Task Management (Pro)

(User Manual)

By

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Contents

Introduction

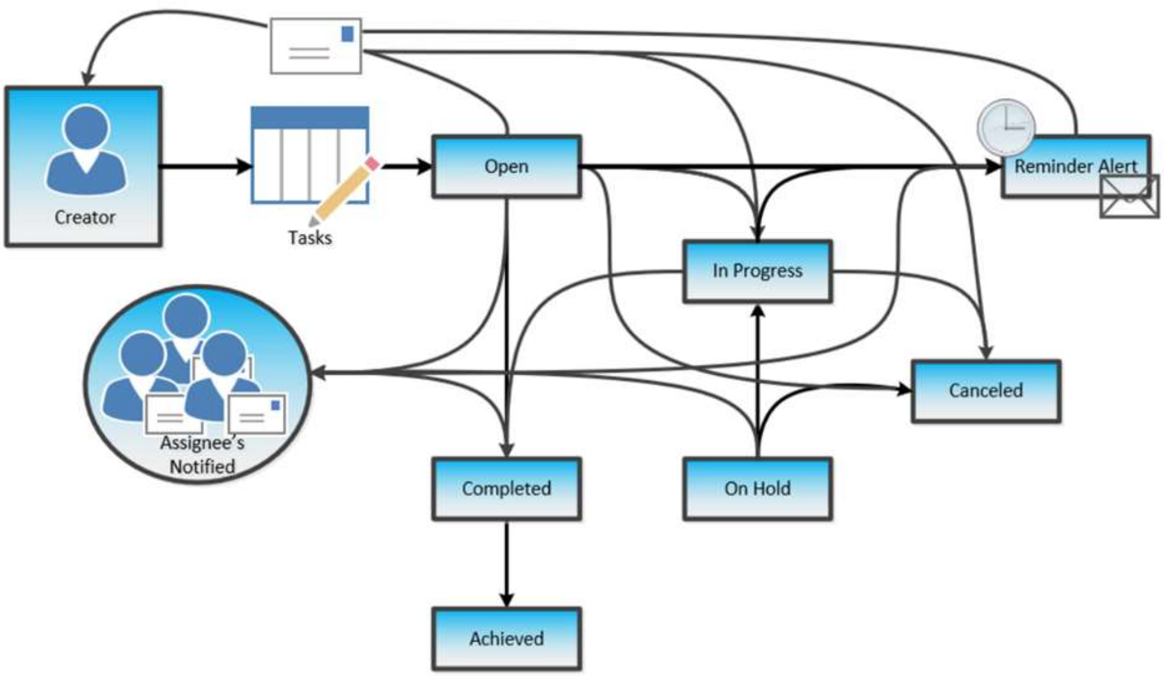
The introduction section of the document describes the scope and objective of Office 365 Chronodat Action Item and Task Management Add-in.

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.

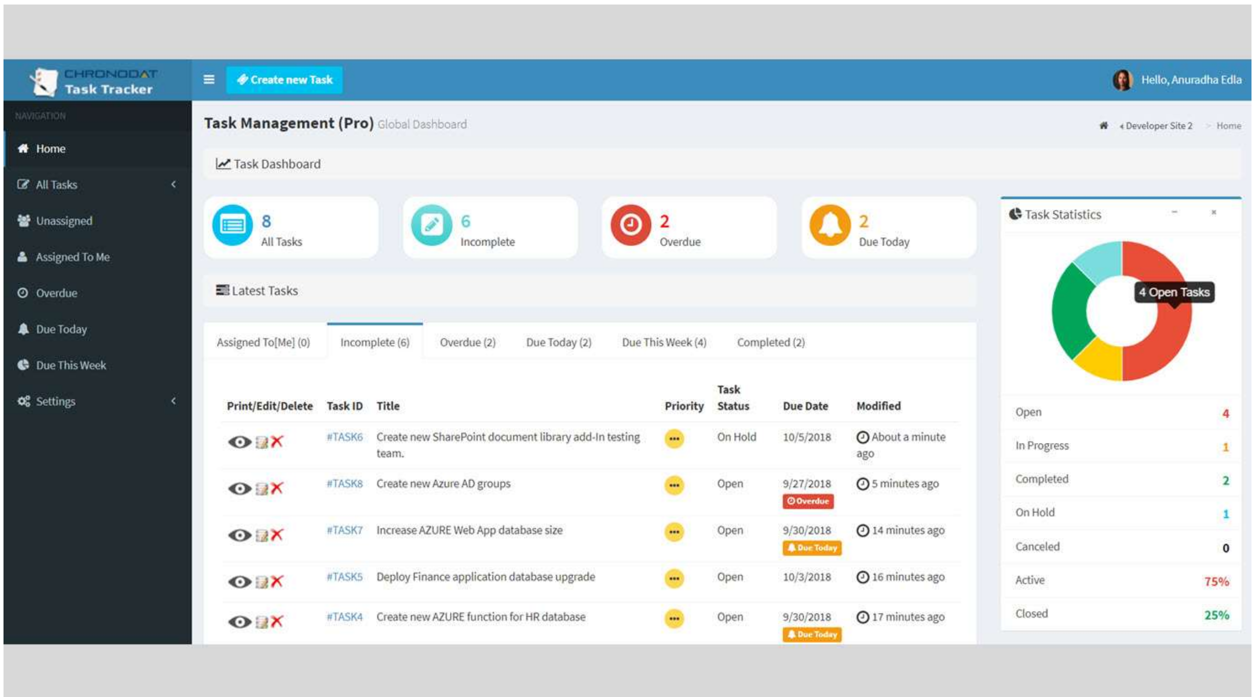
Chronodat Task Management (Pro) Process Workflow



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



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

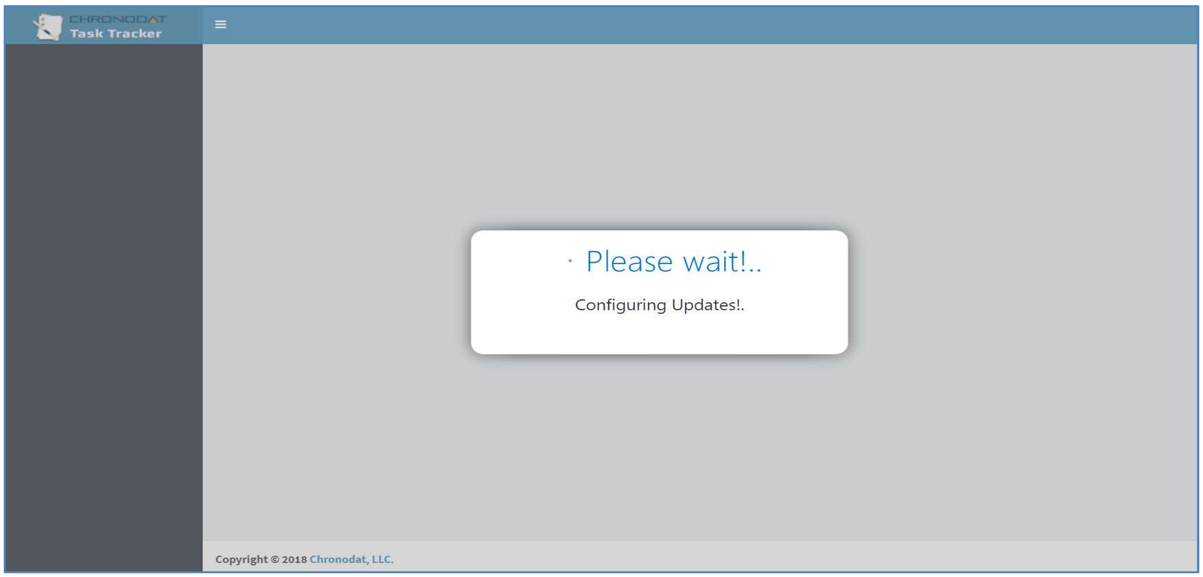
- Export options, such as Excel, PDF, CSV, and more

- Security is built-in, and user access is very customizable.

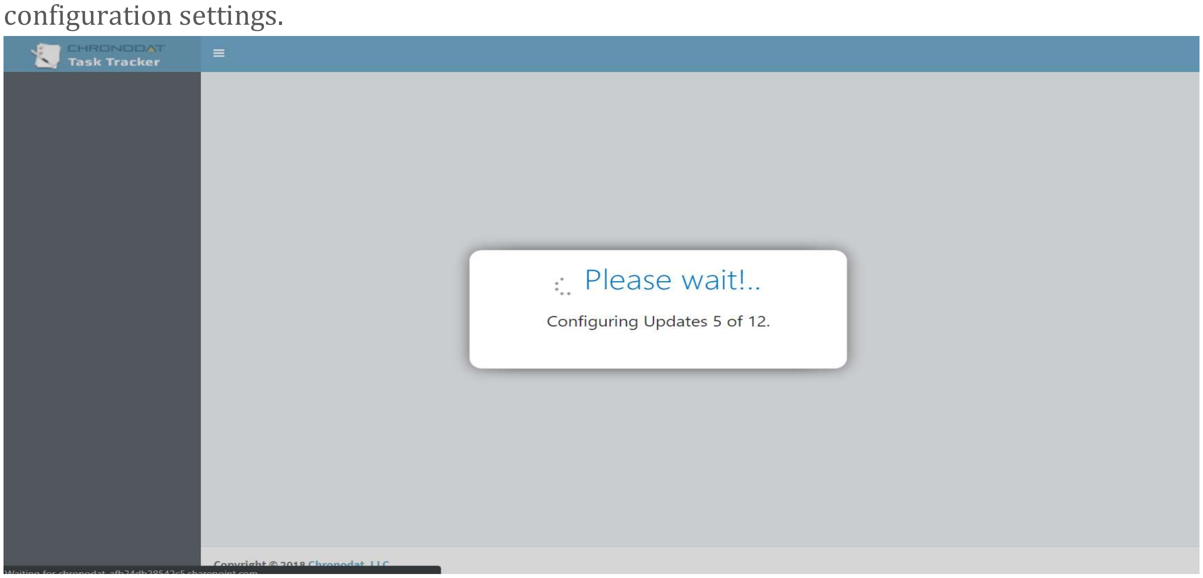
Add-in Configuration

1. Click **Task Management (Pro)**.

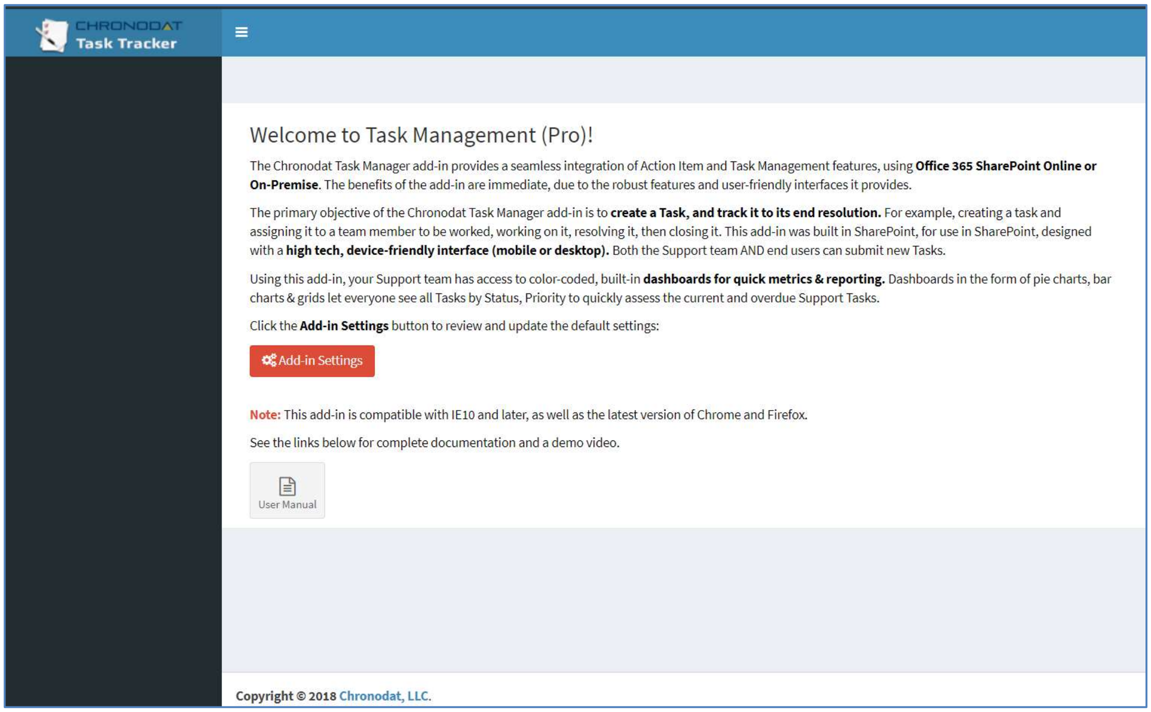
2. On the initial run, add-in setups the default settings. Please wait until configuration is complete.



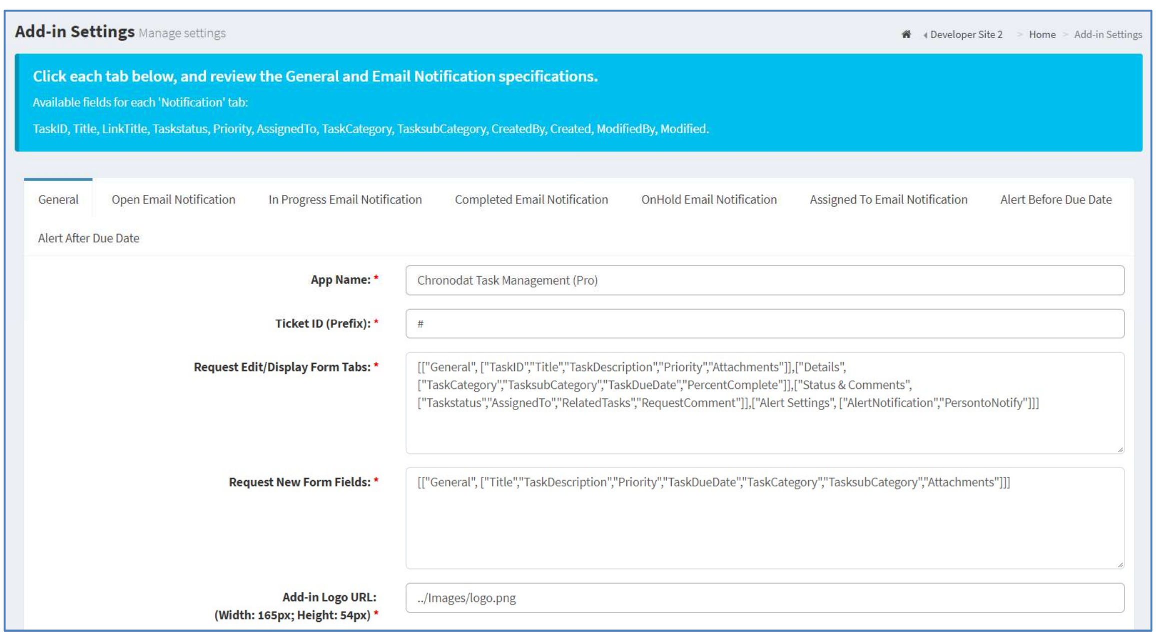
3. Typically, it would take around 30 seconds to 1 minute to complete the default configuration settings.



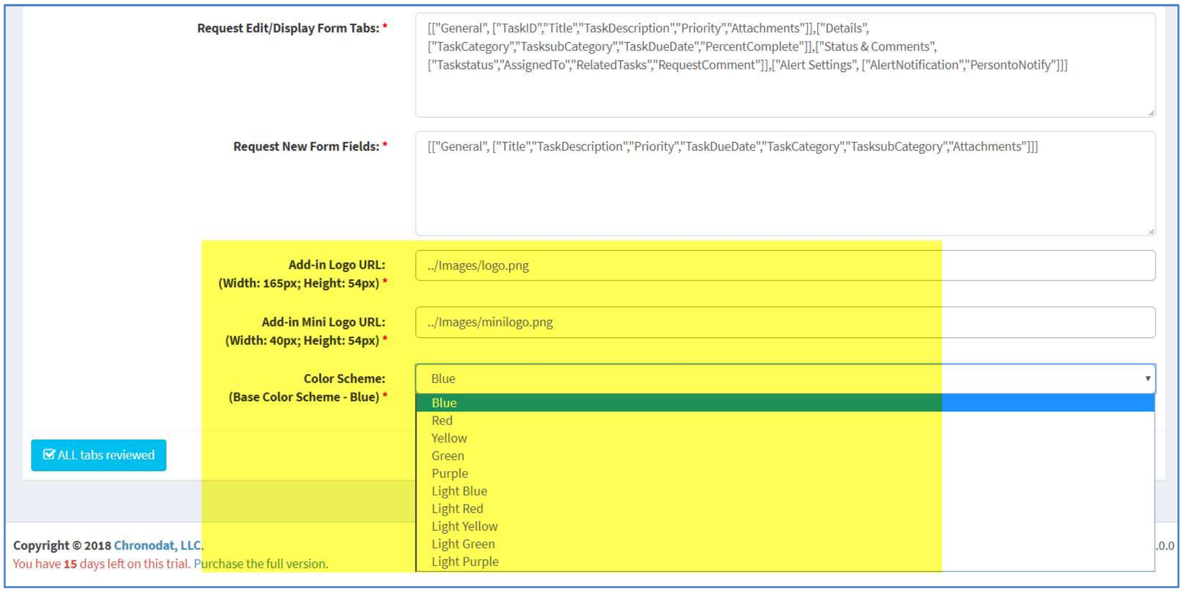
4. Click the red button to review the Add-in Settings.



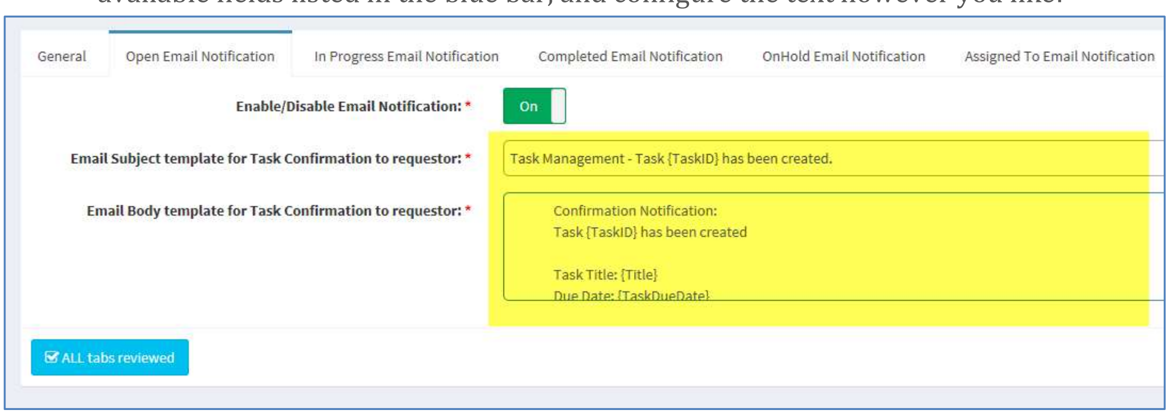
5. On the **General** tab, enter the name you want for your Task Management add-in (it will display on screens such as the Dashboard) and Task ID Prefix.



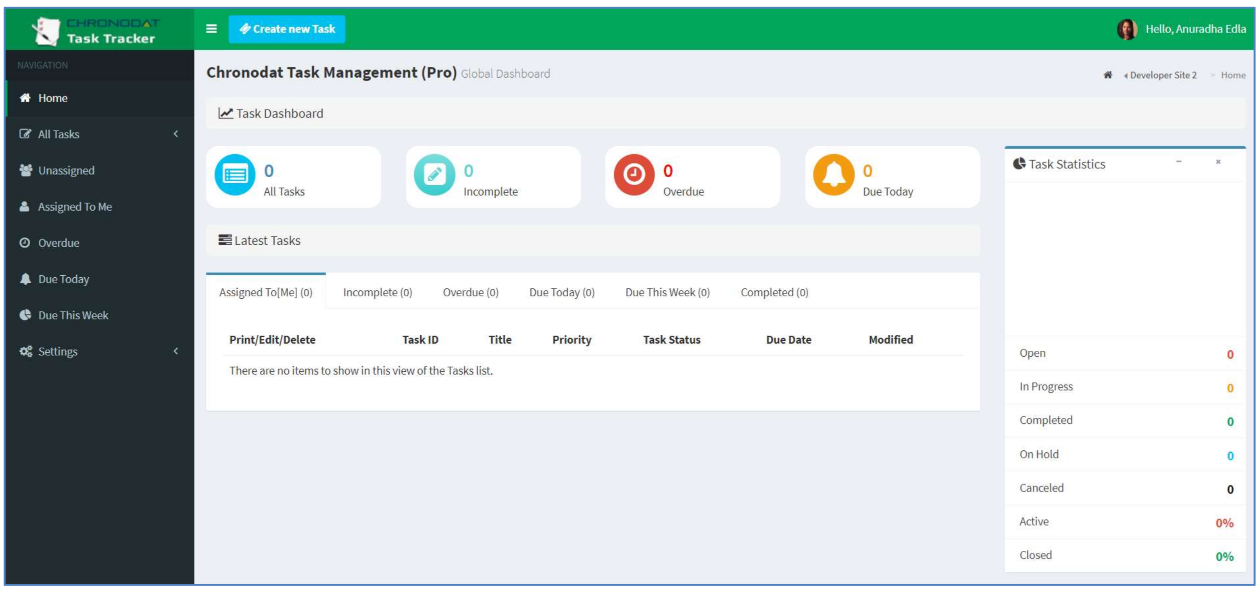
6. Change logo and Color Scheme.



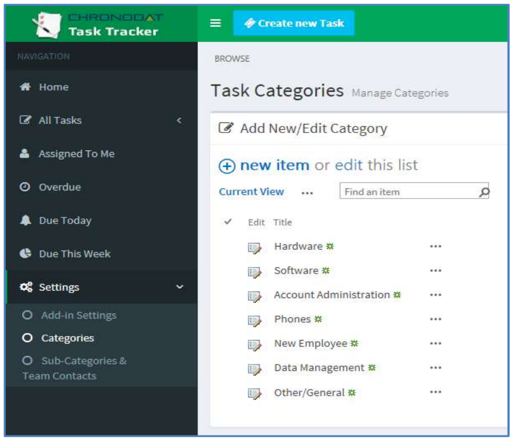
7. Click the next tab in sequence. You may be tempted to press **Save**, but you need to finish reviewing all the other tabs. If you do, however, click **Save**, you can always quickly get back to this screen by clicking **Settings > Add-in Settings**. This tab allows you to configure the email that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



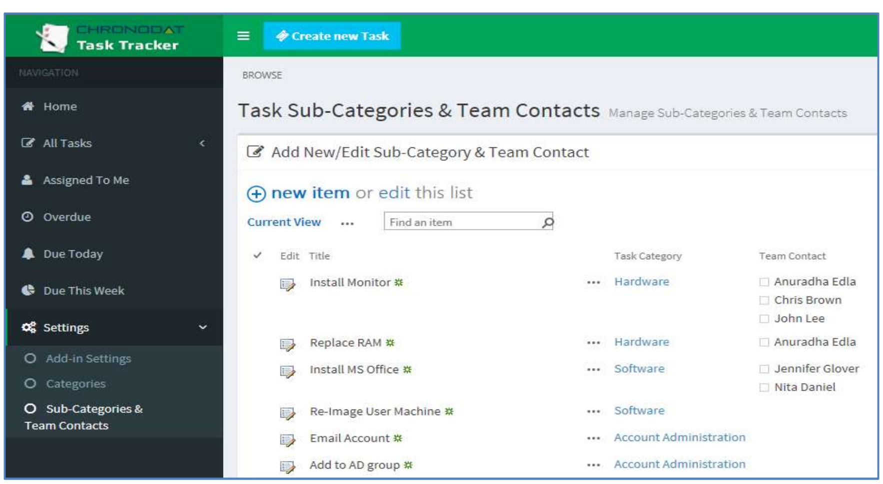
8. When finished, click the next tab in sequence. This tab is very similar, but it's for the email that the user sees when the Task has moved to In Progress.
    - Again, you can turn it off by clicking Disable.
    - Configure the subject line in this field. Remember you can use the available fields 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).



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.**



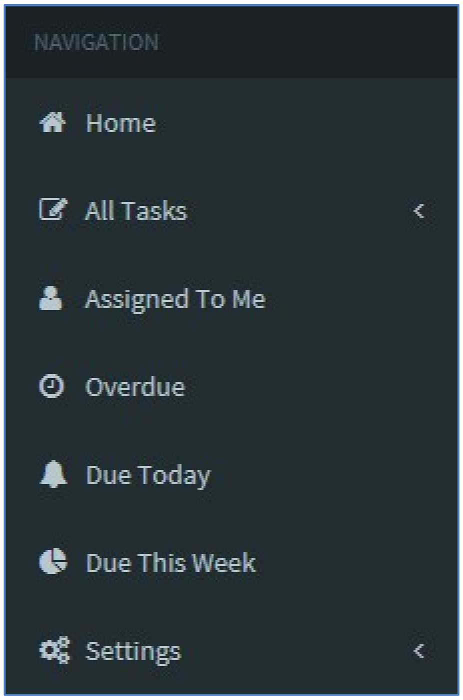
    - I'll now click **Edit this list.** To make changes, click the ellipses beside an item. I want **Other/General** to say just **Other**, so I'll click the ellipses beside it, **Edit Item**, remove the unwanted text, **Save**, then click **Stop editing this list.**
13. Next, you click **Sub-Categories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

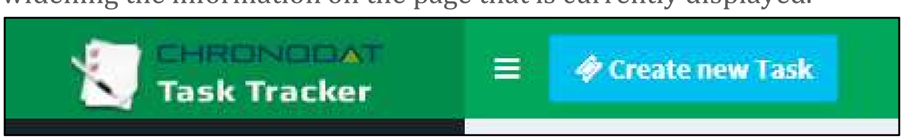


Navigating to the Dashboard

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.

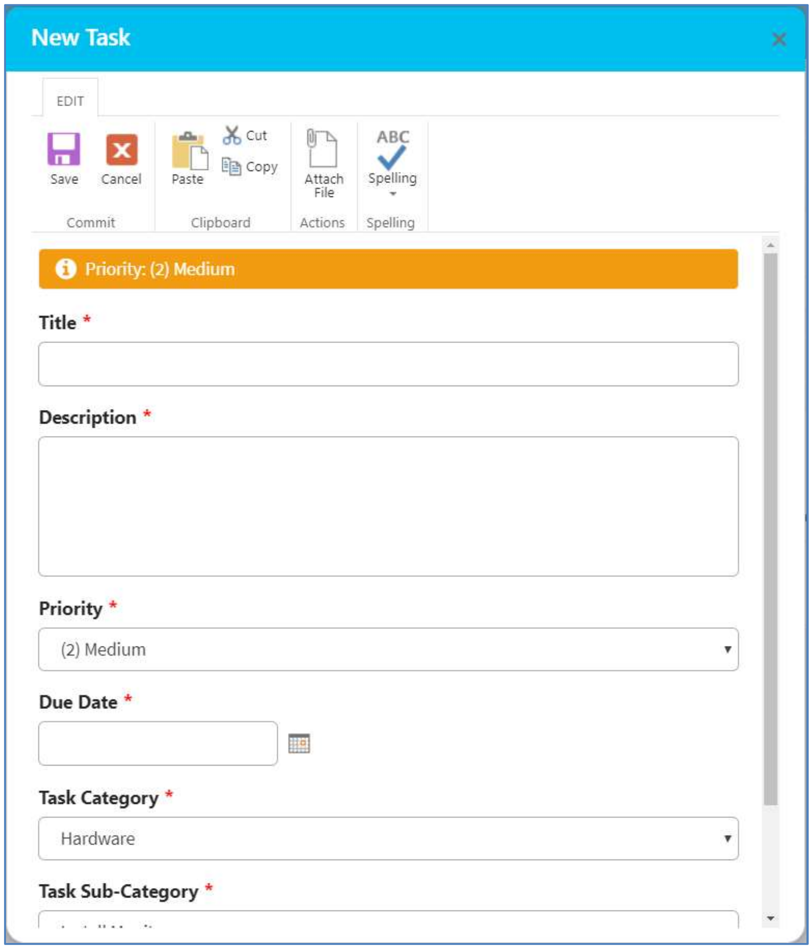
Hiding the Left Navigation

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**.



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.

TM

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

TM

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.

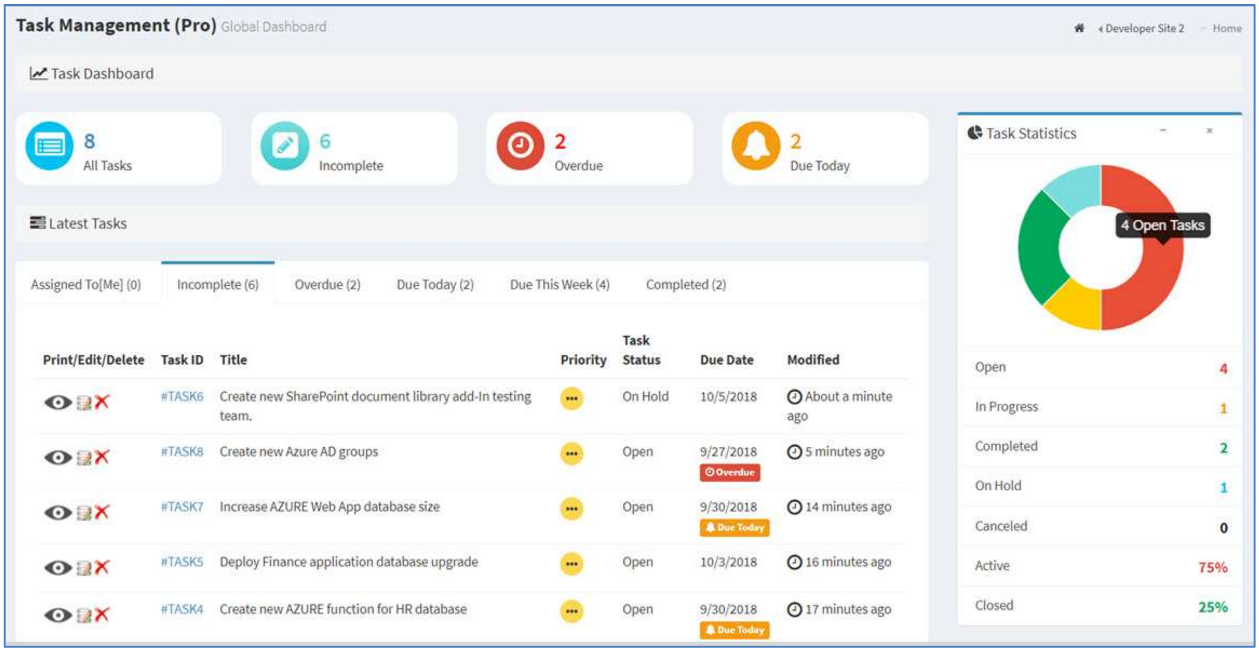
Status: In Progress
Category: Hardware
Priority: (2) Medium

To view the task details:
Install new monitor in Building 4 Cusbe #325

Dashboards

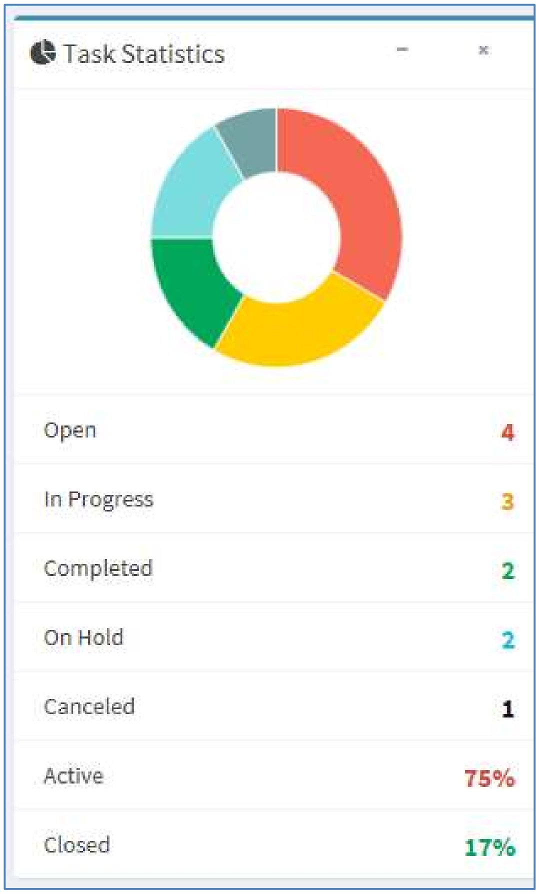
We understand the **importance of reporting**, so forget your Excel spreadsheets and the manual work of chasing down the Tasks. The Dashboards will give you your reporting statistics.

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

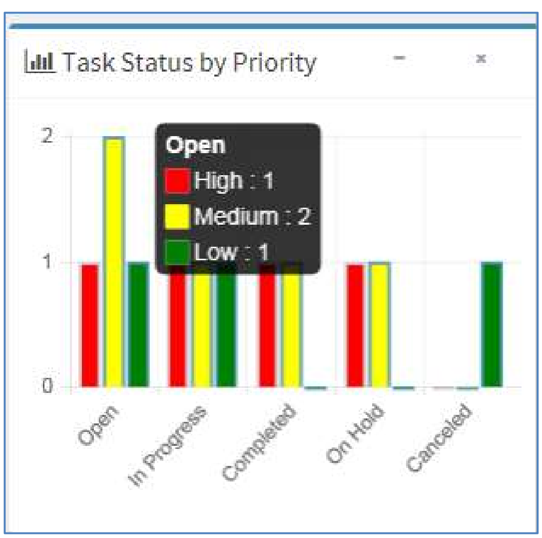


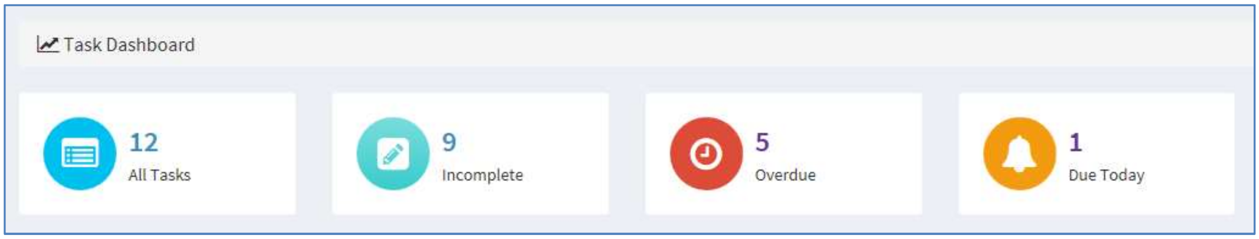
The large boxes on the top match the tabs below it. Scroll through the tabs to see the respective Tasks for each Status. The list contains the latest **10 Tasks** for each Status.

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**.

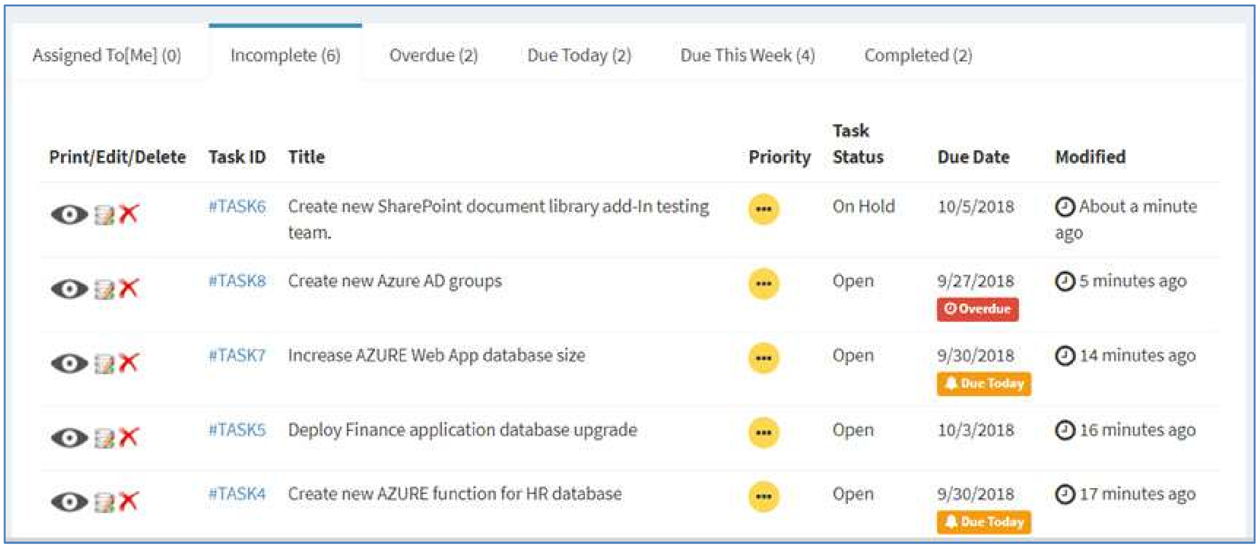


The **bar chart** gives you a quick assessment **by Priority** for each Status. Red indicates High, Yellow is Medium, and Green is Low priority. So for the Open status, 4 tickets are **High** priority. For **In Progress**, 3 are Low priority, and so on.



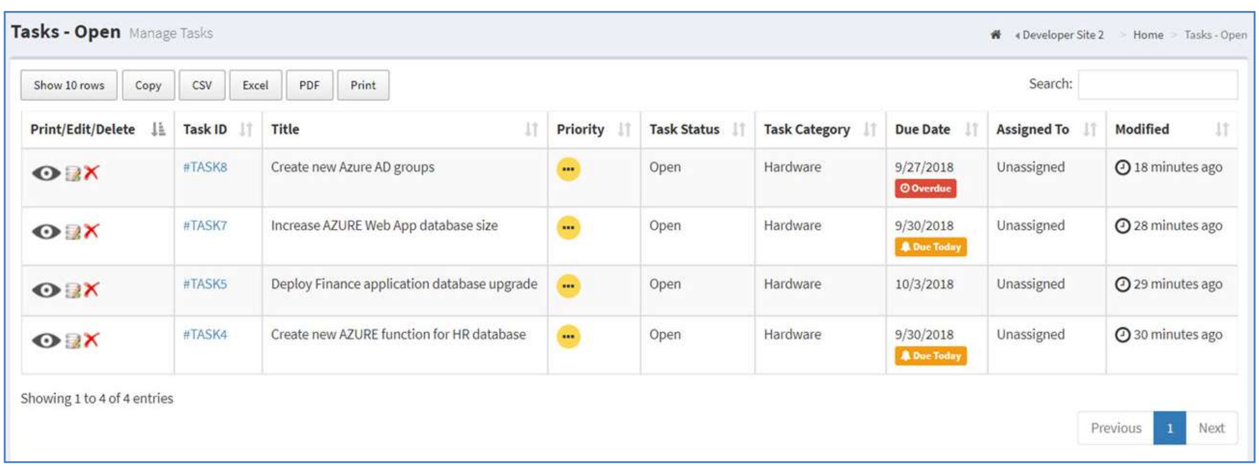


The list of Tasks in the middle is the latest **10 Tasks**. If you want to view **ALL Tasks** under a particular Status, click **View All** below it.



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 Overdue	5 minutes ago
	#TASK7	Increase AZURE Web App database size	•••	Open	9/30/2018 Due Today	14 minutes ago
	#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 Due Today	17 minutes ago

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.



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

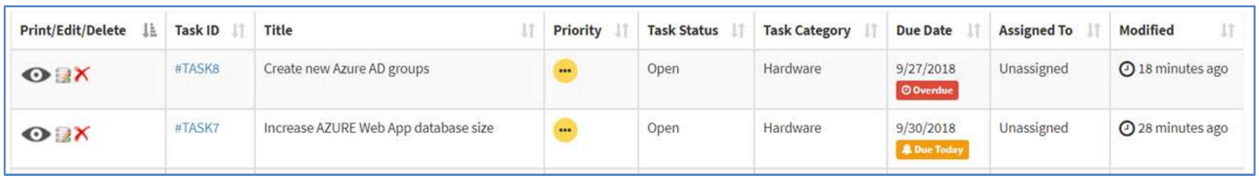
Notice the buttons at the top left. These are for exporting the grid.

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

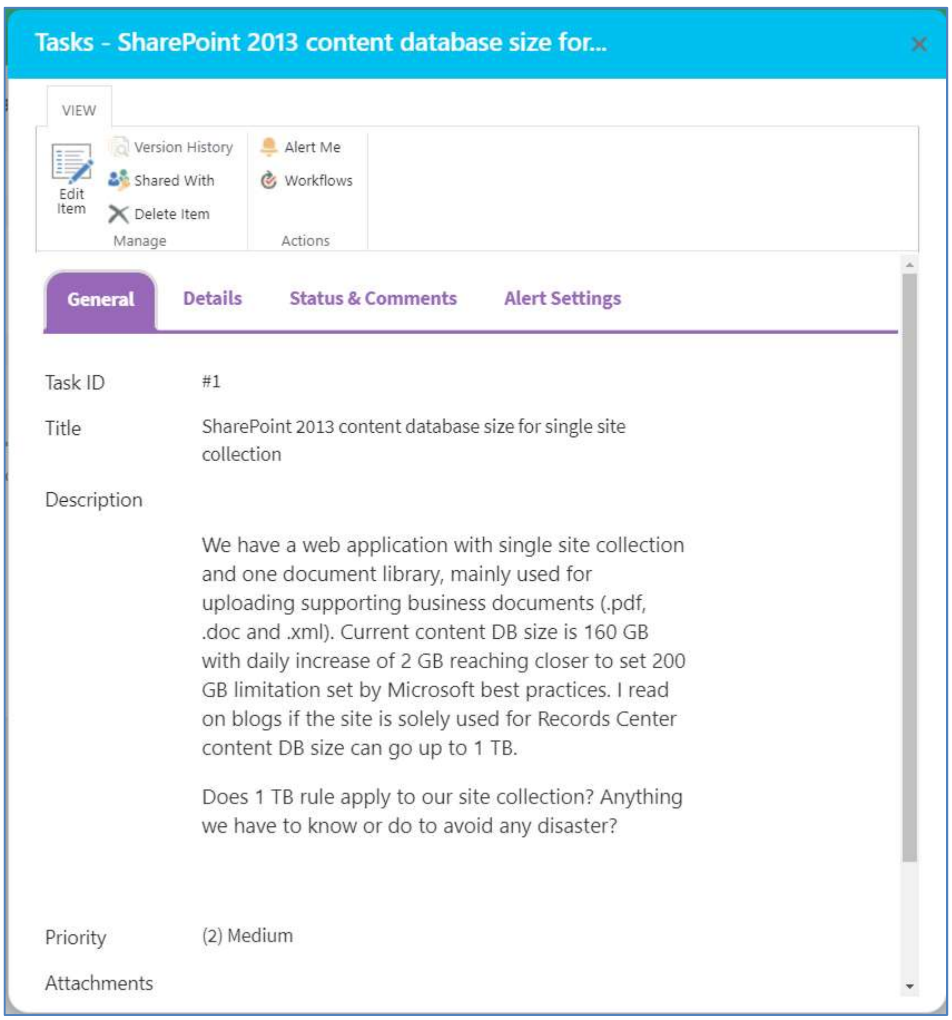
- **CSV** means comma-separated values, and is just the raw, unformatted data
- **Excel** puts the grid in an Excel file, so that you can take advantage of the filtering, and formatting features that Excel provides
- **PDF** exports the grid as a PDF file, and **Print** is for printing the grid

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.

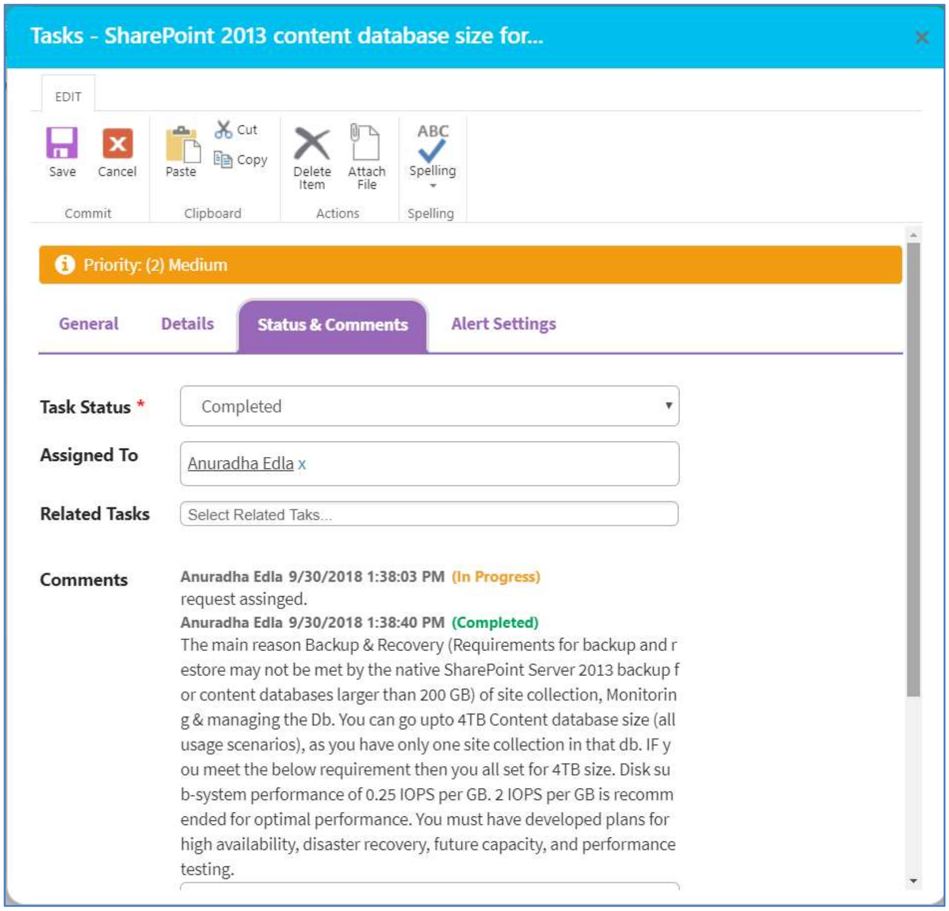


Print/Edit/Delete	Task ID	Title	Priority	Task Status	Task Category	Due Date	Assigned To	Modified
	#TASK8	Create new Azure AD groups	•••	Open	Hardware	9/27/2018 Overdue	Unassigned	18 minutes ago
	#TASK7	Increase AZURE Web App database size	•••	Open	Hardware	9/30/2018 Due Today	Unassigned	28 minutes ago

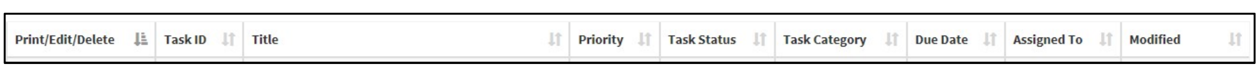


If you click **Task ID**, it takes you to the same form, but you're in **View** mode. You can, however, click **Edit Item** to make a change.

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

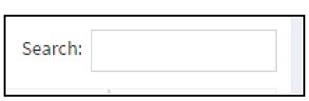


The column headings are sortable. Just click a heading. For example, let's say we want to sort the grid according to **Task Category**, so I'll click that heading. You can refine it further by Ascending or Descending order – just click the icon beside the heading.



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.



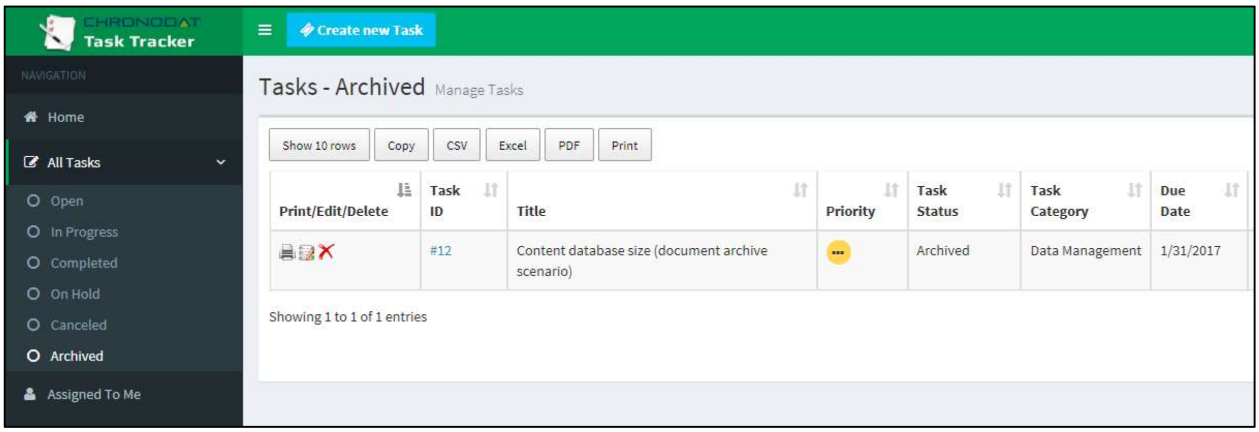
Archiving Tasks

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.



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.