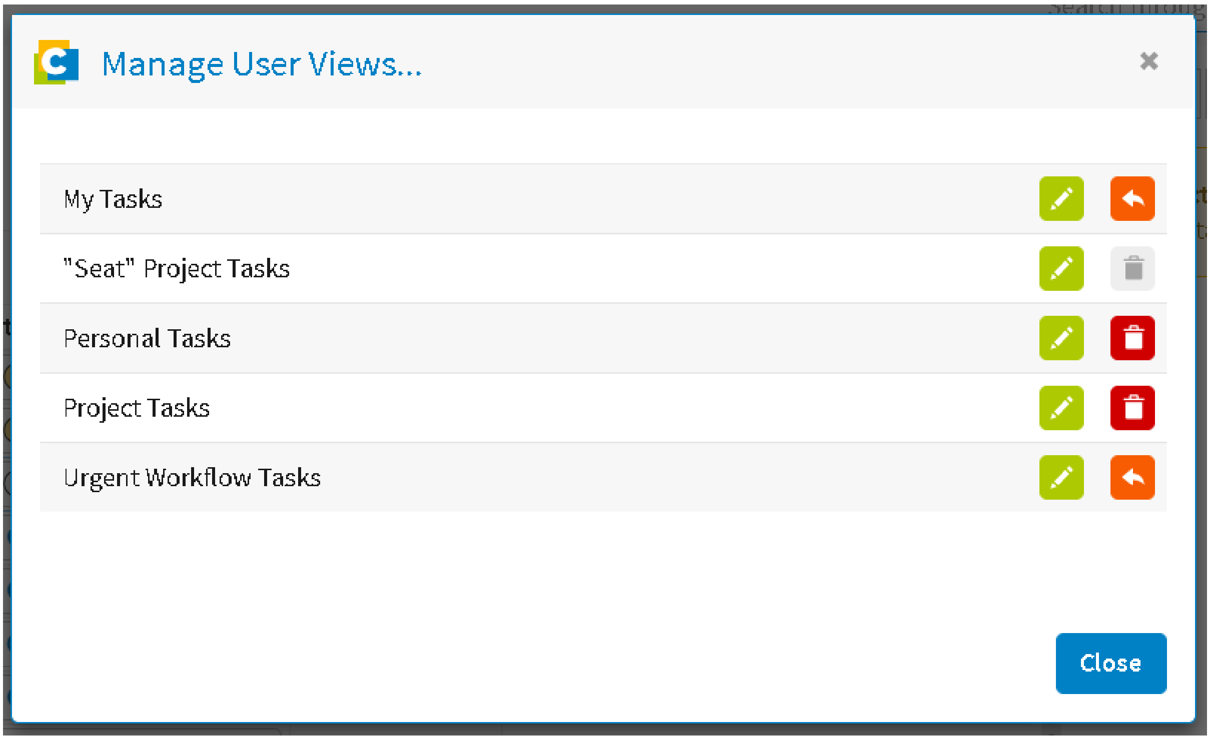

Fig. 3.2: Dialog “Manage User Views. . . ”

In the dialog “Manage User Views. . . ”, you can

-  rename user views (renamed default and preconfigured user views will be personalized by this),
-  delete personal user views and
-  revert personalized user views to their default state.

3.2 Filter

The task filters are displayed in the right area of the header. Click a filter to open it. You can change the filter while it is open.

Once you change the setting of a filter, the current *user view* (page 4) is considered changed. Changes are not saved automatically.

Warning: Before leaving *CONTACT Tasks* with changed user views, your browser displays a default warning message. If you confirm the message, you will leave *CONTACT Tasks* and the unsaved changes are lost.

Filters determine which tasks you see in the *table* (page 14). When you first start *CONTACT Tasks*, the filters should be set so that you can see your personal active tasks.

Note: You cannot use the filters to control all parameters for the display. Your administrator has predefined some fixed filters. Usually, for example, only active tasks are displayed in *CONTACT Tasks*.

3.2.1 Filter "Type"

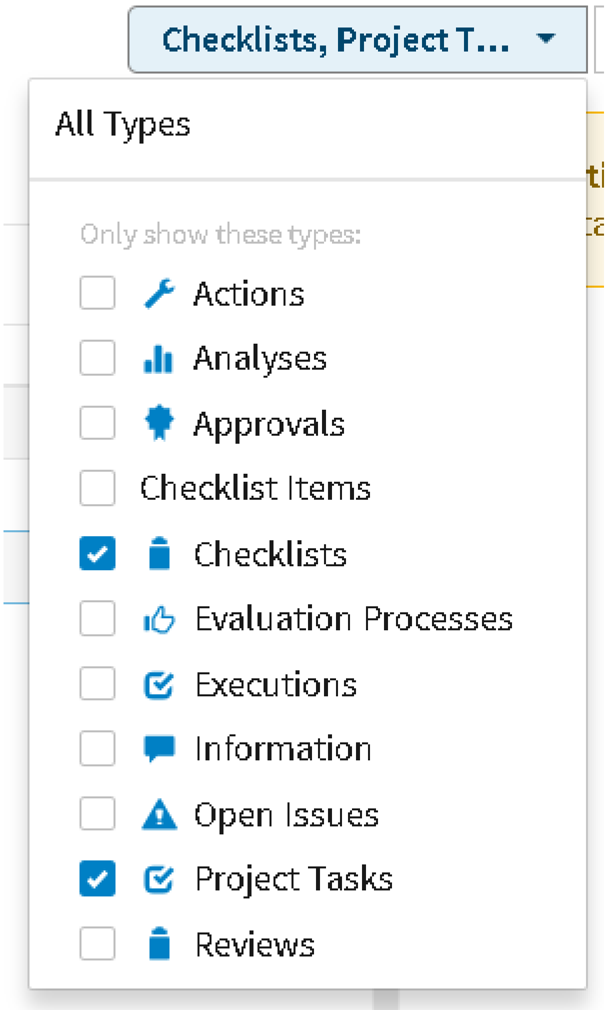

Fig. 3.3: Filter "Type"

You can use this to filter individual task types ("classes") from the displayed task set. For example, you can only focus on "Open Issues" and "Project Tasks".

If no type filter is selected ("All Types"), all tasks are displayed regardless of their type.

3.2.2 Filter "Context"

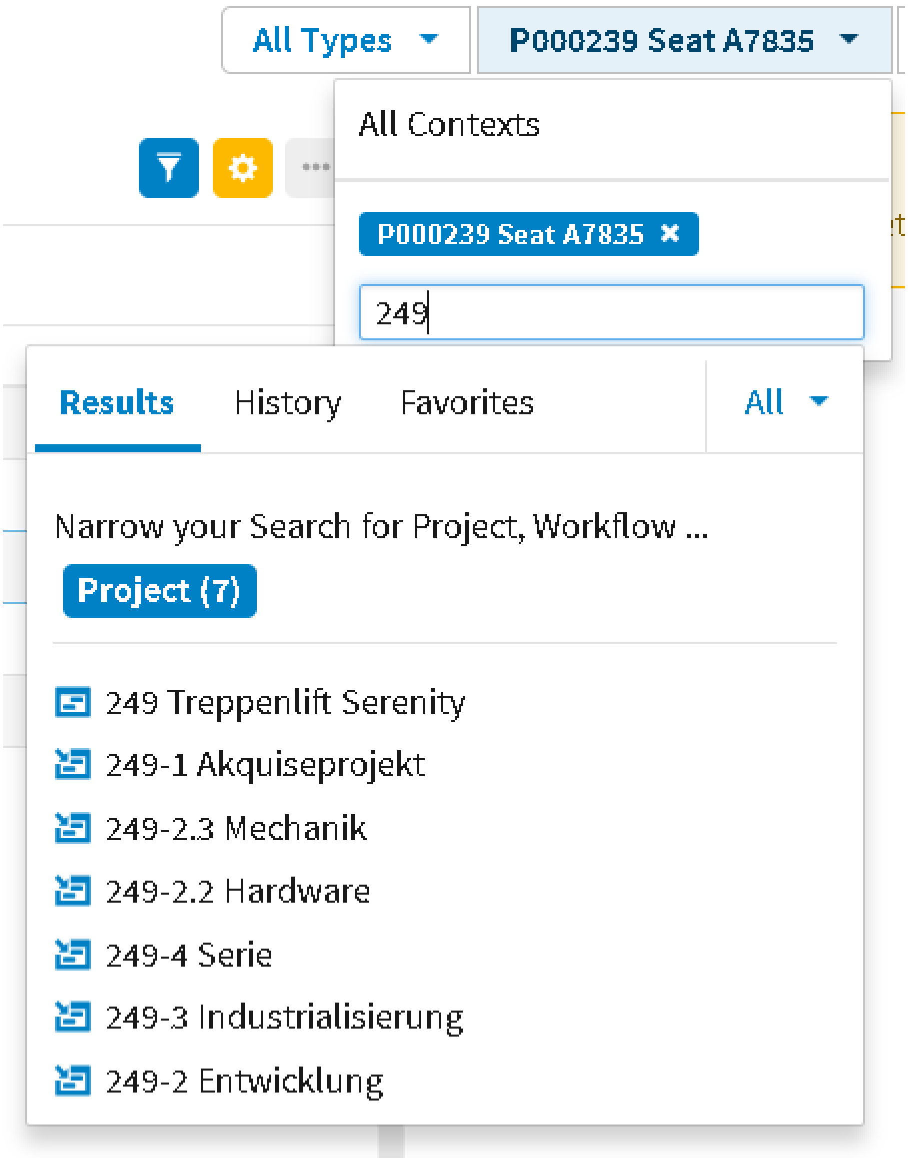

Fig. 3.4: Filter "Context"

The "context" of a task can differ a lot between tasks. Examples of task context objects are projects or workflows. In the search field of the filter, you can search for context objects of activated classes and select them.

The search is conducted by using CIM Database/Enterprise Search.

Note: Your administrator determines which classes of context objects you can filter.

3.2.3 Filter "Deadline"

This filter offers two options:

- Filtering by a relative maximum deadline and
- filtering by an absolute deadline interval.

To deactivate the filter, click "All Deadlines".

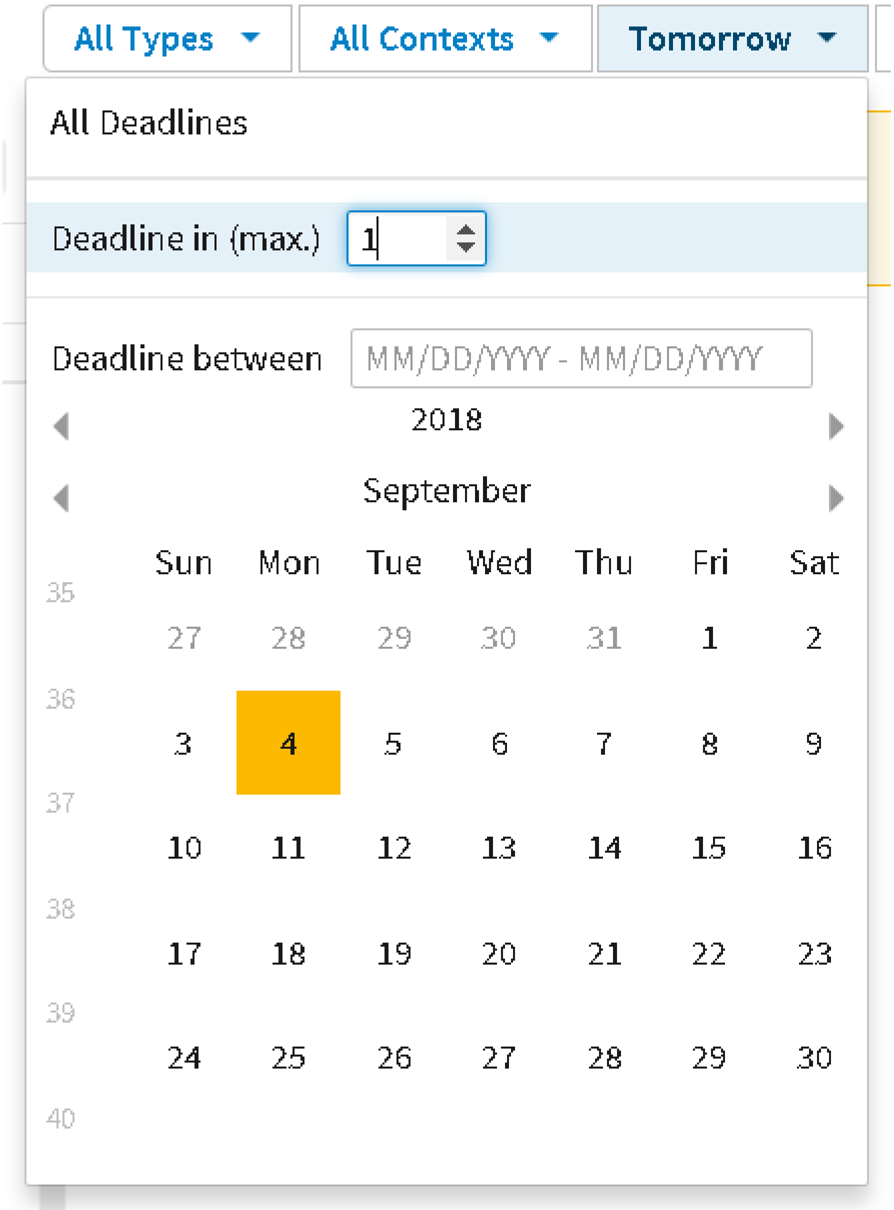

Fig. 3.5: Filter "Deadline"

Warning: Tasks without a deadline are only visible if the filter is deactivated, since they do not meet any deadline criteria.

Relative deadlines

Click "Deadline in (max.)" to display all tasks whose deadline is no later than the specified number of days in the future. Negative numbers refer to the past.

For example, to see only tasks that are already overdue or are due today, activate this filter with the value `0`.

Deadline intervals

Click "Deadline between" to display only tasks whose deadline is within the selected interval.

You can enter an interval directly in the text field or select one by using the calendar. The text field gives you an indication of the expected date format. This depends on your personal settings.

3.2.4 Filter "Responsibility"

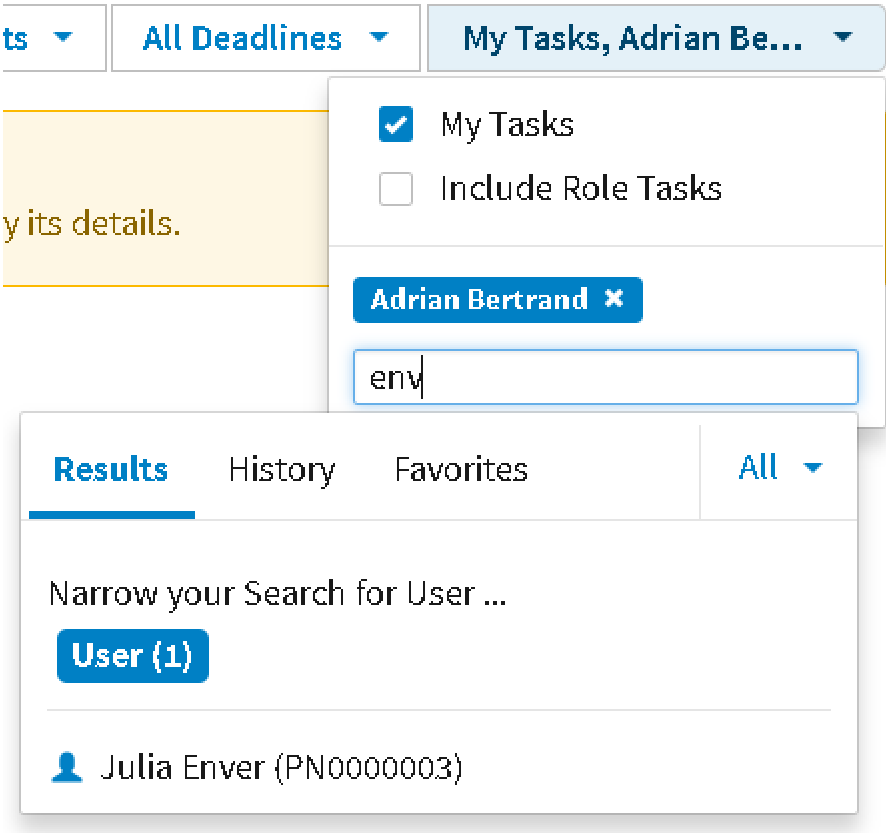

Fig. 3.6: Filter "Responsibility"

This filter consists of the following three elements:

- "My tasks"
- "Role tasks"
- "Search for responsibilities"

Warning: If neither "My Tasks" nor users (from search results) are selected, no tasks are displayed.

My tasks

This option lets you easily include or exclude your own tasks.

Role tasks

If this option is active, tasks for which the selected users are only responsible via role assignments are also displayed.

If deactivated, only tasks personally assigned to the selected users are displayed.

Search for responsibilities

Note: This function is only available to you if you are granted the appropriate permission.

Type a user name in the search field to search for users. You can then select users from the search results to also display their tasks.

Warning: Please note that you will only see tasks for which you have read access. You may not be allowed to see all tasks of all selected users.

Selected users can be removed by clicking the small `X`.

With this filter it is possible to create *user views* (page 4) for teams, for example to support planning meetings.

CHAPTER 4

Table header

The table header contains notifications about updated tasks and table tools.

4.1 Notifications

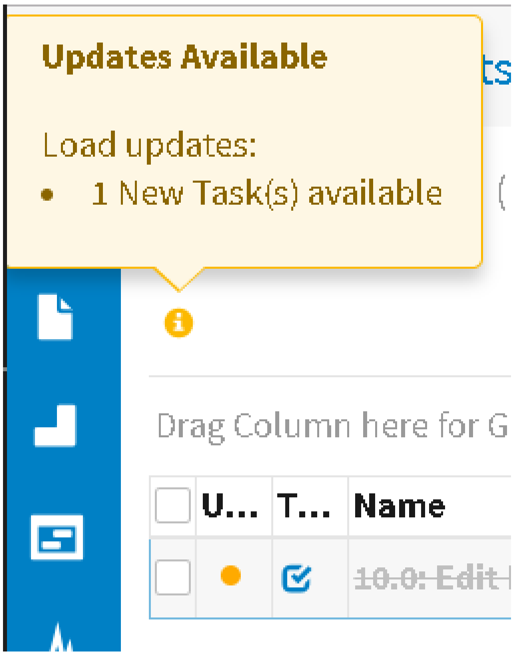

Fig. 4.1: Notification about a new task

Notifications are only displayed if updated information is found on the server. *CONTACT Tasks* automatically compares this information in a preconfigured interval.

If there are new tasks on the server matching your currently selected filters or currently displayed tasks have already been completed, a notification is displayed. This allows you to load the updated tasks.

Tasks completed outside your *CONTACT Tasks* session are displayed crossed out after the first reload (with the previous data, especially not the task's current status). In this way, you can track the process. Completed tasks are

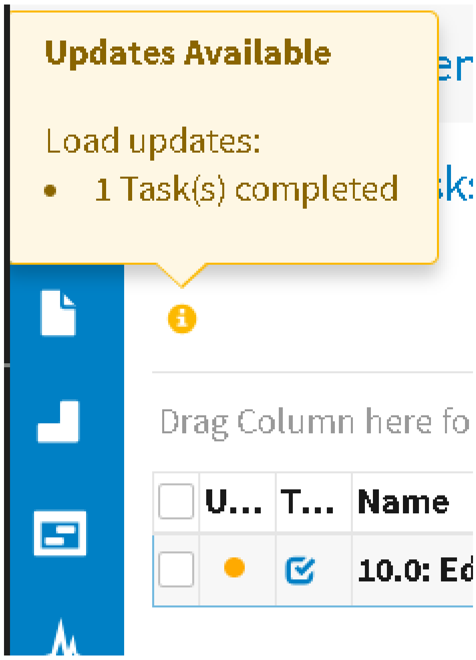

Fig. 4.2: Notification about a completed task

not displayed after reloading again.

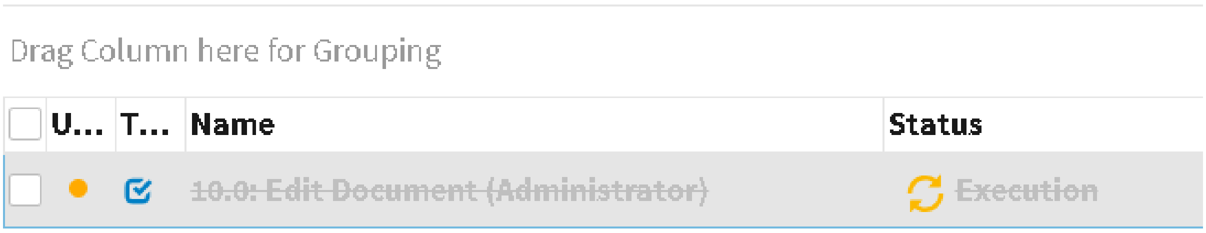

Fig. 4.3: Completed task

4.2 Table tools

Table tools help you

- reduce table rows with a temporary filter text,
- adapt the table view to your needs and
- Run operation on the selected tasks.

Note: Available operations depend on the current selection. In particular, if no task or tasks of different types are *selected* (page 14), no or fewer operations are available.

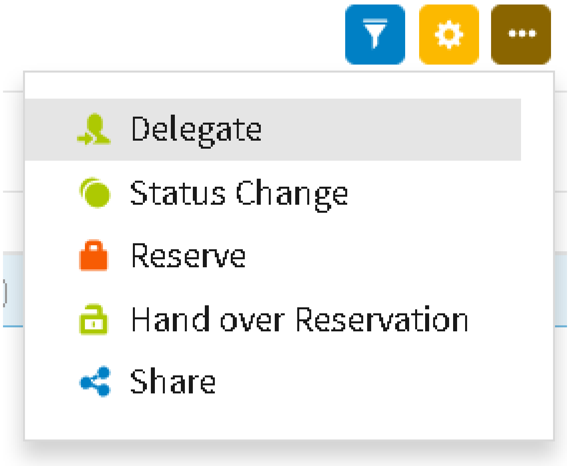

Fig. 4.4: Delegate a task

4.3 Delegate

"Delegate" is a special operation that is usually enabled for all task types. By delegating a task, you change its responsibility. The system attempts to propose the person responsible for the task context (e.g. the project manager or person responsible for the workflow), if any existing.

Delegate a task if you believe it has a wrong responsibility, is irrelevant or misleading.

CHAPTER 5

Table

The table shows all tasks that correspond to the current filter combination below the grouping pane. Each table row represents one task.

Clicking the first column or a non-interactive area within a table row selects the task for display in the *detail area* (page 17).

Some special table columns are described below.

5.1 Selection Column

The first column allows the selection of a single or (in combination with the `Shift` or `Control` keys) multiple table rows.

While the details area always displays details of one of the selected tasks only, you can select several rows to perform shared operations on them (see *Table tools* (page 12)).

Interactions within the table (such as setting read status, status, and tags) works on the respective table row only.

5.2 Column "Unread?"

Tasks are considered unread until you first select them in *CONTACT Tasks*. Unread tasks are highlighted in bold. In addition, a yellow dot icon is displayed in the `Unread?` column.

By clicking a task's `Unread?` cell you can toggle the task's read status between "read" and "unread". A task is also marked as read when selected.

5.3 Column "Status"

The column `Status` shows the current status of the respective task. You can also quickly change the task's status:

1. Click a task's current status to show available new statuses.
2. Select the new status.

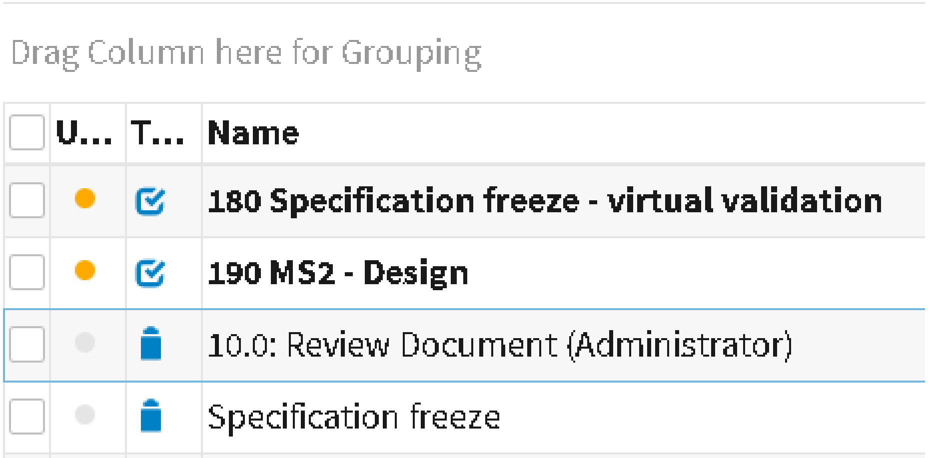

Fig. 5.1: Read status of a task

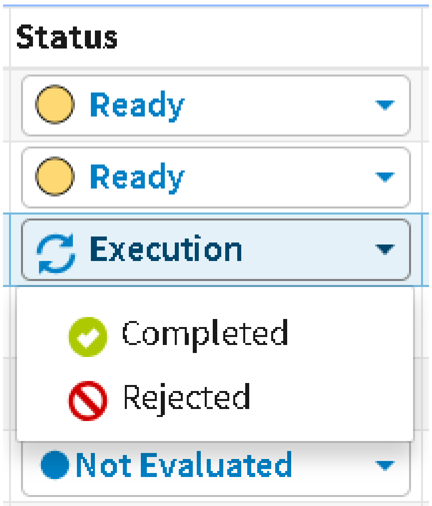

Fig. 5.2: Status of a task

3. The status change is executed immediately if no further input is required. Some task types require you to enter a comment. If this is the case, you can enter the comment in the following dialog.
   - Confirming the dialog will execute the status change.
   - Canceling the dialog will also cancel the status change.

Note: Please note that this column also supports other operations than "Change Status", depending on the task type. For example, some task types can simply be marked as "read" or be signed.

Note: Alternatively, the status of a task can be changed via the operation menu in the *table header* (page 11) if the task is selected.

5.4 Column "Tags"

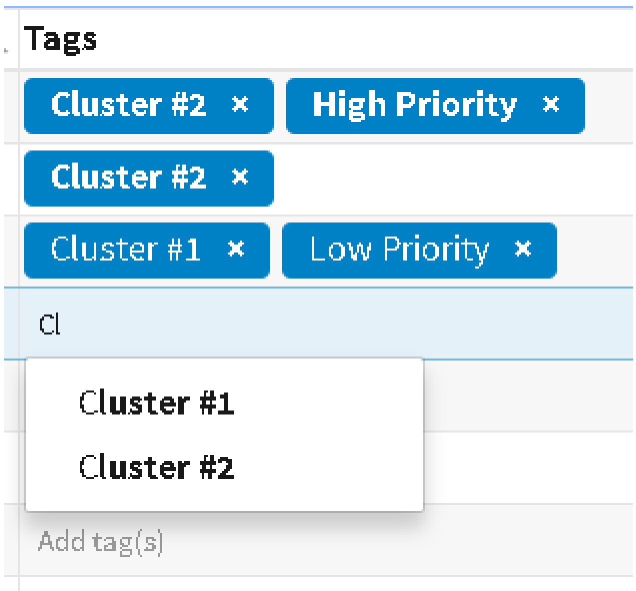

Fig. 5.3: Tags of a task

"Tags" let you add additional personal information to tasks. They allow you to classify, group or sort tasks to personal preferences.

1. Click into the `Tags` cell and write your text. Existing tags are shown as suggestions.
2. You can enter multiple tags comma-separated.
3. If your text is complete, press the `Enter` key.

Tags are displayed in alphabetical order. Duplicates will be removed.

You can remove tags by clicking a tag's `X` or pressing the `Backspace` key in the empty text input.

CHAPTER 6

Detail area

Fig. 6.1: Detail area of a task with collapsed blocks

Details of the task most recently selected in the table are displayed in the detail area. Which information is displayed in the details area depends on the selected task.

6.1 Detail block "Context"

Context shows the (simplified) parent hierarchy of the task. The task itself is located at the end of this hierarchy.

The context helps you to

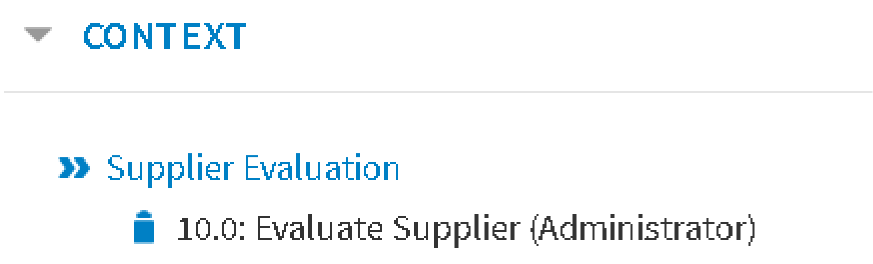

Fig. 6.2: Detail block "Context"

- understand the task more quickly and
- navigate to other levels of the context hierarchy with a single click.

Note: Only the first context that could be derived is displayed, even if there are other possible paths. If you expect a different context hierarchy for a specific task, please contact your administrator.

6.2 Detail block "Description"

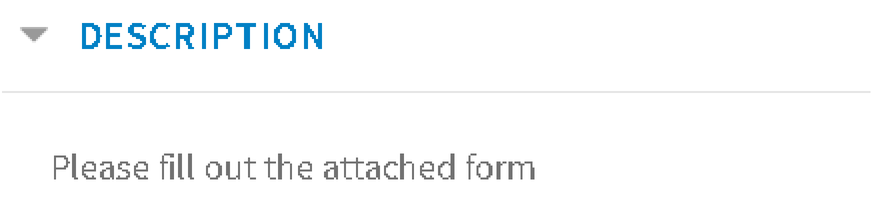

Fig. 6.3: Detail block "Description"

The *Description* contains a detailed description of the task. In individual cases this also includes relevant metadata or interactive elements.

6.3 Task-specific detail blocks

Depending on their type, tasks can also include special blocks. The figure shows a form for a workflow task as an example.

6.4 Related objects

Note: Related objects are not defined for every task. They are only displayed if they have been set up for the respective task type.

Between the *Description* and the *Activities* any number of blocks of related objects can be displayed. Each block is labeled with the name of the relationship (e.g. *Documents* or *Checklist Items*) and initially displays the first four objects. If more than four objects exist, only the first three and a *More…* link are displayed. Click *More…* to display all objects.

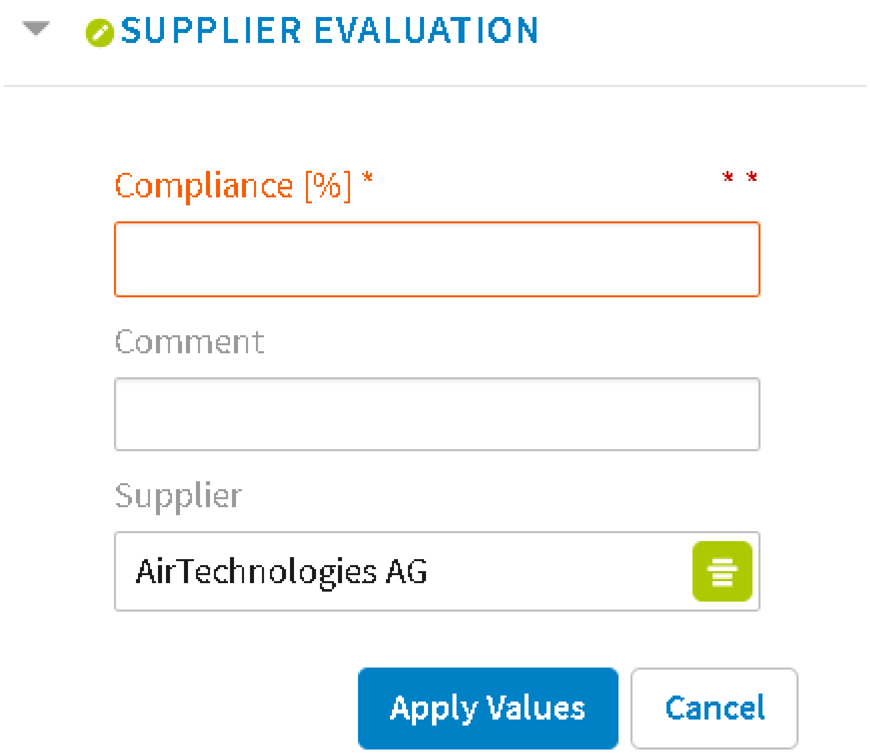

Fig. 6.4: Form of a workflow task

Fig. 6.5: Related objects to the task

6.5 Detail block "Activities"

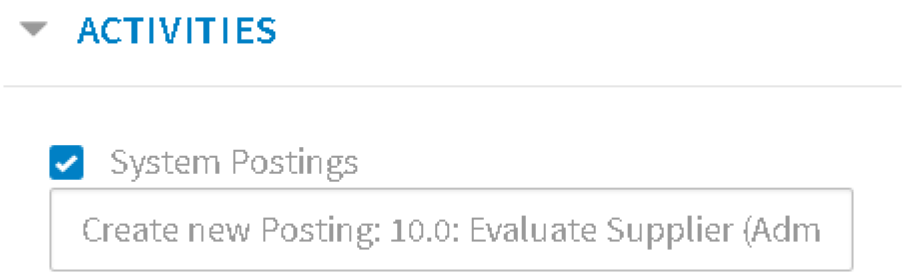

Fig. 6.6: Detail block "Activities"

In the *Activities* of a task, you can view past activities in the context of the task and write new postings.

Depending on the task type, the activities relate to different hierarchy levels of the task that are predefined administratively. In this way, activities could refer to either the task itself or its parent workflow or project.

Further details on activities can be found in the user manual Activities.

List of Figures

List of Tables