opentext™

Tasks and Task Lists

OpenText™ Content Server

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Tasks and Task Lists
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Chapter 1

Working with Tasks and Task Lists

A Task List is a container that allows users to manage and track the details of individual and collective work assignments. A Task List can contain *Tasks*, *Milestones*, and *Task Groups*, and it can be added anywhere in Content Server. Using Task Lists to manage assignments in a Project is especially useful, since it allows the members of a Project to remain informed of a Task's status.

1.1 Adding and Managing Tasks

Tasks enable you to provide a user, or team of users, with a priority, a due date, and detailed instructions for completing an assignment. You must create a Task List before you add Tasks or Task Groups. You can add as many Tasks as necessary to another Task, to a Task List, or to a Task Group. A Task Group is used to organize a large number of related Tasks.

When you create a Task, you define attributes, such as assigning a Task to a user, assigning start and end dates, and adding Milestones. Milestones help track important deadlines throughout the course of a project or assignment. For more information about Milestones, see "Using Milestones" on page 9.

The following table describes attributes that are common to Tasks, Task Groups, and Milestones.

Attribute	Description
Assigned To	The user or group to whom the Task is assigned. You do not have to assign a Task, but if you do, that user or group must have at least the Write permission.
Start Date	The date when the Task was created or the date work should begin.
Due Date	The date when the Task should complete. You can create a Task without specifying a due date.
Priority	You can specify a Task as *high*, *medium*, or *low* priority.
Status	You can specify a Task as *pending*, *in process*, *issue*, *on hold*, *completed*, or *cancelled*. If the Task is completed, it still displays on the Task List.
Milestone	The Milestone that is associated with the Task.
Instructions	An optional attribute that allows you to specify instructions for completing the Task.
Comments	An optional attribute that allows assignees to add comments about the Task.

Attribute	Description
Attachments	This attribute appears in a separate section and is available only when a Task has documents or other items attached to it, such as Polls, Shortcuts, and URLs.

If you do not define the attributes when you first add a Task, you can do so at a later time by editing the Task. You can edit single or multiple Tasks within Task Lists, Task Groups, and Milestones. When you add a Task List, Task, or Task Group, you can provide a description for the Task List or Task Group, modify Categories and Attributes, and add the Task List to a different container. For more information, see *OpenText Content Server - Get Started (LLESRT-UGD)*.

Your role as a Task creator or assignee determines the functions that you can perform on Tasks. The creator of a Task can modify all attributes; the user to whom a Task is assigned can view the Task, modify its status, and add or edit comments.

If a Task is part of a Project, all participants of the Project can view the Task's information; however, only the Project Coordinator can modify Task information.

You can access specific information about Tasks and Task assignees on various information pages. For example, you can access information about items in a Task List on the Task List Summary page. For more information about the details these pages provide, see . If you want to view or print a Task without scroll bars, text boxes, or lists, enable Printer Friendly View.

When a Task, Task Group, or Milestone are initially created, attachments can be added directly or they can be linked to another location on Content Server. If attachments are added after the creation of a Task, Task Group, or Milestone, items can be added by using **Add Item** for a document on a local system, or **Shortcut** to link to an item on Content Server.

Task Groups

A Task Group is a container inside a Task List that helps you organize a large number of related Tasks. Task Groups also allow you to perform functions on large groups of Tasks at one time. You can add multiple Tasks to a Task Group and multiple Task Groups to a Task List. Task Groups can be assigned to different users and given separate Milestones. When you add a Task Group, you can assign a Milestone to that group of Tasks. You can also modify the Task Group's Categories and Attributes and add the Task Group's Task List to a different container.

Note: It is easier to add Tasks to a Task Group than to assign a Task Group to existing Tasks. If you plan to use a Task Group to organize a Task List, create the Task Group first, and then add Tasks.

1.1.1   To Add a Task List

To add a Task List:

1. On the **Add Item** menu, click **Task List**.

2. On the **Add: Task List** page, type a name for the Task List in the **Name** box.

3. Optional Specify any other general item settings.

4. Click **Add**.

1.1.2   To Add a Task

To add a Task:

1. Click a **Task List**, **Task**, or **Task Group** link.

2. On the **Task List**, **Task**, or **Task Group** page, on the **Add Item** menu, click **Task**.

3. On the **Add: Task** page, type a name for the Task in the **Name** box.

4. Click *High*, *Medium*, or *Low* in the **Priority** list.

5. Click a status in the **Status** list.

6. Optional Specify any other general item settings as described in the following table.

7. Click **Add**.

Setting	Steps
Assign a Task	In the **Assigned To** area, click the **Choose User or Group** button 🗋... Navigate to a user or group, click the **Select >** link.
Specify start and due dates for the Task	In the **Start Date** and **Due Date** lists, click a month, date, year, and time. By default, the date on which you create the task will be placed in the start date.
Specify a priority	In the **Priority** list, click **Low**, **Medium**, or **High**. The default selection is **Medium**.
Specify a status	In the **Status** list, click **Pending**, **In Process**, **Issue**, **On Hold**, **Completed**, or **Cancelled**. The default selection is **Pending**.
Assign a Milestone to a Task	If Milestones have been created, you will be able to click a Milestone in the **Milestone** list.
Add instructions or comments for the Task	Type information in the **Instructions** and **Comments** text boxes.

Setting	Steps
Add a Content Server Attachment	In the **Add Content Server Attachment** area, click **Browse Content Server**. Click the **Select >** link for any item you want to attach to your Task.
Add a Desktop Attachment	In the **Add Desktop Attachment** area, click **Browse**. Navigate to the file on your computer you want to attach, highlight the file and click **Open**.
Assign a Category	In the **Categories** area, click **Edit**. In the **Edit Categories** window, click **Add Categories**. If your administrator has created categories, navigate to the category and click the **Select >** link next the category you want to assign to this Task. Click **Done**.

1.1.3   To Add a Task Group

To add a Task Group:

1.   Click a **Task List** or **Task Group** link.

2.   Click **Add Item**, select **Task Group**.

3.   On the **Add: Task Group** page, type a name for the Task Group in the **Name** box.

4.   Optional Add a description of the new Task Group in the **Description** box.

5.   Optional Click a Milestone in the **Default Milestone for Tasks** list to assign a Milestone to the Task Group.

6.   Optional In the **Categories** area, click **Edit** to select a Category to apply to this Task Group.

7.   Click **Add**.

1.1.4   To Edit a Task

To edit a Task:

1.   Click a Task's **Functions** menu, and then click **Edit**.

2.   Modify any available attributes, and then click the **Update Task** button.

1.1.5 To Edit Attributes of a Task, Task List, Task Group, or Milestone

To edit attributes of a Task, Task List, Task Group, or Milestone:

1. Click a Task, Task List, Task Group, or Milestone's **Functions** menu, and then click **Edit Items**.

2. On the **Edit Items** page, select the check box for each attribute you want to modify in the **Change** column.

3. Select the check box for each item you want the changes to apply to in the **Apply To** column.

4. Click **Update**.

1.1.6 To Enable Printer Friendly View

To enable Printer Friendly View:

• Click a Task's **Functions** menu, and then click **Printer Friendly View**.

1.2 Using Milestones

A Milestone represents a target date in a project's development process, such as a deadline for completing certain tasks. Milestones help track the status and target dates for all Tasks assigned to a specific Milestone. You can view facts and statistics about Milestones and the Task Lists, Tasks, and users associated with Milestones on various information pages. For more information, see "Viewing Task List Information" on page 11.

You specify a target date for a Milestone when you add it. This is known as the *original* date. If you need to modify the original date, click Milestone's function menu, select **Properties**, and then **Specific**. You will be taken to a screen which will allow you to edit the original date of the Milestone. You can assign and modify *current* and *actual* Milestone dates after the Milestone is created. The current date is the date specified as the target completion date; the actual date is the date that the task was or will be completed. When you add a Milestone, you can also provide a description of the Milestone, modify its Categories and Attributes, and add the Milestone's Task List to a different container. For more information, see *OpenText Content Server - Get Started (LLESRT-UGD)*.

The most efficient way to assign a Milestone to a Task or Task Group is adding it to the Task List before adding a Task or Task Group. However, you can assign Milestones or change previously assigned Milestones at a later time by editing the Milestone attribute. When you edit Tasks associated with a Milestone, you can modify any of the available attributes for the Task or Tasks to which the Milestone is assigned. For more information about attributes associated with Milestones and Tasks, see "Adding and Managing Tasks" on page 5.

1.2.1   To Add a Milestone

To add a Milestone to a Task List:

1. Click a Task List link.

2. On the Task List page, click **Add Item**, and then click **Milestone**.

3. On the **Add: Milestone** page, type a name for the Milestone in the **Name** box.

4. The **Target Date** lists have the current month, date, year, and time selected by default. Optionally, click a month, date, year, and time in the **Target Date** lists to specify the Task's target completion date.

5. By default, the **Create In** box contains the name of the Task List you selected in the first step. To change the Task List within which you will create this Milestone, in the **Create In** area, click **Browse Content Server** to select another Task List.

6. Optional Add a description of the new Milestone in the **Description** box. Also, in the **Categories** area, click **Edit** to select a Category to apply to this Milestone.

7. Click **Add**.

1.2.2   To View a Milestone

To view a Milestone in a Task List:

1. Click a Task List link.

2. On the Task List page, in the **Milestones** section, click a Milestone link.

1.2.3   To Assign Milestone Dates

To assign Milestone dates:

1. Click a Task List link.

2. In the **Milestones** section on the Task List page, click the **Edit** button.

3. Click a month, date, year, and time in the **Current Date** and **Actual Date** lists for each Milestone that you want to modify.

4. Click **Update**.

1.3 Viewing Task List Information

You can view information about Task Lists, Tasks, Milestones, and Assignees on the following information pages:

- Task List Summary, which provides summary information for all items in a Task List.

- Milestone Information pages, which provide information about individual Milestones and Milestones in a Task List.

    The **Tasks Not In Any Milestones** page is accessible from the **Milestone Information** page.

- Detail Resource List, which provides a summary of every user or group in a Task List that has assigned Tasks.

    The **Assignees Detail** page is accessible from the **Detail Resource List** page.

> **Note:** Only a Task's creator, a Project Coordinator, and a Task's assignee can modify information in a Task List and on its information pages.

To View Information Pages

The following table describes how to view the different types of information pages.

Page	How to View
Task List Summary page	Click a Task List link. You will be taken to that Task List's page. Click **Summary** on the **Task List** menu.
Detail Milestone List page	Click a Task List link. You will be taken to that Task List's page. Click **Detail Milestone List** on the **Task List** menu.
Tasks Not in Any Milestones page	On the **Detail Milestone List** page, click the **Tasks Not in Any Milestones** link.
Detail Resource List page	Click a Task List link. You will be taken to that Task List's page. Click **Detail Resource List** on the **Task List** menu.
Assignee Detail page	On the **Detail Resource List** page, click the **View Detail** button located in the **Assignee** area.

1.3.1   Task List Summary

To view the **Task List Summary** page, see "To View Information Pages" on page 11. The **Task List Summary** page contains the following information:

- **Number of Tasks**, the total number of Tasks in the Task List.

- **Percent Complete**, the percentage of Tasks completed to date.

- **Number of Milestones**, the total number of Milestones in the Task List.

- **Completed Milestones**, the number of Milestones completed to date.

- **Current Milestone**, the Milestone assigned to the current Task.

- **Resources**, the number of users and groups assigned to the Task List.

- **Duration**, the number of days that have passed since the Task List was created.

- **Pending**, the percentage and total number of Tasks that are *pending* for the Task List.

- **In Process**, the percentage and total number of Tasks that are *in progress* for the Task List.

- **Issue**, the percentage and total number of Tasks that are an *issue* for the Task List.

- **On Hold**, the percentage and total number of Tasks that are *on hold* for the Task List.

- **Completed**, the percentage and total number of Tasks that are *completed* for the Task List.

- **Cancelled**, the percentage and total number of Tasks that are *cancelled* for the Task list.

The Task List Summary also contains the following sections:

- **Milestones**, which is a list of the Milestones in the Task List.

- **Resources**, which provides a summary of Task and Milestone information for each user or group in the Task List.

1.3.2   Milestone Information Pages

Viewing any Milestone's page provides information about a specific Milestone. For further information about viewing a Milestone's page, see "To View a Milestone" on page 10. More detailed information about a Task List's Milestones can be viewed from the **Detail Milestone List** which provides information for each Milestone in a Task List.

To view the **Detail Milestone List** page, see "To View Information Pages" on page 11.

The **Tasks Not in Any Milestones** page is linked from the **Detail Milestone List** page. It lists each individual Task that does not have a Milestone assigned to it, and

provides summary information for the entire group of Tasks that are not associated with Milestones.

> **Note:** The **Tasks Not in Any Milestones** link will not appear when all Tasks have Milestones assigned to them.

Each information page provides the following details for individual Tasks or a group of Tasks associated with a Milestone:

- **Original Date**, the original target date for completing the Task.
- **Current Date**, the current target date for completing the Task.
- **Actual Date**, the date the Milestone was completed.
- **Number of Tasks**, the total number of Tasks, and the number of Tasks that are late in the Task List.
- **Percent Complete**, the percentage of Tasks completed to date.
- **Resources**, the number of users and groups assigned to the Task List.
- **Duration**, the number of days that have passed since the Task List was created.
- **Pending**, the percentage and total number of Tasks that are *pending* for the Task List.
- **In Process**, the percentage and total number of Tasks that are *in progress* for the Task List.
- **Issue**, the percentage and total number of Tasks that are an *issue* for the Task List.
- **On Hold**, the percentage and total number of Tasks that are *on hold* for the Task List.
- **Completed**, the percentage and total number of Tasks that are *completed* for the Task List.
- **Cancelled**, the percentage and total number of Tasks that are *cancelled* for the Task List.

1.3.3   Detail Resource List

To view the **Detail Resource List** page, see "To View Information Pages" on page 11.

The **Assignees Detail** page is accessible from the **Detail Resource List** page, see "To View Information Pages" on page 11. The **Assignees Detail** page provides a summary of the assignments for a specific user or group, and lists all assignments. It provides the same information as the **Detail Resource List**, but the information is specific to that assignee. This page also provides a list of the Tasks assigned to that user.

The **Detail Resource List** contains the following information:

- **Assignee**, the names of the users and groups assigned a Task.

- **Number of Tasks**, the total number of Tasks assigned to a user, and the number of Tasks that are late.

- **Percent Complete**, the percentage of Tasks that are completed to date.

- **Milestones Involved**, the total number of Milestones allocated to all Tasks assigned to a user.

- **Pending**, the percentage and total number of Tasks that are *pending* for the Task List.

- **In Process**, the percentage and total number of Tasks that are *in progress* for the Task List.

- **Issue**, the percentage and total number of Tasks that are an *issue* for the Task List.

- **On Hold**, the percentage and total number of Tasks that are *on hold* for the Task List.

- **Completed**, the percentage and total number of Tasks that are *completed* for the Task List.

- **Cancelled**, the percentage and total number of Tasks that are *cancelled* for the Task List.