

MADCAP FLARE ONLINE

Tasks Guide

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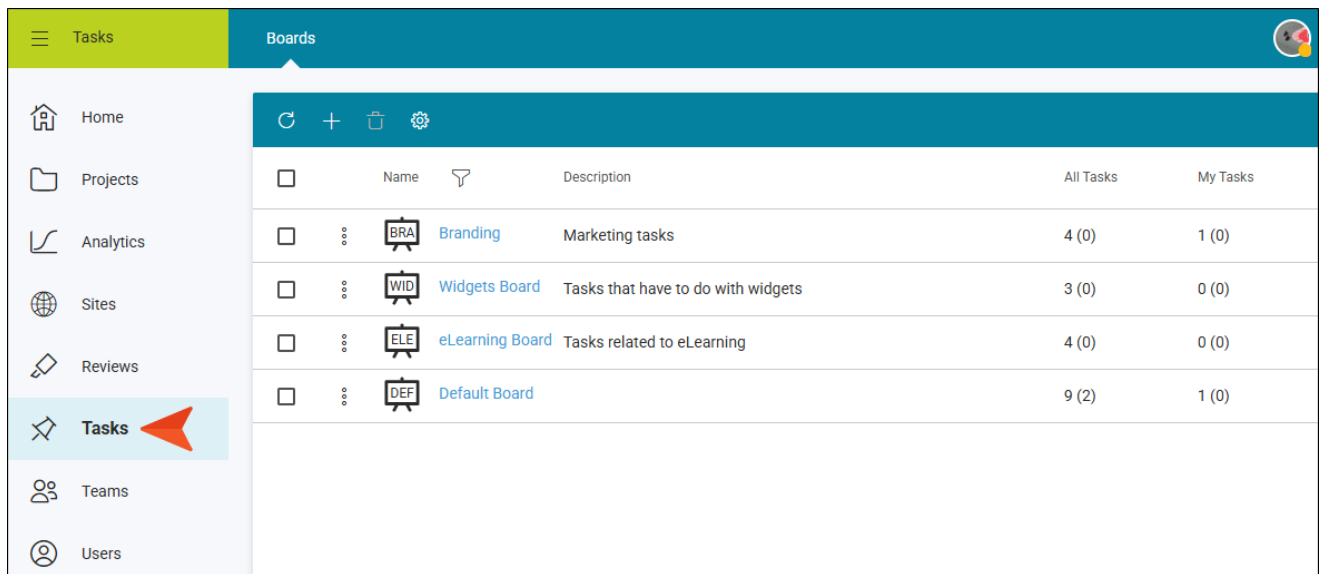
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CHAPTER 1

Introduction

The Tasks page lets you keep track of work that needs to be completed and visualize the work flow. When creating a task board and then tasks within it, you can provide various kinds of information.



The screenshot displays the 'Tasks' page interface. On the left is a navigation sidebar with icons for Home, Projects, Analytics, Sites, Reviews, Tasks (highlighted with a red arrow), Teams, and Users. The main content area is titled 'Boards' and contains a table of task boards. The table has columns for Name, Description, All Tasks, and My Tasks. Each row represents a board with a checkbox, a menu icon, and a board icon.

<input type="checkbox"/>	Name	Description	All Tasks	My Tasks
<input type="checkbox"/>	Branding	Marketing tasks	4 (0)	1 (0)
<input type="checkbox"/>	Widgets Board	Tasks that have to do with widgets	3 (0)	0 (0)
<input type="checkbox"/>	eLearning Board	Tasks related to eLearning	4 (0)	0 (0)
<input type="checkbox"/>	Default Board		9 (2)	1 (0)

Main Activities for Task Boards

- "Creating Task Boards" on page 8
- "Editing Task Boards" on page 12
- "Moving Tasks to Another Board" on page 13
- "Deleting Task Boards" on page 16

Main Activities for Tasks

- "Creating and Assigning Tasks" on page 19
- "Editing Tasks" on page 36
- "Moving Tasks" on page 40
- "Filtering Tasks" on page 47

Other Activities

- "Viewing Task Details" on page 52
- "Adding Comments to Tasks" on page 55
- "Viewing Task Activity" on page 60
- "Setting Notifications for Tasks" on page 62
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- "Board View" on page 68
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Main Activities for Task Boards

Some activities are particularly common and important when it comes to this feature.

This chapter discusses the following:

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Editing Task Boards	12
Moving Tasks to Another Board	13
Deleting Task Boards	16

I Creating Task Boards

Before creating any tasks, you must first have a task board to hold the tasks. In Flare Online, you can create multiple task boards. This lets you organize tasks according to projects or certain time periods (e.g., product releases).

Permission Required?


To create, edit, add comments to, or delete a task, you must have the following permission setting:

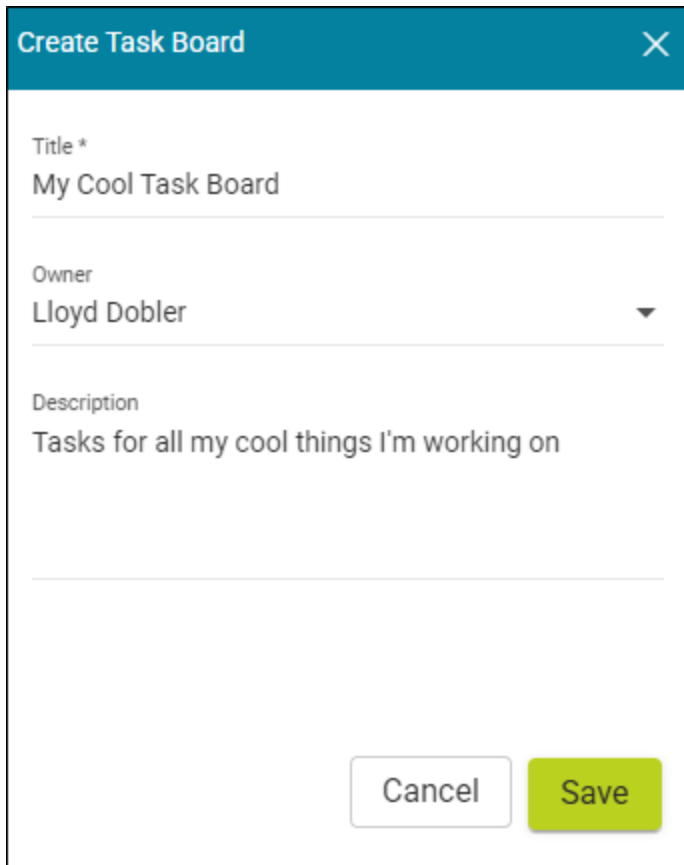


Without permission, you can only view tasks.

For more information about permissions, see the Help system.

How to Create a Task Board

1. On the left side of the interface, click **Tasks**.
2. In the toolbar click .
3. Enter a title for the task board. You can also assign the board to a particular user and provide a description.




Create Task Board ✕

Title *
My Cool Task Board

Owner
Lloyd Dobler ▼

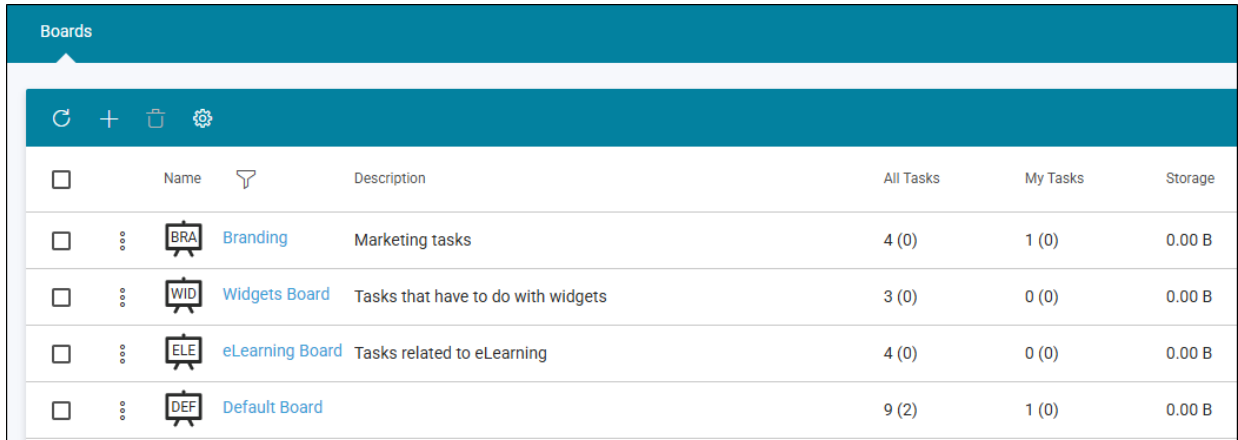
Description
Tasks for all my cool things I'm working on

Cancel Save





 **NOTE** If an owner is assigned to a task board, it simply indicates who is in charge of the overall board. It does not imply special permissions or restrictions for working within the board.


4. Click **Save**. The new board is added to the grid, which can show multiple columns of information about the board.

In the All Tasks and My Tasks columns, you will see two numbers. The first number indicates how many active tasks are associated with the board. The number in parentheses indicates how many inactive tasks are associated with the board; in other words, these are tasks that have been moved to either Backlog or Archive.

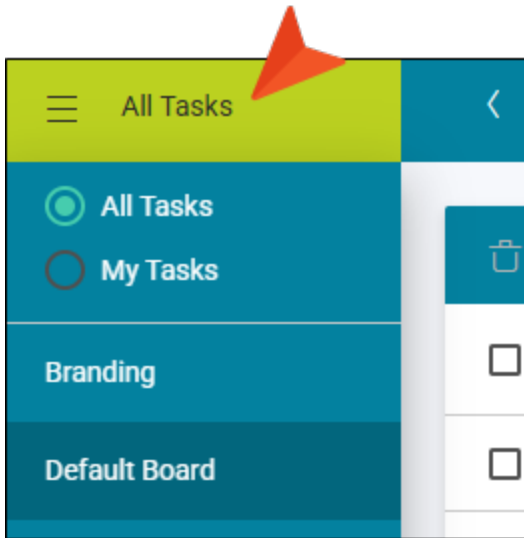


The screenshot shows a 'Boards' interface with a table listing various boards. The table has columns for Name, Description, All Tasks, My Tasks, and Storage. Each row represents a board with its name, description, and task counts.

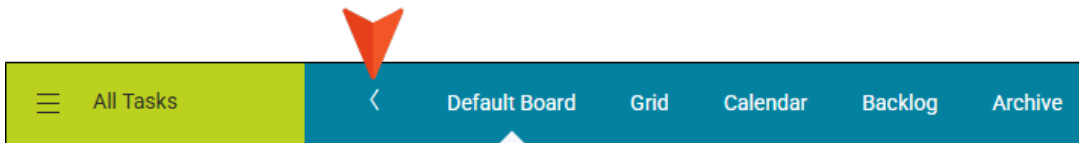
	Name	Description	All Tasks	My Tasks	Storage
<input type="checkbox"/>	 Branding	Marketing tasks	4 (0)	1 (0)	0.00 B
<input type="checkbox"/>	 Widgets Board	Tasks that have to do with widgets	3 (0)	0 (0)	0.00 B
<input type="checkbox"/>	 eLearning Board	Tasks related to eLearning	4 (0)	0 (0)	0.00 B
<input type="checkbox"/>	 Default Board		9 (2)	1 (0)	0.00 B

 **NOTE** The various page views associated with tasks (the board, Grid, Calendar, Backlog, Archive) are unique for each task board.

While viewing specific task board page views, you can click **All Tasks** for a flyout menu to quickly select and view another task board (in the same page view), or filter to see all tasks verses tasks assigned to you.



Also, a left arrow at the top lets you navigate back to the main grid listing all task boards.



Editing Task Boards

You can open and edit a Flare Online task board to make changes to it (e.g., name, description).

Permission Required?

To work with task boards or tasks (e.g., create, edit, add comments to, delete), you must have the following permission setting:

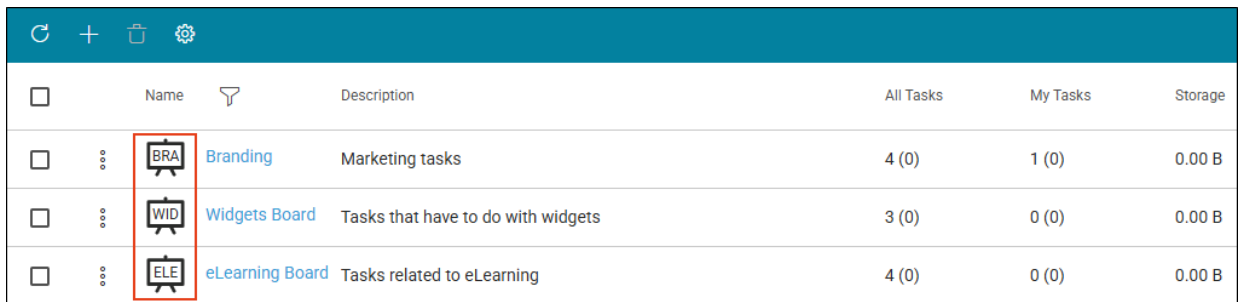





Without permission, you can only view tasks.

For more information about permissions, see the Help system.

How to Edit a Task Board

1. On the left side of the interface, click **Tasks**.
2. Click the icon next to the name of the task board.



<input type="checkbox"/>	Name	Description	All Tasks	My Tasks	Storage
<input type="checkbox"/>	 Branding	Marketing tasks	4 (0)	1 (0)	0.00 B
<input type="checkbox"/>	 Widgets Board	Tasks that have to do with widgets	3 (0)	0 (0)	0.00 B
<input type="checkbox"/>	 eLearning Board	Tasks related to eLearning	4 (0)	0 (0)	0.00 B

3. With **Settings** selected on the left side, you can make changes to the fields on the right (i.e., title, owner, description).
4. Click **Save**.

I Moving Tasks to Another Board

You can move one task at a time to another board. At this time, you cannot move multiple tasks to a board at the same time.

Permission Required?

To create, edit, add comments to, or delete a task, you must have the following permission setting:

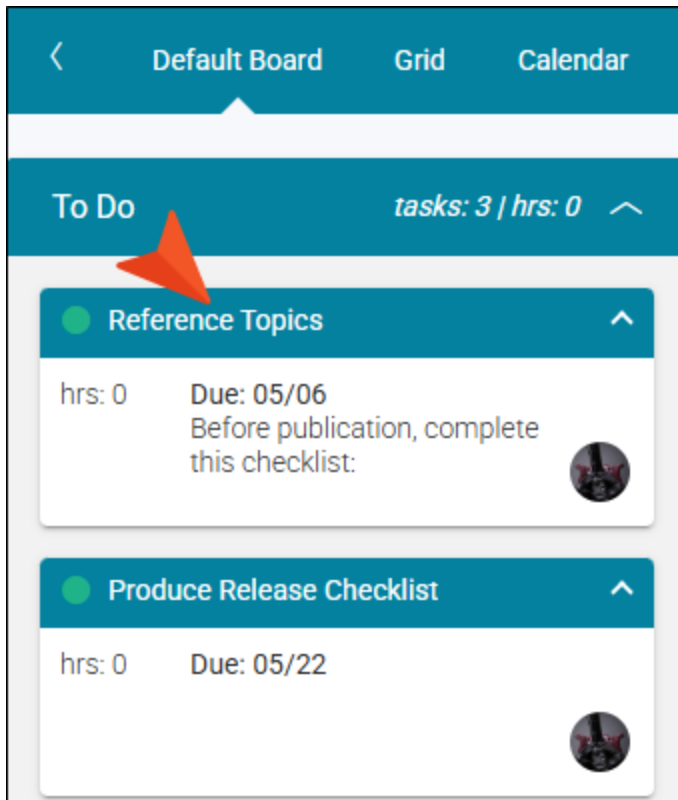


Without permission, you can only view tasks.

For more information about permissions, see the Help system.

How to Move a Task to Another Board

1. On the left side of the interface, click **Tasks**.
2. In the grid, select the name of a board to open it.
3. Locate the task card and click its name.



4. Click the **Task Board** drop-down and select a different board.

The screenshot shows a task details form with a teal header containing 'Details', 'Discussion', and 'Attachments' tabs, and a close button. The main title is 'Reference Topics' with 'Move' and 'Delete' links. The task is set to 'Low Priority' (indicated by a green dot) and 'Status: To Do'. The start date is '4/25/2025' at '12:00 AM' and the due date is '5/6/2025' at '12:00 AM'. The task duration is '0 hrs 1 pos'. There is an 'All Day Event' checkbox. A dropdown menu for 'Task Board' is currently set to 'Default Board' and is highlighted with a red rectangular box. At the bottom, 'Owner:' and 'Project:' labels are visible.

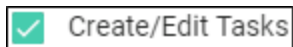
5. Click **Save**.

I Deleting Task Boards

Deleting a task board cannot be undone. All tasks in the board will also be deleted. However, any messages and references to the task board will be retained in the Tasks Activity.

Permission Required?


To create, edit, add comments to, or delete a task, you must have the following permission setting:

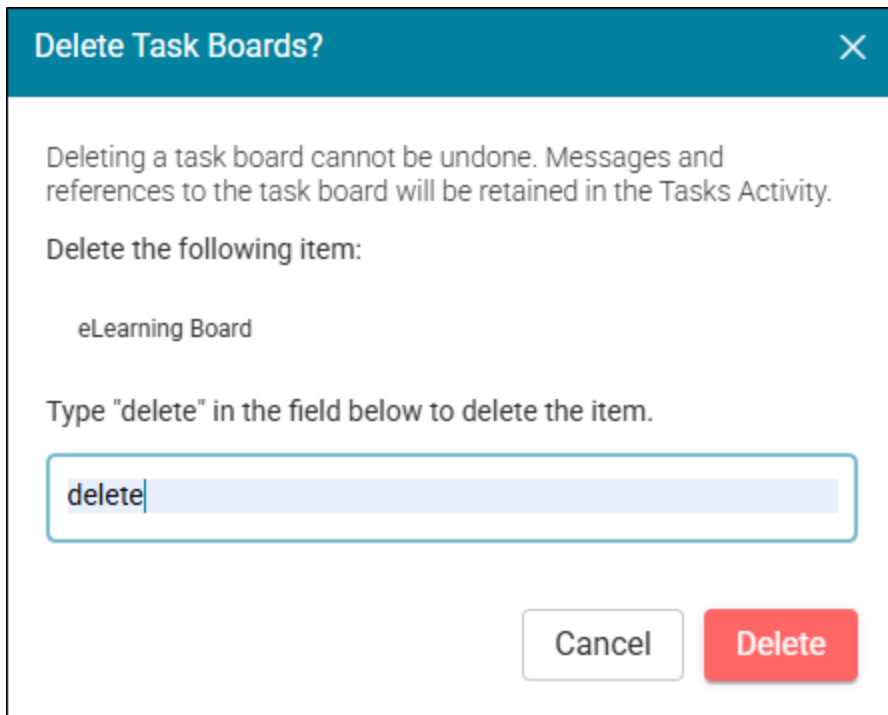


Without permission, you can only view tasks.

For more information about permissions, see the Help system.

How to Delete a Task Board

1. On the left side of the interface, click **Tasks**.
2. Click the check box next to the name of the task board.
3. In the toolbar click .
4. In the dialog, type `delete` in the field under the listed boards.



5. Click Delete.

CHAPTER 3

Main Activities for Tasks

Some activities are particularly common and important when it comes to this feature.

This chapter discusses the following:

- Creating and Assigning Tasks 19
- Editing Tasks 36
- Moving Tasks 40
- Filtering Tasks 47

I Creating and Assigning Tasks

You can create tasks to help organize your workload. This includes the ability to set the priority level, dates, and estimated hours on tasks; associate tasks with projects; assign tasks to others or to yourself; and attach files to tasks.

Permission Required?


To create, edit, add comments to, or delete a task, you must have the following permission setting:

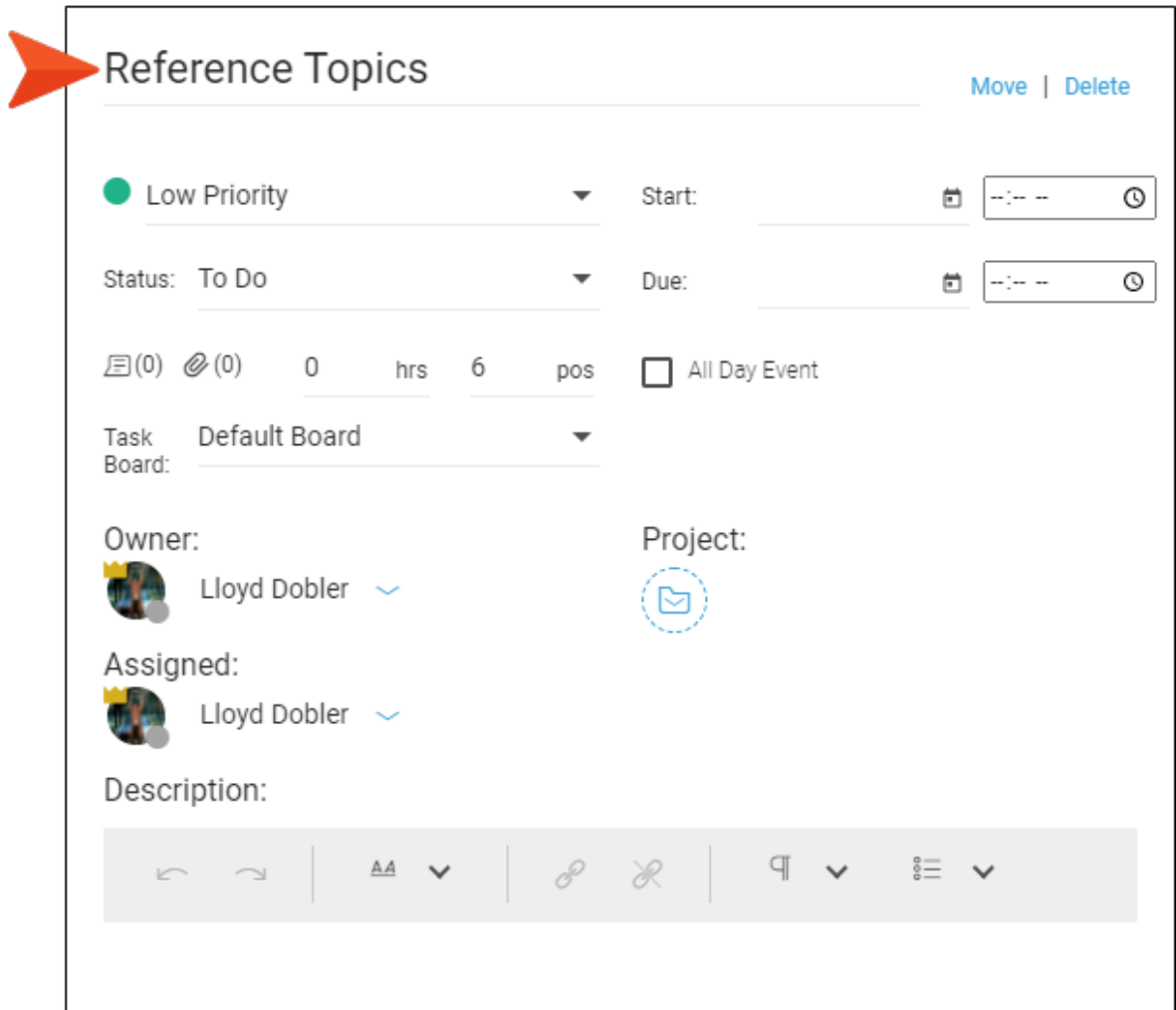


Without permission, you can only view tasks.

For more information about permissions, see the Help system.

How to Create a Task

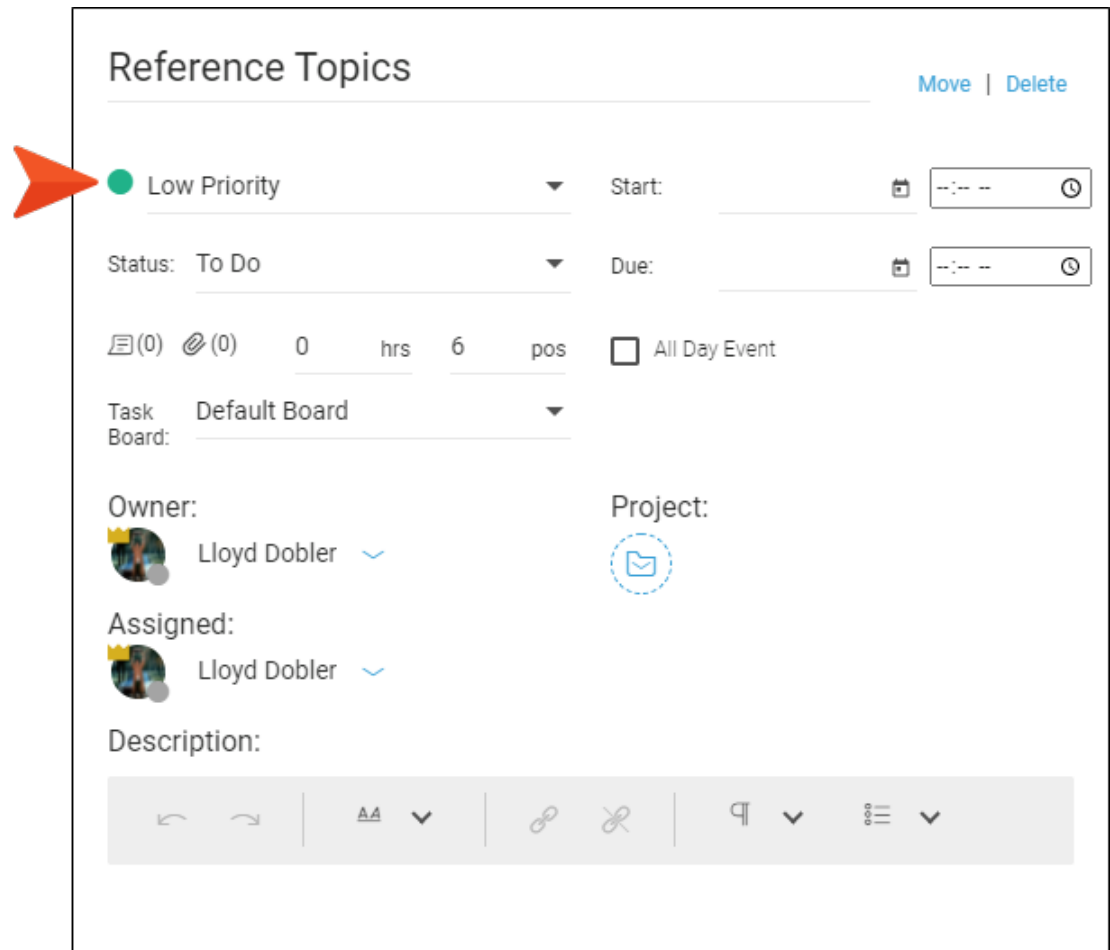
1. On the left side of the interface, click **Tasks**.
2. In the grid, select a task board. If no boards display, you might have to create a board and add tasks to it.
3. In the toolbar click .
4. At the top, on the **Details** tab, enter a title for the task.



The screenshot shows a task creation form titled "Reference Topics" with an orange arrow pointing to the title field. The form includes the following fields and options:

- Title:** Reference Topics (with "Move" and "Delete" links)
- Priority:** Low Priority (with a dropdown arrow)
- Status:** To Do (with a dropdown arrow)
- Start:** Calendar icon and date input field (format: --:-- --)
- Due:** Calendar icon and date input field (format: --:-- --)
- Duration:** 0 hrs 6 pos (with a dropdown arrow)
- Task Board:** Default Board (with a dropdown arrow)
- Owner:** Lloyd Dobler (with a dropdown arrow)
- Assigned:** Lloyd Dobler (with a dropdown arrow)
- Project:** (with a dashed circle icon)
- All Day Event:**
- Description:** (with a text area and a toolbar containing icons for undo, redo, font size, link, unlink, quote, and list)

5. (Optional) Complete any of the other fields in the dialog:
- **[Priority Level]** Click in this field and select a level—**Low Priority**, **Medium Priority**, or **High Priority**. Each priority level is indicated by a color, which is shown in the task card:
 - Low=Green
 - Medium=Yellow
 - High=Red



The screenshot shows a 'Reference Topics' dialog box with the following fields and options:

- Priority:** A dropdown menu currently set to 'Low Priority', indicated by a green circle. A red arrow points to this field.
- Status:** A dropdown menu currently set to 'To Do'.
- Start:** A date and time picker field.
- Due:** A date and time picker field.
- Duration:** A field showing '0 hrs 6 pos'.
- All Day Event:** A checkbox that is currently unchecked.
- Task Board:** A dropdown menu currently set to 'Default Board'.
- Owner:** A field showing 'Lloyd Dobler' with a dropdown arrow.
- Assigned:** A field showing 'Lloyd Dobler' with a dropdown arrow.
- Description:** A text area with a rich text editor toolbar below it.

The toolbar for the description field includes icons for undo, redo, bold, italic, link, unlink, list, and indent.

- **Status** You can select the milestone or location for the task. A new task is automatically placed in the To Do milestone.

The screenshot shows a task creation interface titled "Reference Topics". At the top right, there are "Move" and "Delete" links. The task is currently set to "Low Priority". The "Status" dropdown menu is open, with "To Do" selected and highlighted. Other status options include "In Progress", "Completed", "Backlog", and "Archive". An orange arrow points to the "To Do" option. The "Start" and "Due" fields are empty date pickers. There is an "All Day Event" checkbox which is unchecked. The "Project" field is empty with a project icon. The "Assigned" field shows "Lloyd Dobler" with a dropdown arrow. The "Description" field is empty with a rich text editor toolbar below it.

- [Estimated Hours] You can enter an estimated number of hours for the task.

Reference Topics

[Move](#) | [Delete](#)

● Low Priority ▼ Start: [calendar icon] [--:-- --] [clock icon]

Status: To Do ▼ Due: [calendar icon] [--:-- --] [clock icon]

[list icon] (0) [link icon] (0) **52 hrs** 6 pos All Day Event

Task Board: Default Board ▼

Owner: Lloyd Dobler ▼

Project:

Assigned: Lloyd Dobler ▼

Description:

[undo icon] [redo icon] | [font size icon] ▼ | [link icon] [unlink icon] | [text color icon] ▼ | [list icon] ▼

- **[Position]** You can choose the position of the task in the milestone (e.g., 1 is the top). By default, new tasks are placed at the bottom of the milestone unless you specify otherwise. For example, if the milestone currently has six existing tasks in it, the new task will have a position of 7.

Reference Topics

[Move](#) | [Delete](#)

● Low Priority ▼ Start: [calendar icon] [--- --] [clock icon]

Status: To Do ▼ Due: [calendar icon] [--- --] [clock icon]

[list icon] (0) [tag icon] (0) 52 hrs **7 pos** All Day Event

Task Board: Default Board ▼

Owner: Lloyd Dobler ▼

Project:

Assigned: Lloyd Dobler ▼

Description:

[undo icon] [redo icon] | **AA** ▼ | [link icon] [unlink icon] | [font size icon] ▼ | [list icon] ▼

- **Task Board** You can choose a different task board to hold the task.

The screenshot shows a task configuration interface titled "Reference Topics" with "Move" and "Delete" options. The task is set to "Low Priority" and "Status: To Do". It has a duration of "52 hrs 7 pos" and is not an "All Day Event". The "Task Board" is currently set to "Default Board", which is highlighted with a red box and an orange arrow. Other fields include "Owner: Lloyd Dobler" and "Assigned: Lloyd Dobler". A "Project" field is also present with a dashed blue circle icon. At the bottom, there is a description field with a rich text editor toolbar.

- **Start** You can select the date and time when the task should be started. This date is used when looking at the task in Calendar view.

Reference Topics Move | Delete

● Low Priority

Start: 9/11/2021 12:00 AM

Status: To Do Due: 2/28/2022 05:00 PM

(0) (0) 52 hrs 7 pos All Day Event

Task Board: Default Board

Owner: Lloyd Dobler

Project:

Assigned: Lloyd Dobler

Description:

- **Due** You can select the date and time when the task is due. This date is used when looking at the task in Calendar view. When a task is past the due date (and not yet completed), the text turns red.

The screenshot shows a task card titled "Reference Topics" with a "Move | Delete" link in the top right. The task is categorized as "Low Priority" (indicated by a green dot) and has a status of "To Do". The start date is 9/11/2021 at 12:00 AM. The due date is 2/28/2022 at 05:00 PM, which is highlighted with a red box and a red arrow pointing to it. The task is estimated to take 52 hours and 7 positions. It is assigned to "Lloyd Dobler" and is part of a project. The description field is empty and includes a rich text editor toolbar.

Reference Topics Move | Delete

Low Priority Start: 9/11/2021 12:00 AM

Status: To Do Due: 2/28/2022 05:00 PM

(0) (0) 52 hrs 7 pos All Day Event

Task Board: Default Board

Owner: Lloyd Dobler Project:

Assigned: Lloyd Dobler

Description:

- **All Day Event** Select this if you want the task to automatically select all of the time for each day in the date range, from 12:00 AM to 11:59 PM.

The screenshot shows a task configuration interface for 'Reference Topics'. At the top right, there are 'Move' and 'Delete' links. The task is set to 'Low Priority' with a start date of 9/11/2021 and a due date of 2/28/2022. The status is 'To Do'. The duration is 52 hours and 7 minutes. The 'All Day Event' checkbox is checked and highlighted with a red box. The task is assigned to 'Lloyd Dobler' on the 'Default Board'. The interface also shows a description field with a rich text editor toolbar.

Reference Topics Move Delete

Low Priority Start: 9/11/2021 12:00 AM

Status: To Do Due: 2/28/2022 11:59 PM

(0) (0) 52 hrs 7 All Day Event

Task Board: Default Board

Owner: Lloyd Dobler Project:

Assigned: Lloyd Dobler

Description:

- **Owner** You can click the down arrow to choose another user as the owner of the task. This field might be needed when editing the task later, for example, if the original owner of the task leaves the company and you need to assign it to someone else.

The screenshot displays a task configuration interface titled "Reference Topics". At the top right, there are "Move" and "Delete" links. The interface includes several fields and controls:

- Priority:** A green circle icon followed by "Low Priority" and a dropdown arrow.
- Start:** A date field showing "9/11/2021" with a calendar icon and a time field showing "12:00 AM".
- Status:** A dropdown menu showing "To Do".
- Due:** A date field showing "2/28/2022" with a calendar icon and a time field showing "11:59 PM".
- Task Board:** A dropdown menu showing "Default Board".
- Owner:** A field labeled "Owner:" with a user profile picture and the name "Lloyd Dobler" followed by a dropdown arrow. A red arrow points to this field.
- Assigned:** A field labeled "Assigned:" with a user profile picture and the name "Lloyd Dobler" followed by a dropdown arrow.
- Project:** A field labeled "Project:" with a blue dashed circle icon containing a document symbol.
- Description:** A text area with a toolbar containing icons for undo, redo, bold, italic, link, unlink, quote, and list.

Additional information visible includes "52 hrs 7 pos" and "All Day Event" (checked).

- **Assigned** You can click the down arrow to assign the task to a user. By default a new task is assigned to yourself.


Reference Topics Move | Delete


● Low Priority ▼ Start: 9/11/2021 📅 12:00 AM


Status: To Do ▼ Due: 2/28/2022 📅 11:59 PM

📅(0) 📎(0) 52 hrs 7 pos All Day Event

Task Board: Default Board ▼


Owner:  Lloyd Dobler ▼


Project: 

Assigned:  Jeff Lebowsky ▼

Description:

← → | AA ▼ | 🔗 ✂ | ¶ ▼ | ☰ ▼

 **NOTE** A task can be assigned to only one person.

- **Project** Click  if you want to select a project. This associates the project with that task, and anytime users open the task, they can click the project link to open it in the Projects page.


Reference Topics Move | Delete

● Low Priority ▼ Start: 9/11/2021 📅 12:00 AM

Status: To Do ▼ Due: 2/28/2022 📅 11:59 PM

(0) (0) 52 hrs 7 pos All Day Event

Task Board: Default Board ▼

Owner: Lloyd Dobler ▼ Project: 

Assigned: Jeff Lebowski ▼

Description:

↶ ↷ | AA ▼ | 🔗 ✂ | 🔍 ▼ | ☰ ▼

Reference Topics

[Move](#) | [Delete](#)

● Low Priority ▼

Start: 9/11/2021

📅 12:00 AM

Status: To Do ▼

Due: 2/28/2022

📅 11:59 PM

📄(0) 📎(0) 52 hrs 7 pos All Day Event

Task Board: Default Board ▼

Owner:



Lloyd Dobler ▼

Project:



M1

Module1 ▼

Assigned:

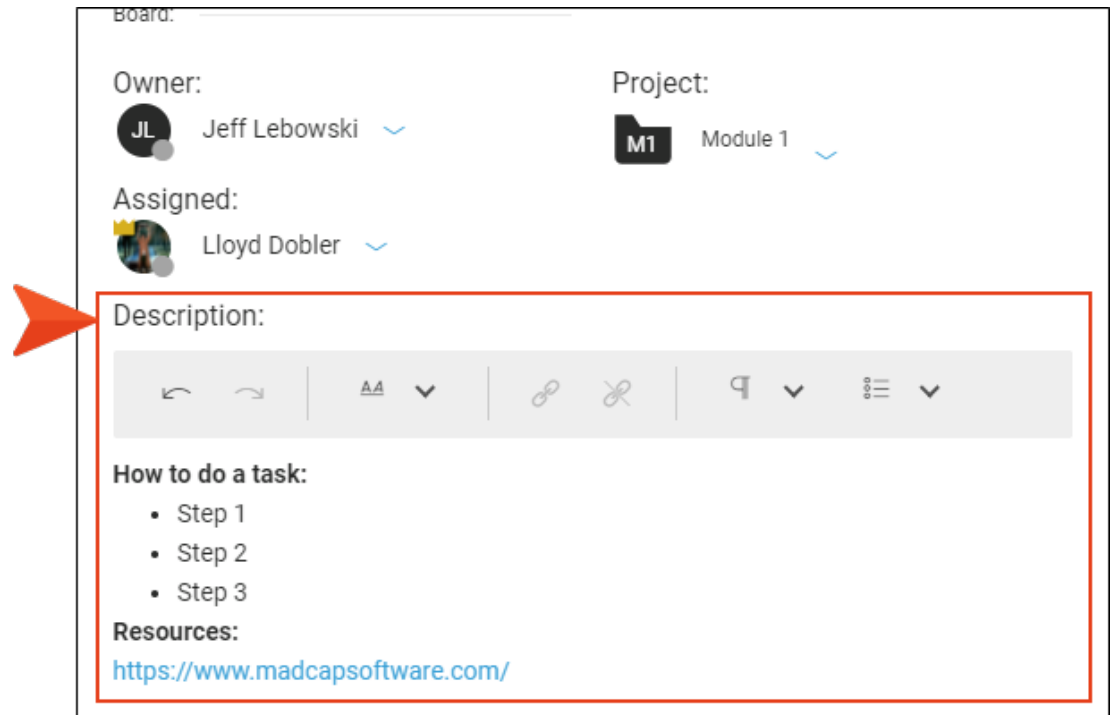


Jeff Lebowski ▼


Description:





- **Description** You can enter a description for the task. This field includes a rich text editor for editing and formatting your text in the task description. You can format text (e.g., bold, italics, underline), add headings, add bullet or ordered lists, increase or decrease indentation, or redo and undo actions. In addition, you can insert hyperlinks into the description. For example, these links can point to external websites, Google docs, or checklist URLs associated with your Flare Online license.




Board:

Owner:  Jeff Lebowski ▼

Project:  Module 1 ▼

Assigned:  Lloyd Dobler ▼

Description:



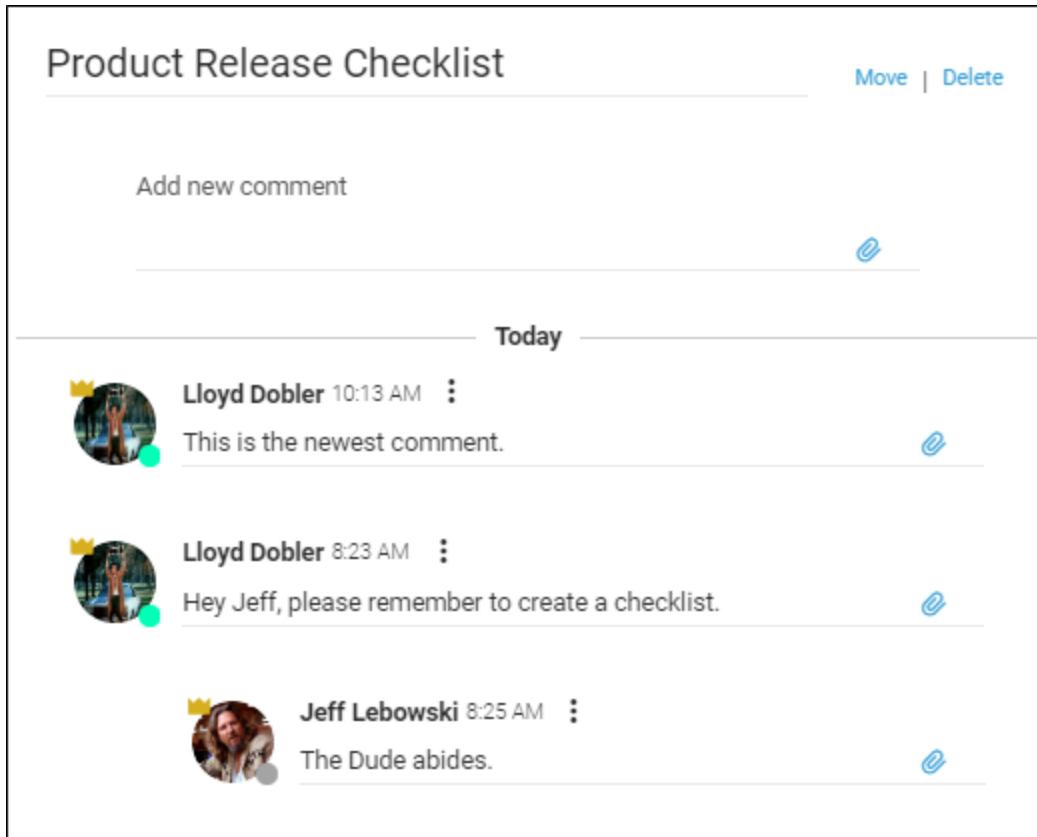
How to do a task:

- Step 1
- Step 2
- Step 3

Resources:

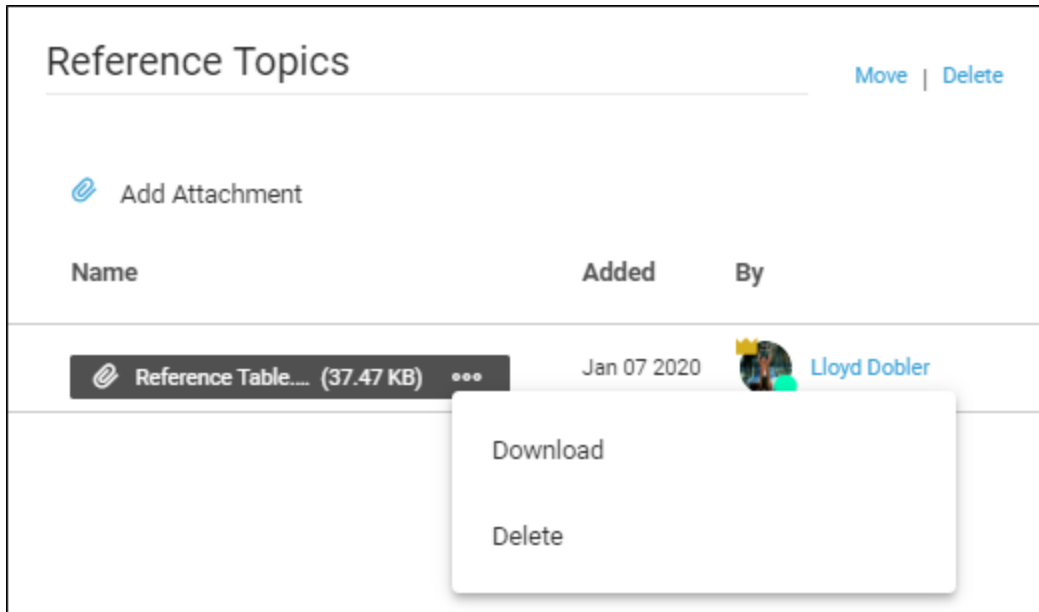
<https://www.madcapsoftware.com/>

6. (Optional) At the top of the dialog, select **Discussion**. You can use this area to add comments and maintain a conversation with others about the task.



 **NOTE** You can also use the paper clip button to add attachments to a comment.

- (Optional) At the top of the dialog, select **Attachments**. You can use this tab to associate one or more files with the task. Others can then click the ellipsis next to an attachment to download it.



- Click **Save**.

Editing Tasks

After creating a task, you can edit it to make changes or additions.

Permission Required?

To create, edit, add comments to, or delete a task, you must have the following permission setting:



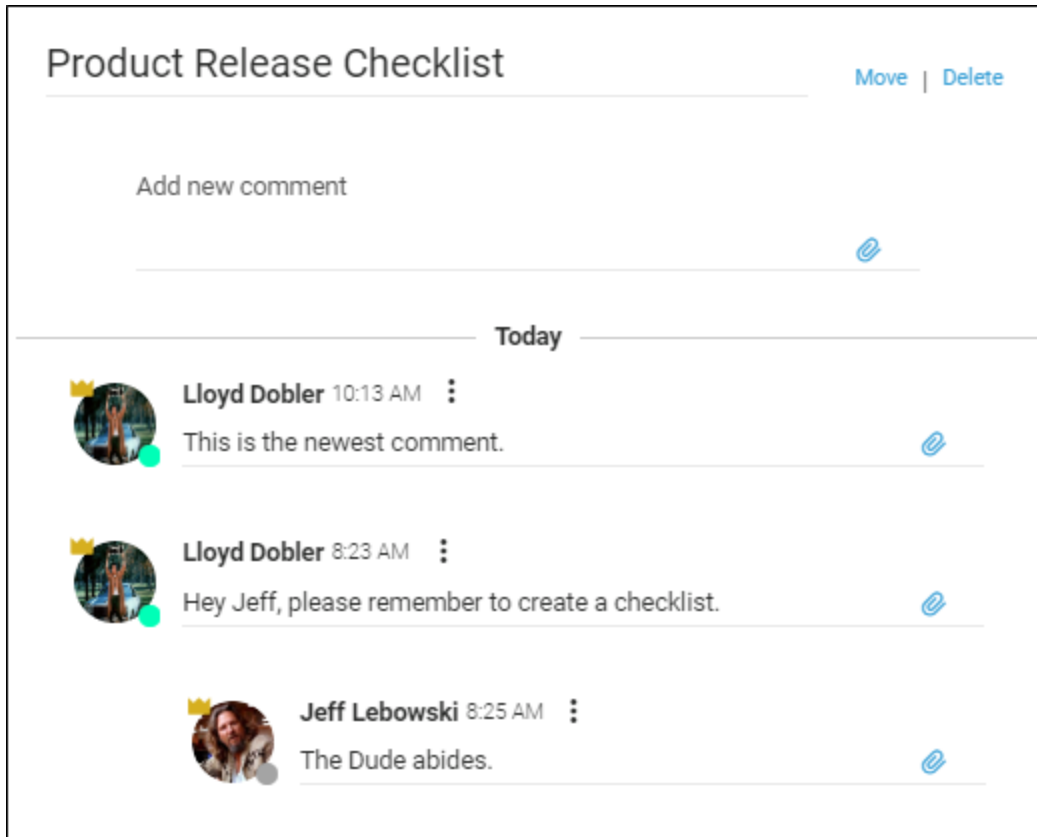
Without permission, you can only view tasks.


For more information about permissions, see the Help system.

How to Edit a Task

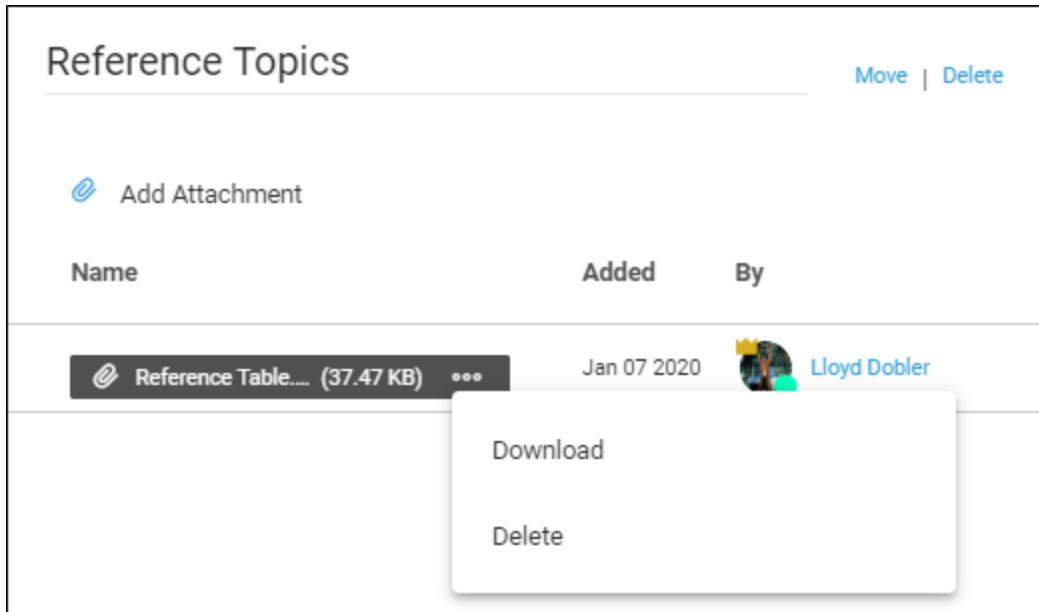
1. On the left side of the interface, click **Tasks**.
2. In the **Boards** grid, click the name of the task board holding the task. If no boards display, you might have to create a board and add tasks to it.
3. Locate the task card and click its name.
4. At the top of the dialog, on the **Details** tab, you can change the title of the task by clicking in the field and making the changes.
5. You can edit any of the other fields on that tab. For details, see "Creating and Assigning Tasks" on page 19.

6. (Optional) At the top of the dialog, select **Discussion**. You can use this area to add comments and maintain a conversation with others about the task. See "Adding Comments to Tasks" on page 55.




 **NOTE** You can also use the paper clip button to add attachments to a comment.

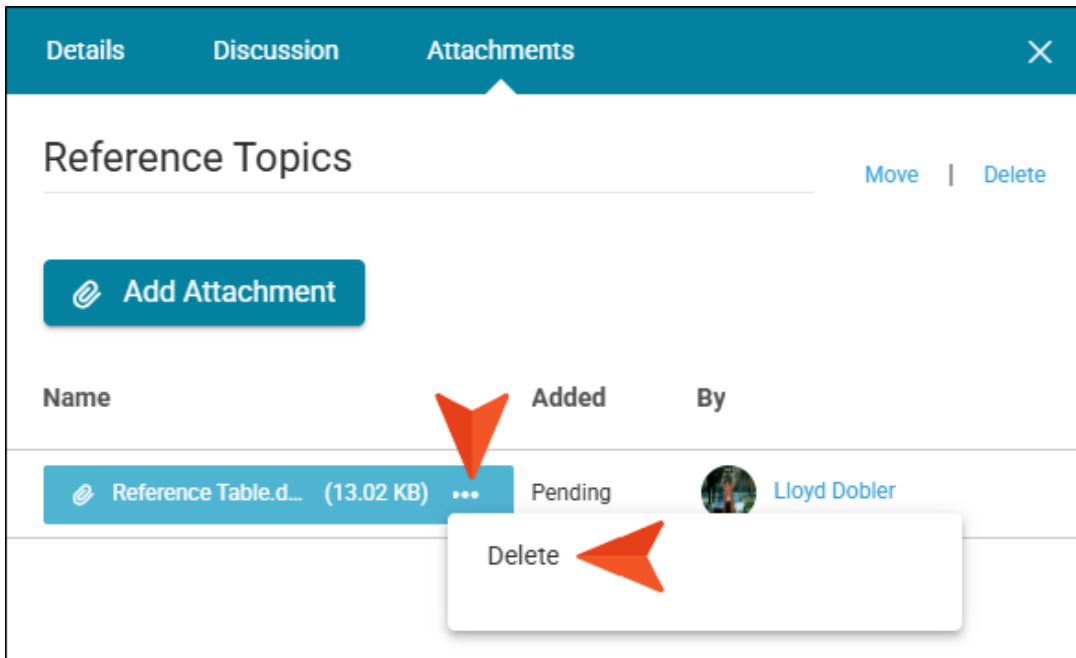
- (Optional) At the top of the dialog, select **Attachments**. You can use this tab to associate one or more files with the task. Others can then click the ellipsis next to an attachment to download it.



- Click **Save**.

 **NOTE** If you want to clean out files in order to save on storage space, you can delete files that are attached to individual tasks.

To do this, select the **Discussion** or **Attachments** tab, click the ellipsis at the end of the attachment, then select **Delete**.



I Moving Tasks

You can move tasks between milestones (To Do, In Progress, Completed), or up and down in a milestone to change the order. You can also move tasks to the Backlog and Archive areas. Tasks can be moved by dragging them, or by using menu options. If you want to move a task to a different task board, you can do that too.

Permission Required?

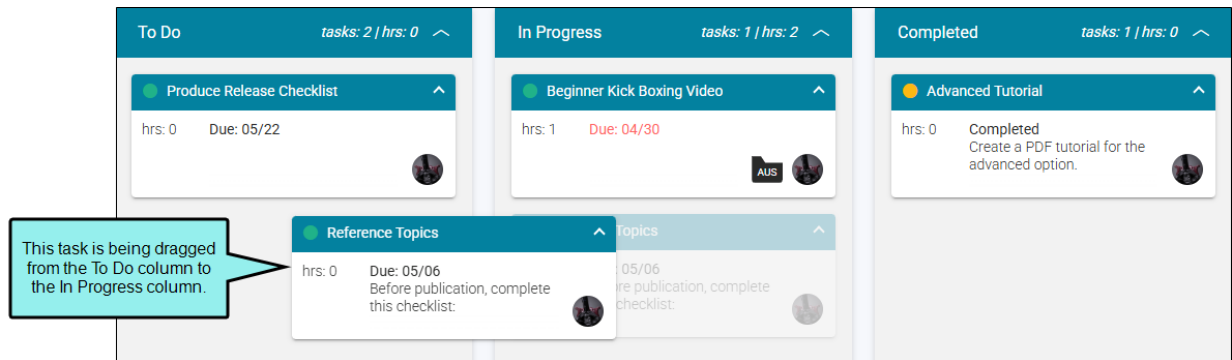
To move a task to a milestone, or to the Archive or Backlog, you must have the following permission setting:




For more information about permissions, see the Help system.

How to Move Tasks to Milestones by Dragging

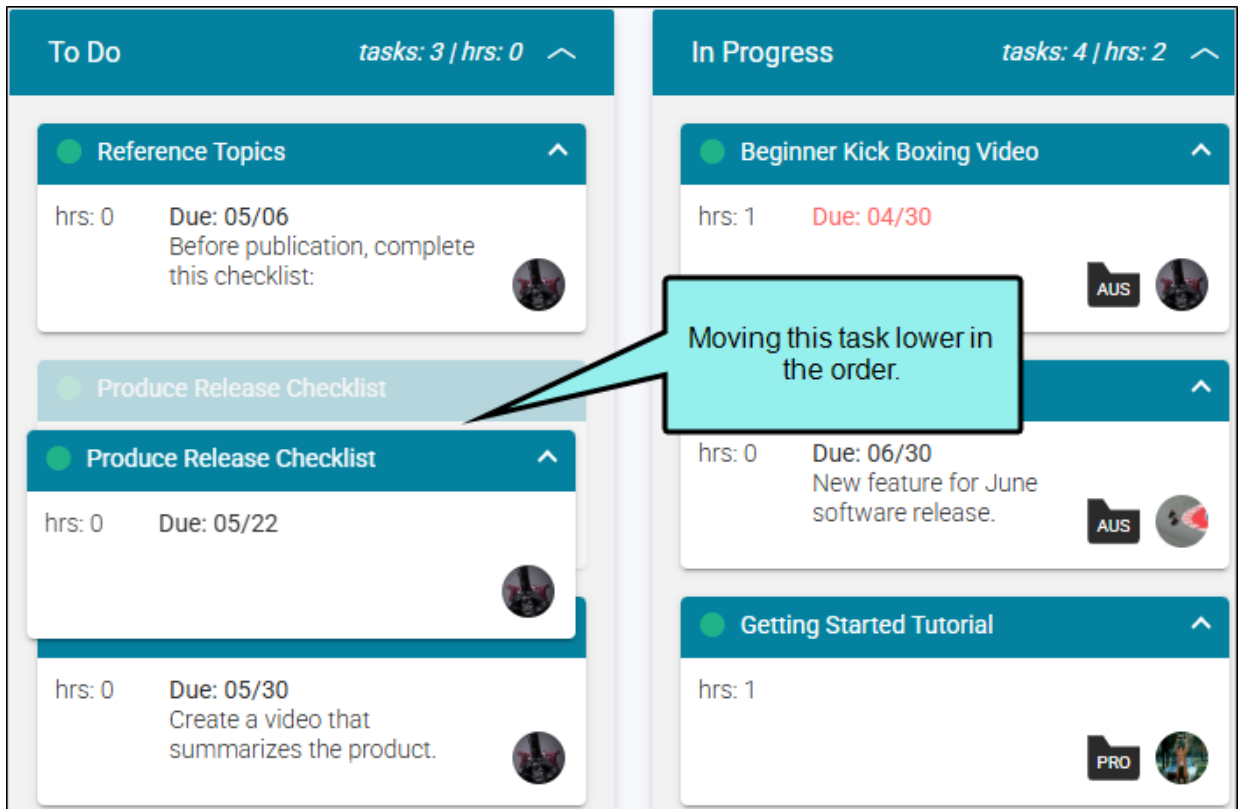
1. On the left side of the interface, click **Tasks**.
2. In the **Boards** grid, click the name of the task board holding the task.
3. Locate the task card, then click and drag it to one of the other milestone columns (To Do, In Progress, Completed).



 **NOTE** You cannot drag tasks to the Archive or Backlog area. You can only drag them to the milestone columns.


How to Move Tasks to Change the Order

1. On the left side of the interface, click **Tasks**.
2. In the **Boards** grid, click the name of the task board holding the task.
3. Locate the task card, then click and drag it up or down in its milestone column.



The image shows a task management board with two columns: 'To Do' and 'In Progress'. Each column has a header with task counts and a total hours estimate. The 'To Do' column contains three tasks, and the 'In Progress' column contains three tasks. A callout box points to the 'Produce Release Checklist' task in the 'To Do' column.

Column	Task Name	Hours	Due Date	Description	Assignee	Tag
To Do	Reference Topics	0	05/06	Before publication, complete this checklist.	[Avatar]	
To Do	Overview Video	0	05/30	Create a video that summarizes the product.	[Avatar]	
To Do	Produce Release Checklist	0	05/22		[Avatar]	
In Progress	Beginner Kick Boxing Video	1	04/30		[Avatar]	AUS
In Progress	New Documentation	0	06/30	New feature for June software release.	[Avatar]	AUS
In Progress	Produce Release Checklist	1			[Avatar]	PRO

 **NOTE** You can also open a task and change the position field (e.g., 1 is the top). For example, entering 7 in the **pos** field will position the task as the seventh from the top, if you have that many tasks in the milestone already)



Reference Topics Move | Delete


● Low Priority ▼ Start: 🕒

Status: To Do ▼ Due: 🕒

(0) (0) 52 hrs pos All Day Event

Task Board: Default Board ▼

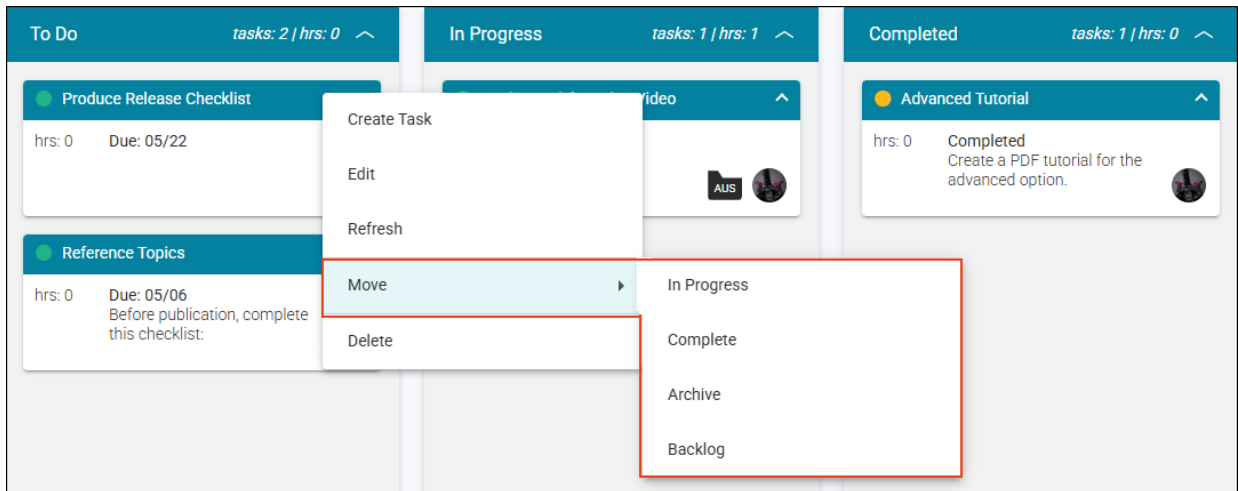
Owner:  Lloyd Dobler ▼ Project: 


Assigned:  Lloyd Dobler ▼

Description:

How to Move Tasks Using Menu Options

1. On the left side of the interface, click **Tasks**.
2. In the **Boards** grid, click the name of the task board holding the task.
3. Locate the task card and right-click it.
4. In the context menu, select **Move**. Then choose the location where you want to move the task.



 **NOTE** You also open a task, click **Move** in the upper-right corner, and use the context menu.

How to Move Tasks Out of Backlog or Archive

1. On the left side of the interface, click **Tasks**.
2. In the **Boards** grid, click the name of the task board holding the task.
3. At the top of the page, select **Backlog** or **Archive**.
4. In the grid, click the name of the task.
5. In the upper-right corner of the dialog, select **Move**.
6. In the context menu, select the location where you want to move the task.
7. Click **Save**.


I Filtering Tasks

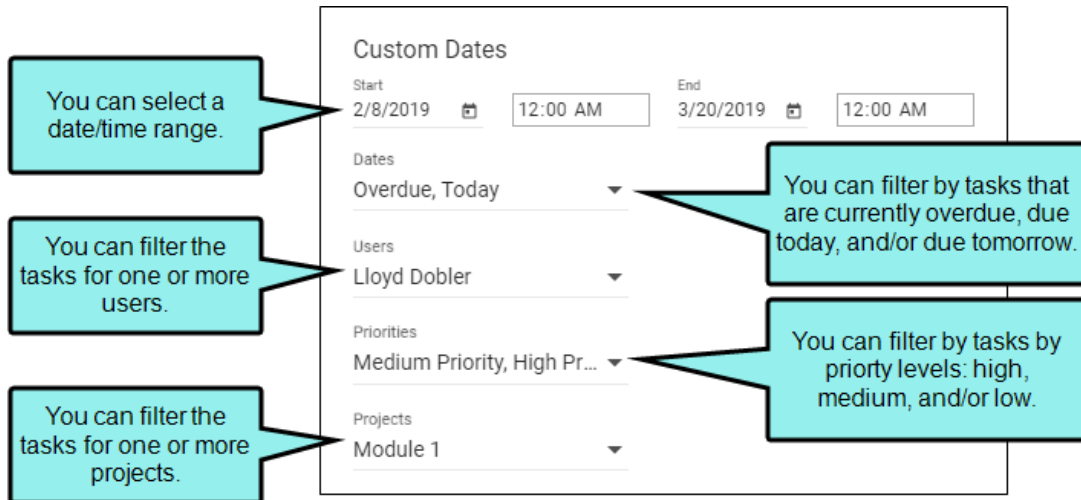
When viewing tasks, you can use several filter options to limit the tasks shown and make it easier to find what you're looking for.

Permission Required?


No special permission is required for this activity. All authors are allowed.

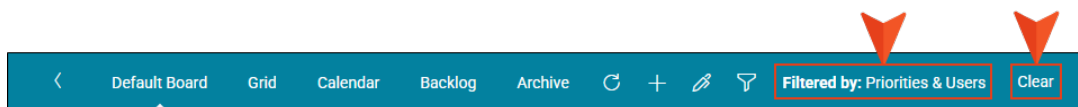
How to Filter Tasks

1. On the left side of the interface, click **Tasks**.
2. In the **Boards** grid, click the name of the task board holding the task.
3. In the toolbar, click .
4. Use the fields in the dialog to filter the tasks according to a date range, due dates, users, priority levels, and/or projects:



5. Click **Save**.

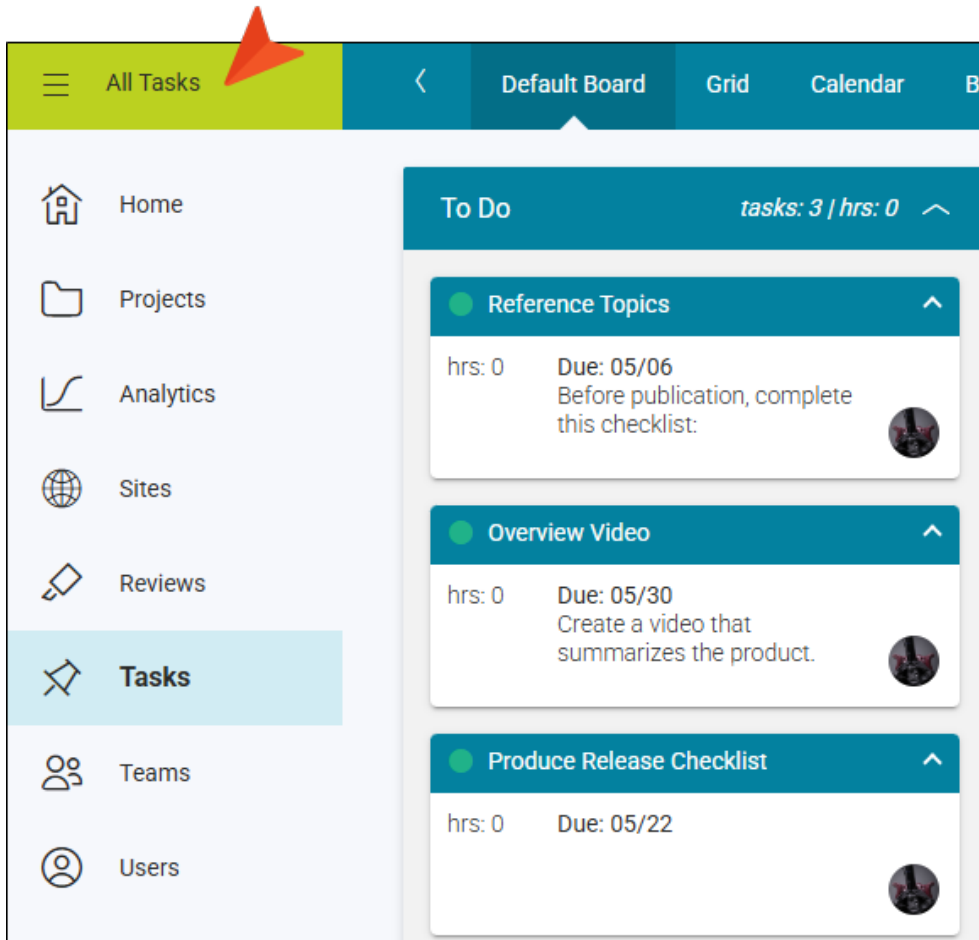
 **NOTE** When a filter is applied, the local toolbar changes slightly. A "filtered by" summary displays to quickly indicate the filter type, and a button to clear the filters. Select **Clear** to remove the filter(s).



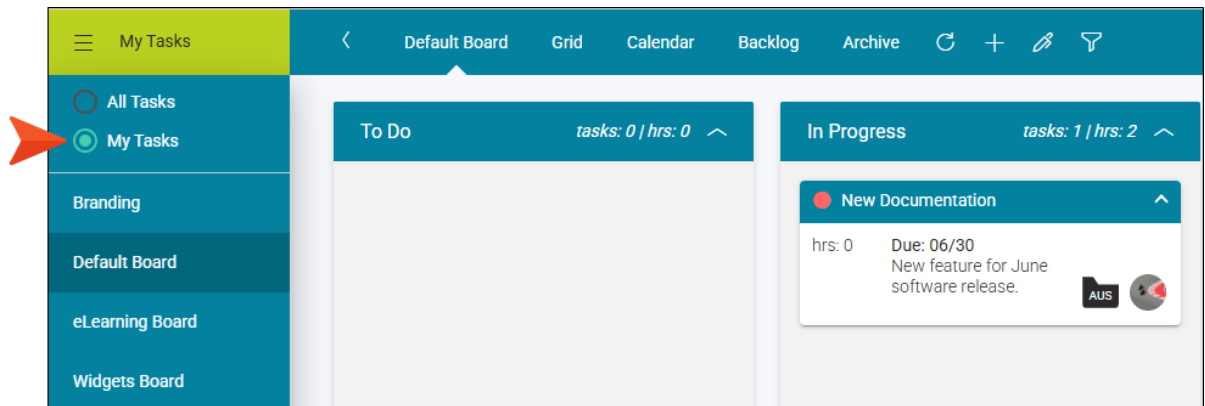
How to Switch Between All Tasks and My Tasks

In addition to the filter options described, you can also quickly filter between showing all tasks on the license and only tasks that are assigned to you.

1. On the left side of the interface, click **Tasks**.
2. In the **Boards** grid, click the name of the task board holding the task.
3. Click the upper-left corner of the interface, which by default, should initially say **All Tasks**.



4. In the flyout menu, you can select **My Tasks**.



And later you can select **All Tasks** again to see everything.

CHAPTER 4

Other Activities for Tasks

In addition to the main activities, there are some other tasks you might perform regarding this feature.

This chapter discusses the following:

- Viewing Task Details 52
- Adding Comments to Tasks 55
- Viewing Task Activity 60
- Setting Notifications for Tasks 62
- Deleting Tasks 63

I Viewing Task Details

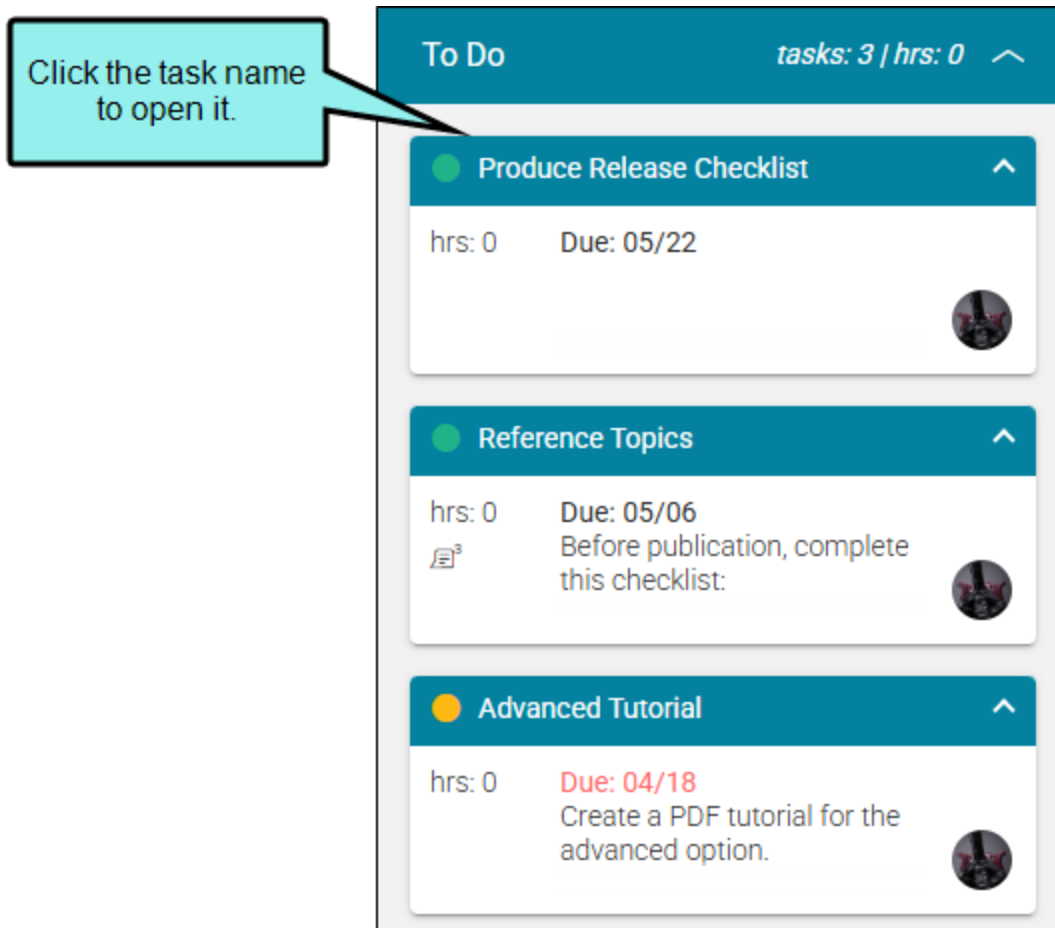
When working in any of the views on the Tasks page, anyone can click a task to view its details. From here, you can take various actions (e.g., move, edit, delete, add attachments, add comments) on the task, as long as you have the “Create/Edit Tasks” permission.

Permission Required?

No special permission is required for this activity. All authors are allowed.

How to View Task Details

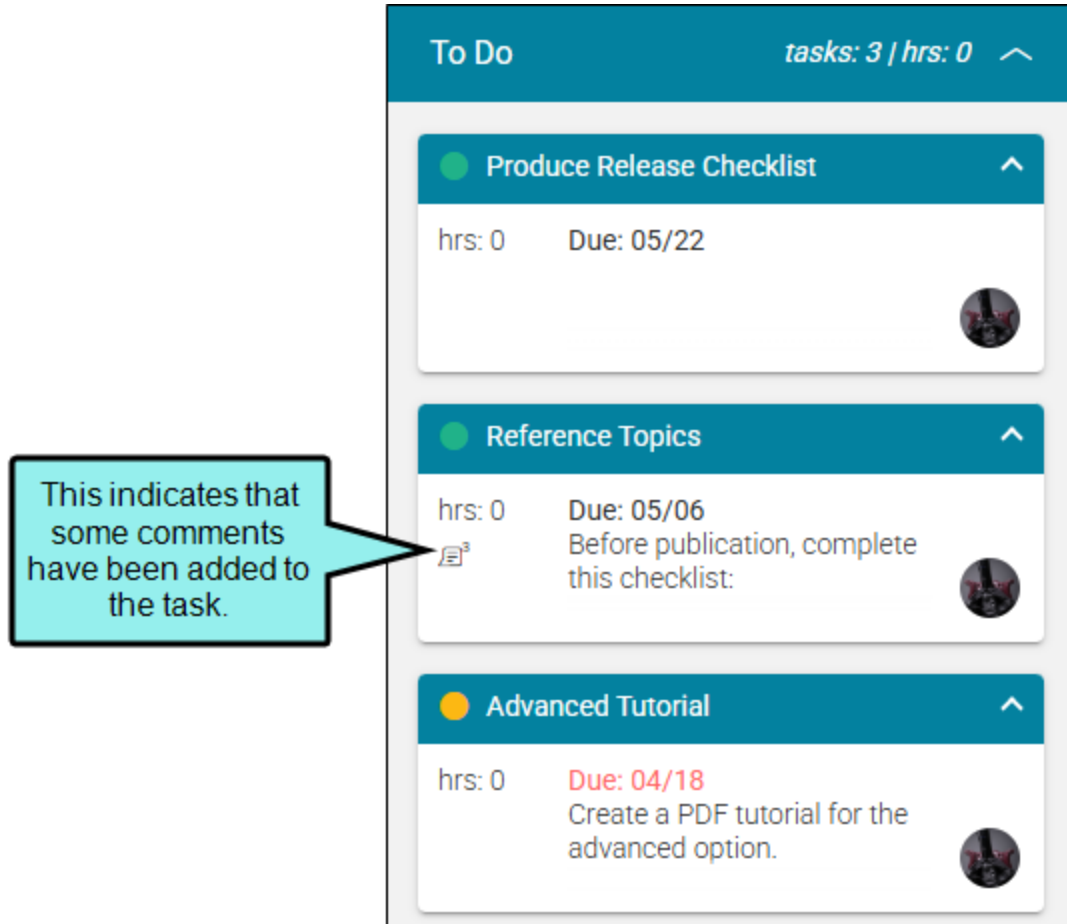
1. On the left side of the interface, click **Tasks**.
2. In the **Boards** grid, click the name of the task board holding the task.
3. Select any of the views at the top (the board, Grid, Calendar, Backlog, Archive).
4. Click the name of the task.



5. (Optional) From this dialog, you can select one of the tabs at the top: Details, Discussion, Attachments. You can then do the following, depending on your permission settings:
 - **Edit** On the **Details** tab, you can make various changes to the task after clicking in the different fields. See "Editing Tasks" on page 36.
 - **Move** At the top-right of the dialog, you can click **Move** in order to place the task in a different milestone (e.g., To Do, In Progress, Completed). See "Moving Tasks" on page 40.
 - **Delete** At the top-right of the dialog, you can click **Delete** in order to remove the task. See "Deleting Tasks" on page 63.
 - **Add Comments** On the **Discussion** tab, you can add comments related to the task. You can also click the paper clip icon to add attachments related to your comment. See "Adding Comments to Tasks" on the next page.
 - **Add Attachments** On the **Attachments** tab, you can choose one or more files to be associated with the task. Others can then download the attached files for more information about the task.
6. When finished, click **Save**.

Adding Comments to Tasks

You can add comments to task cards. This preserves any conversations between you and others about a specific task. An icon on the task card shows how many comments have been added to the task.



Permission Required?

To create, edit, add comments to, or delete a task, you must have the following permission setting:

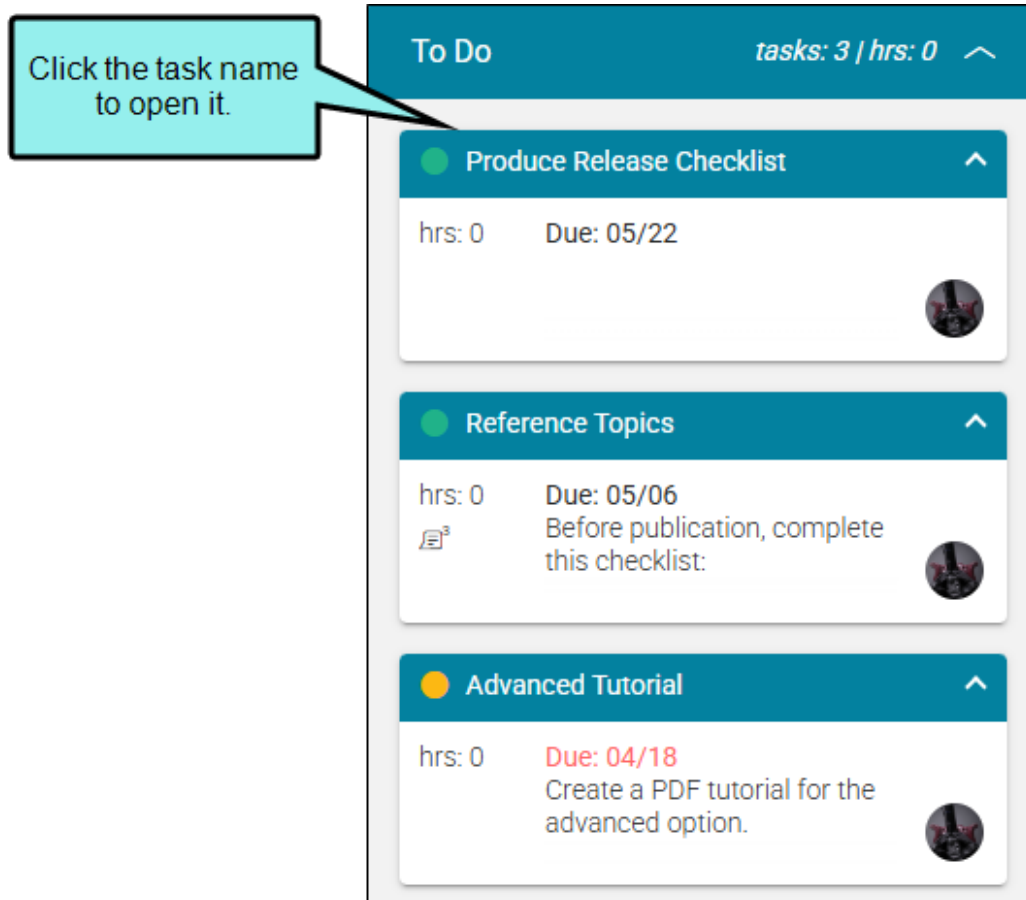
Create/Edit Tasks

Without permission, you can only view tasks.

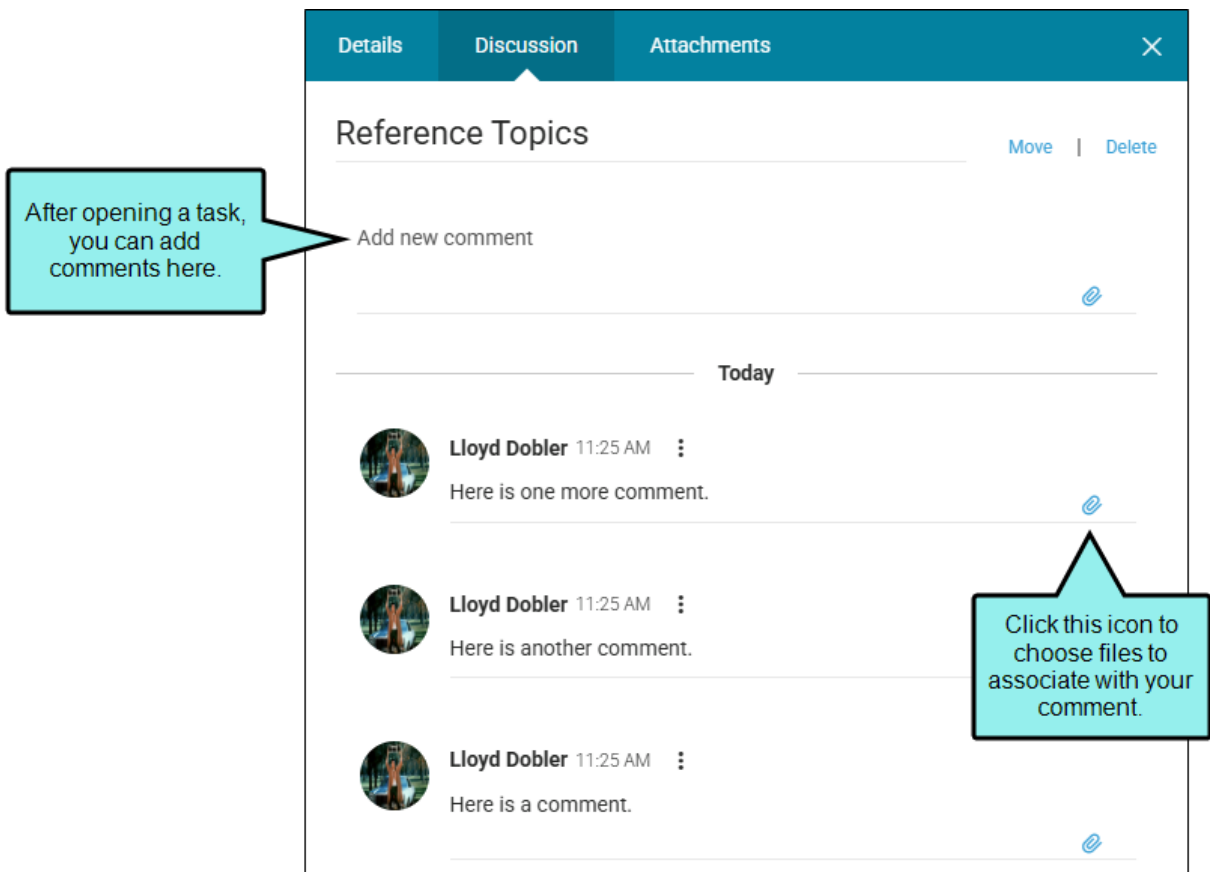
For more information about permissions, see the Help system.

How to Add a Comment to a Task

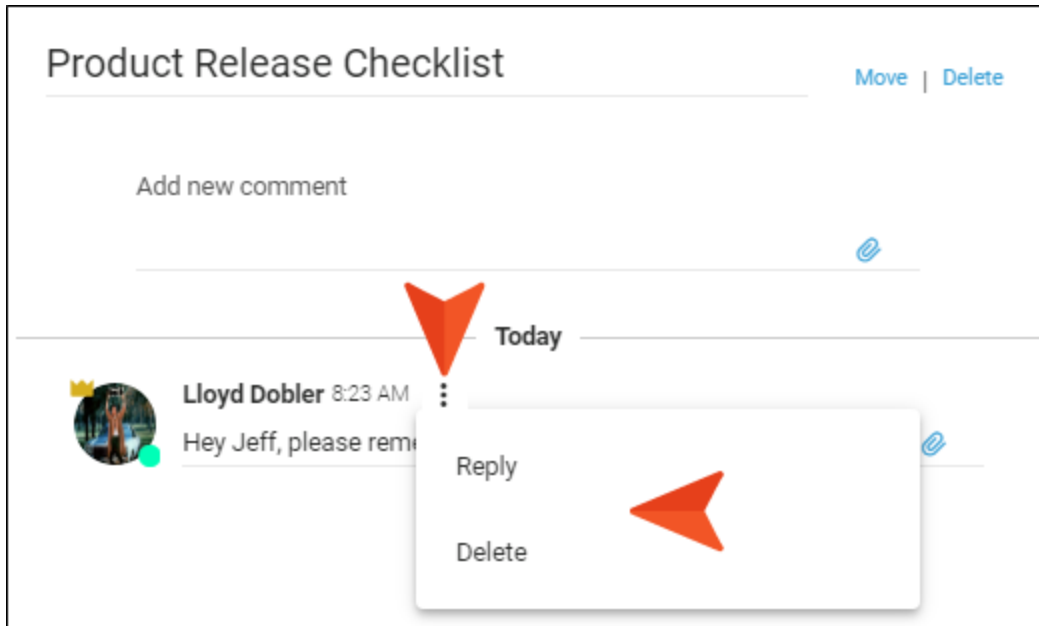
1. On the left side of the interface, click **Tasks**.
2. In the **Boards** grid, click the name of the task board holding the task.
3. Locate the task card and click its name.



4. At the top of the dialog, select **Discussion**.
5. Enter a comment. You can also click the paper clip icon to add attachments related to your comment.



If you want to reply to or delete a specific comment, click the ellipsis button next to it and make your selection.



6. Click **Save**.


As more comments are added, the newest ones are shown at the top.


Product Release Checklist


[Move](#) | [Delete](#)


Add new comment


Today




Lloyd Dobler 10:13 AM 


This is the newest comment. 







Lloyd Dobler 8:23 AM 


Hey Jeff, please remember to create a checklist.





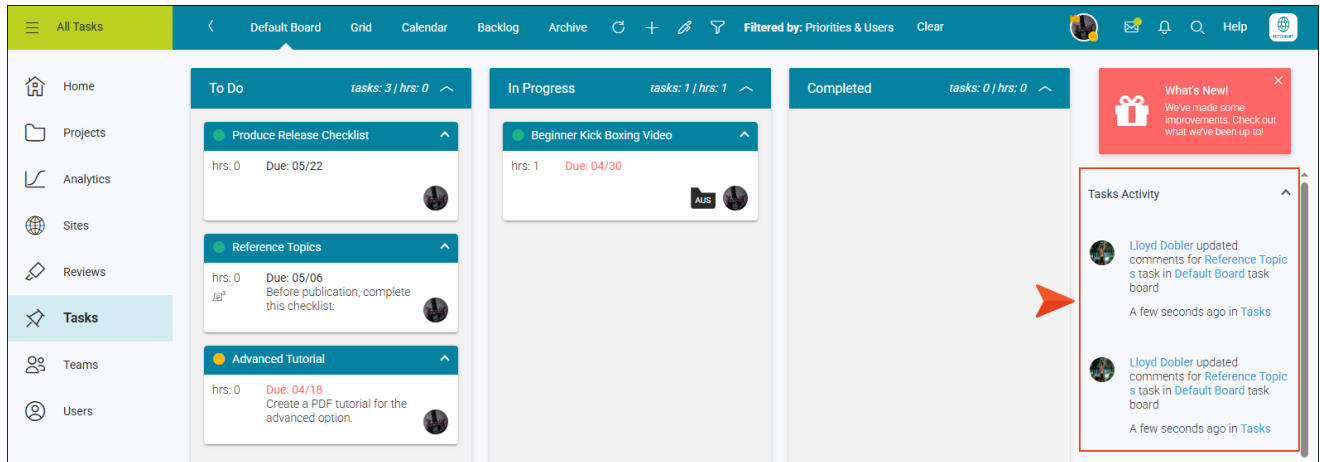
Jeff Lebowski 8:25 AM 

The Dude abides.

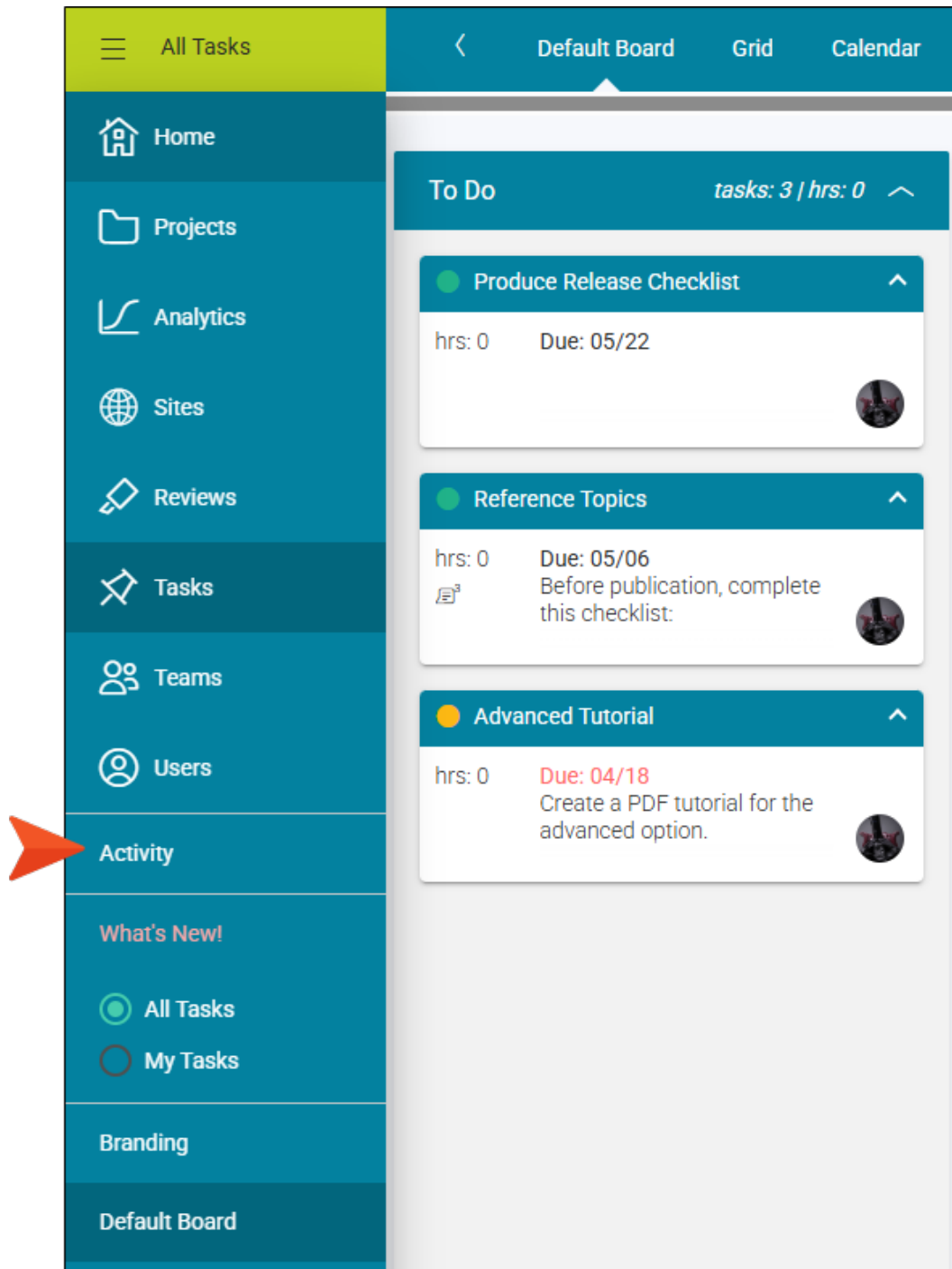


Viewing Task Activity

If you are viewing Flare Online on a larger screen or at a high resolution, there is a tracker on the right side of the Task Boards page showing the most recent task activities.



If you are viewing Flare Online on a smaller screen or at a low resolution, the task activity can be accessed from the flyout menu on the left.



Setting Notifications for Tasks

In your account settings, you can choose when to be notified for specific activities. The user who is notified depends on the activity. For more information, see the Help system.

The screenshot displays the 'Notifications' settings interface. On the left is a user profile for Lloyd Dobler, including his name, email (ldobler@ahem.madcapsoftware.com), and contact information. Below the profile is a sidebar menu with options like Settings, Password, Access, Assign New Task, Activity, Connectors, Permissions, Notifications (highlighted), Deactivate, and Delete. The main content area is titled 'Notifications' and contains the following settings:

- Send notifications by:** Notification Center, Email
- Send notifications when:**
 - Builds
 - Checklists
 - Licenses
 - Projects
 - Publications
 - Reports
 - Reviews
 - Sites
 - Tasks** (highlighted with a red box)
 - Comments or File Actions
 - Created Board
 - Deleted
 - Deleted Board
 - Edited
 - Edited Board
 - New/Assigned
 - Status Changed (Moved)
 - Teams
 - Translation

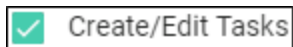
At the bottom right of the settings area are 'Cancel' and 'Save' buttons.

I Deleting Tasks

You can delete tasks one at a time from a task board, or you can delete multiple tasks at once from the Grid view.

Permission Required?

To create, edit, add comments to, or delete a task, you must have the following permission setting:




Without permission, you can only view tasks.

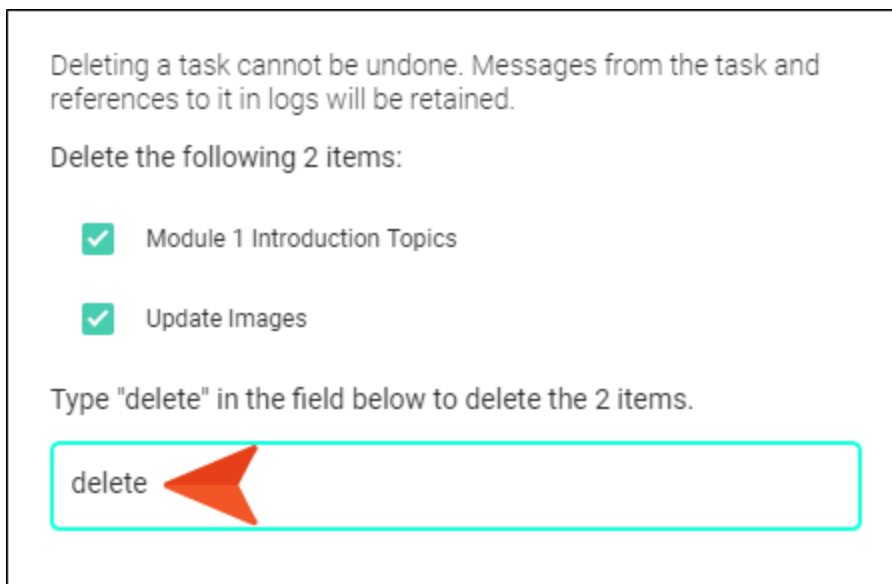
For more information about permissions, see the Help system.

How to Delete a Single Task From the Board View

1. On the left side of the interface, click **Tasks**.
2. In the **Boards** grid, click the name of the task board holding the task.
3. Locate the task card and click its name.
4. In the upper-right corner of the dialog, click **Delete**.


How to Delete Multiple Tasks From the Grid View


1. On the left side of the interface, click **Tasks**.
2. In the **Boards** grid, click the name of the task board holding the task.
3. At the top of the page, select **Grid**.
4. In the grid, click the check box to the left of each task you want to delete. Or click the top check box to select all tasks.
5. In the toolbar, click .
6. In the dialog, type `delete` in the field under the listed builds.



7. Click **Delete**.

What's Noteworthy?

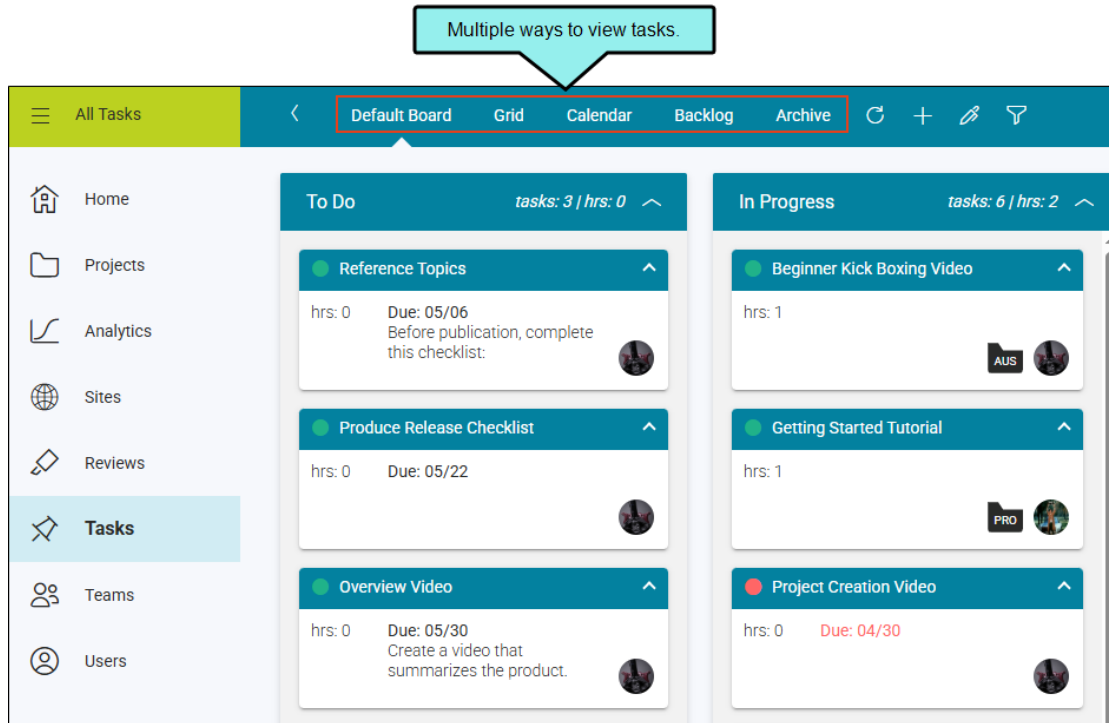
 **NOTE** Deleting a task also removes attachments associated with the task, thus freeing space on the license.

 **NOTE** If you want to remove a task from a task board, but plan to work on it sometime in the future, you probably want to move the task to the Backlog area instead of deleting it. See "Moving Tasks" on page 40.

CHAPTER 5

Page Views for Tasks

The Tasks page is a single framework with multiple views, which can be accessed at the top of the interface.

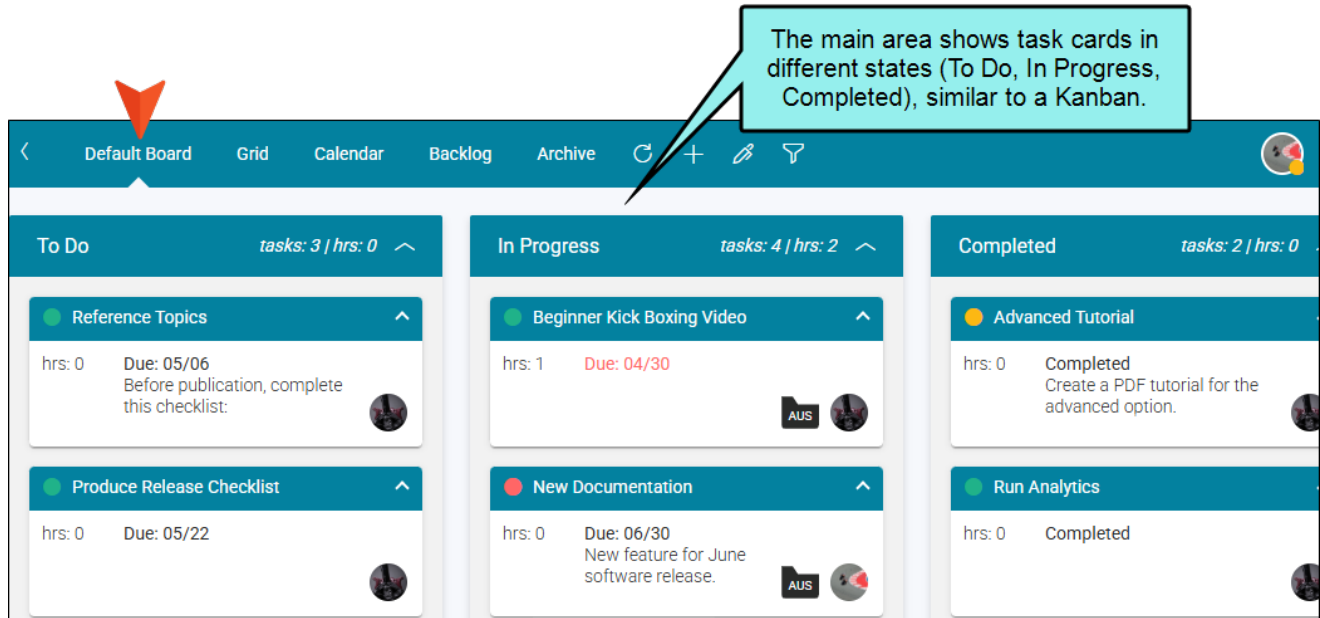


This chapter discusses the following:

Board View	68
Grid View	74
Calendar View	75
Backlog View	78
Archive View	79

Board View

The task board view is similar to a Kanban board. It consists of three preset milestones: To Do, In Progress, and Completed. You can move tasks from one milestone to another as work progresses. Anyone can open a task and add a comment to it. This lets you maintain conversations with others related to a specific task.



You can collapse and expand any or all cards. This lets you view more task cards on the screen.

You can click the arrow at the top to collapse or expand all tasks in a milestone.

The screenshot shows a task management interface with two columns: 'To Do' and 'In Progress'. Each column has a header with a title, task count, and hours, and a collapse/expand arrow. Below the headers are task cards, each with a title, status, due date, description, and a user profile picture.

Column	Header Title	Header Tasks	Header Hrs	Header Arrow
To Do	To Do	tasks: 3	hrs: 0	^
To Do	Reference Topics	hrs: 0	Due: 05/06	^
To Do	Produce Release Checklist	hrs: 0	Due: 05/22	^
To Do	Overview Video	hrs: 0	Due: 05/30	^
In Progress	In Progress	tasks: 4	hrs: 2	^
In Progress	Beginner Kick Boxing Video	hrs: 1	Due: 04/30	^
In Progress	New Documentation	hrs: 0	Due: 06/30	^
In Progress	Getting Started Tutorial	hrs: 1		^

To Do *tasks: 3 | hrs: 0* ▾

- Reference Topics ▾
- Produce Release Checklist ▾
- Overview Video ▾

All tasks in To Do are collapsed.

In Progress *tasks: 4 | hrs: 2* ⤴

- Beginner Kick Boxing Video ⤴
hrs: 1 Due: 04/30
AUS
- New Documentation ⤴
hrs: 0 Due: 06/30
New feature for June software release.
AUS

To Do *tasks: 3 | hrs: 0* ⤴

- Reference Topics ⤴
hrs: 0 Due: 05/06
Before publication, complete this checklist.
- Produce Release Checklist ⤴
hrs: 0 Due: 05/22
- Overview Video ⤴
hrs: 0 Due: 05/30
Create a video that summarizes the product.

You can also click the arrow on individual task cards to collapse or expand just those cards.

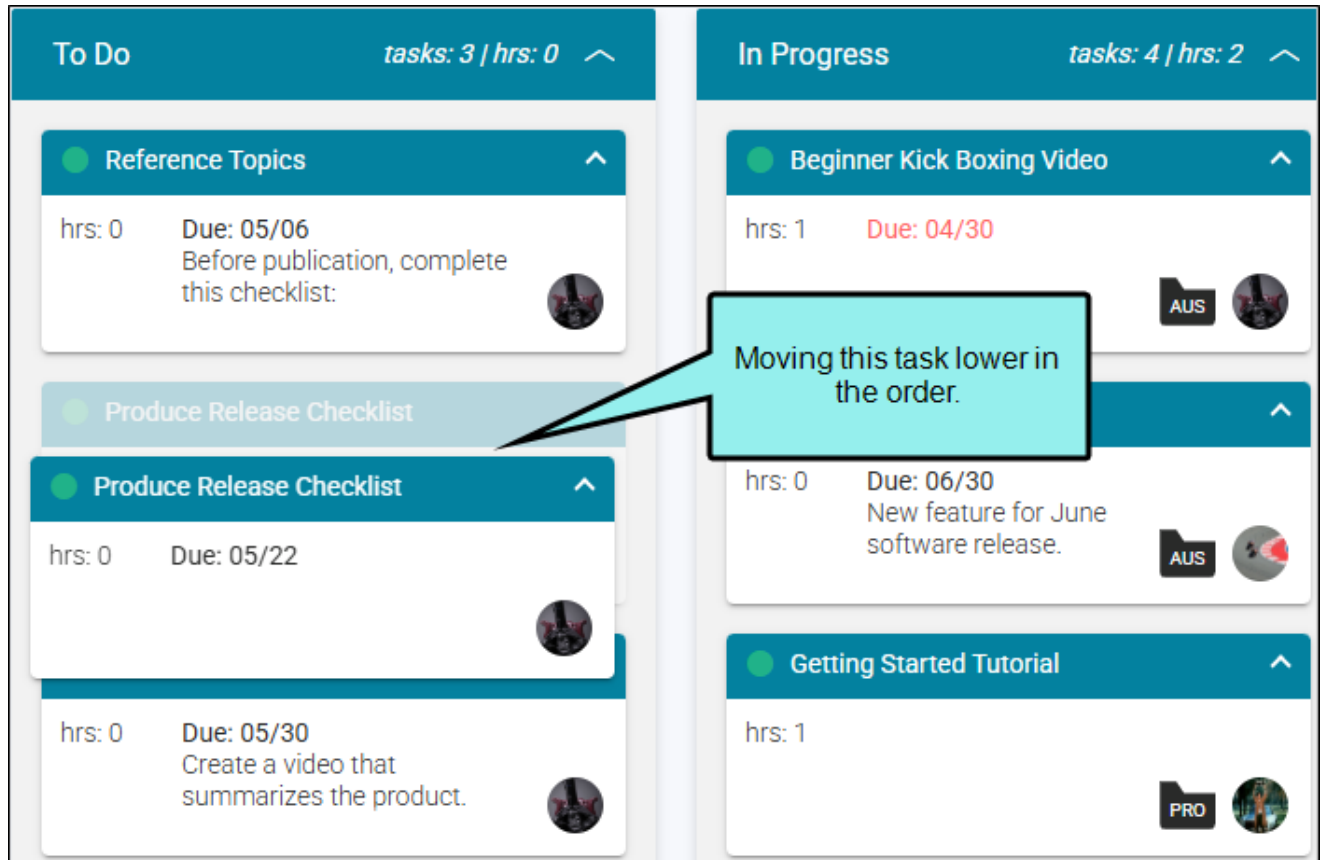
In Progress *tasks: 4 | hrs: 2* ⤴

- Beginner Kick Boxing Video ⤴
hrs: 1 Due: 04/30
AUS
- New Documentation ⤴
hrs: 0 Due: 06/30
New feature for June software release.
AUS
- Getting Started Tutorial ⤴
hrs: 1
PRO

The image shows a task management interface with two columns: 'To Do' and 'In Progress'. The 'To Do' column has a header 'tasks: 3 | hrs: 0' and contains three task cards: 'Reference Topics' (expanded), 'Produce Release Checklist' (collapsed), and 'Overview Video' (collapsed). The 'In Progress' column has a header 'tasks: 4 | hrs: 2' and contains two task cards: 'Beginner Kick Boxing Video' (expanded) and another card (partially visible, collapsed). A callout box points to the collapsed cards with the text: 'Just these two task cards are collapsed.'

Column	Header	Task Card	Status	Hours	Due Date	Notes
To Do	tasks: 3 hrs: 0	Reference Topics	Expanded	0	05/06	Before publication, complete this checklist:
		Produce Release Checklist	Collapsed			
		Overview Video	Collapsed			
In Progress	tasks: 4 hrs: 2	Beginner Kick Boxing Video	Expanded	1	04/30	
		...	Collapsed			software release.

Also, you can customize the order of the tasks within a milestone column by dragging and dropping the cards.



The image shows a task management interface with two columns: 'To Do' and 'In Progress'. Each column has a header with task counts and a list of tasks below. A callout box points to the 'Produce Release Checklist' task in the 'To Do' column.

Column	Task Name	Hours	Due Date	Description	Tags
To Do	Reference Topics	hrs: 0	Due: 05/06	Before publication, complete this checklist:	
	Overview Video	hrs: 0	Due: 05/30	Create a video that summarizes the product.	
	Produce Release Checklist	hrs: 0	Due: 05/22		
In Progress	Beginner Kick Boxing Video	hrs: 1	Due: 04/30		AUS
	New Documentation	hrs: 0	Due: 06/30	New feature for June software release.	AUS
	Produce Release Checklist	hrs: 1			PRO

Grid View

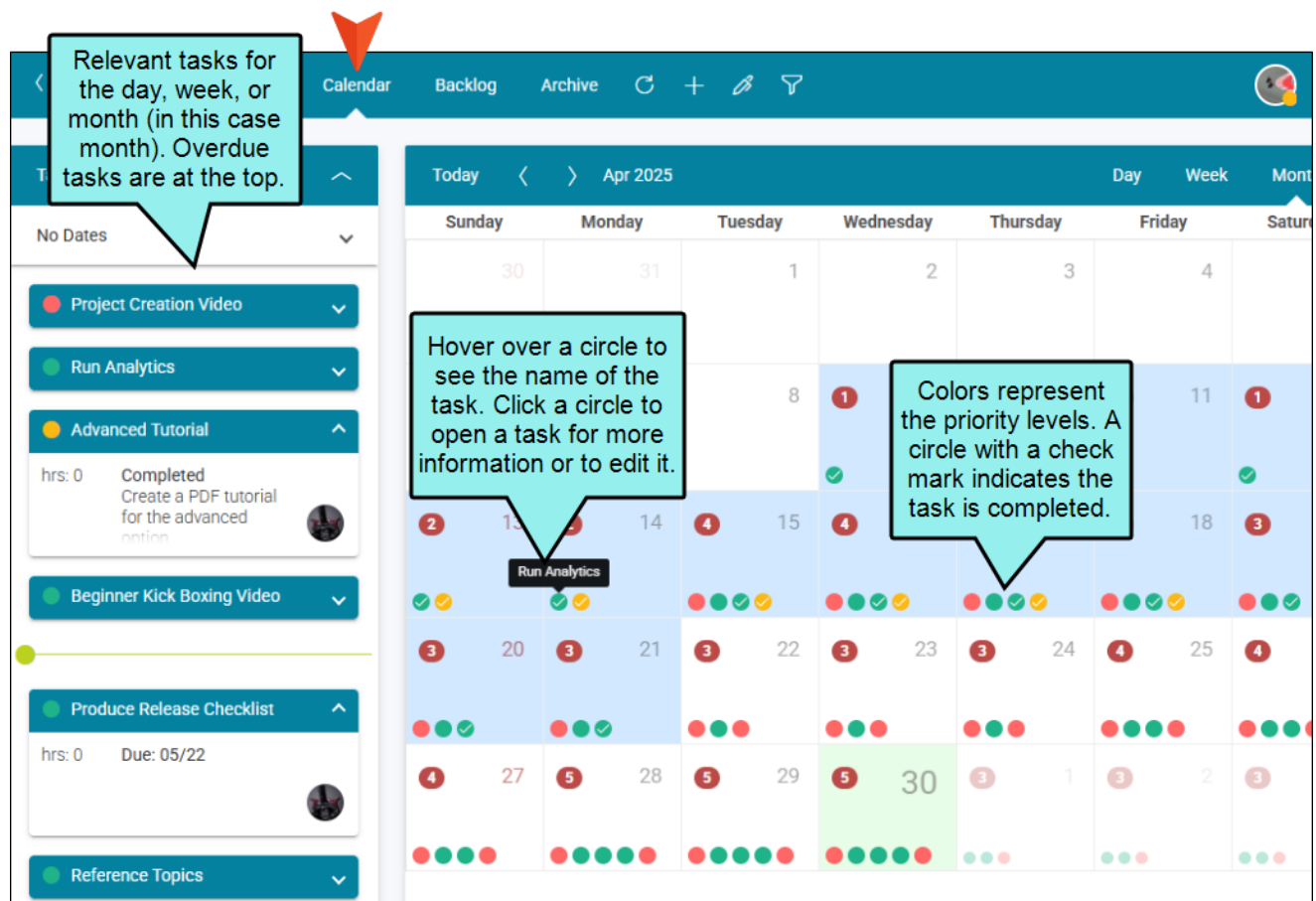
The Grid view displays tasks in a row format. You can click a task name to edit it. Also, you can use the check boxes to select one or more rows in order to take an action on all those tasks at once, such as moving them to another milestone or deleting them.

The screenshot shows the 'Grid' view of a task management application. The top navigation bar includes 'Default Board', 'Grid', 'Calendar', 'Backlog', and 'Archive'. Below the navigation bar, there are icons for trash, edit, checkmark, and settings, along with the text '2 tasks selected' and a 'Cancel' button. The main area displays a list of tasks with columns for Name, Project, Assigned To, Priority, and Start Date. Callouts provide instructions: 'Click a task name to edit it.' points to the 'Getting Started Tutorial' task name; 'Notice the check boxes. You can multi-select tasks and take action on them (e.g., delete).' points to the check boxes for 'Overview Video' and 'Advanced Tutorial'; and 'Click the three-dot menu to take action on a specific task.' points to the three-dot menu for 'Run Analytics'.

	Name	Project	Assigned To	Priority	Start Date
<input type="checkbox"/>	New Documentation	AUS	Eddie Vanetti	High	Apr 22, 2025 12:00 AM
<input type="checkbox"/>	Getting Started Tutorial	PRO	Lloyd Dobler	Low	
<input type="checkbox"/>	Beginner Kick Boxing Vi...		Stoecklein	Low	Apr 28, 2025 12:00 AM
<input type="checkbox"/>	Finish Index		Lloyd Dobler	Low	
<input checked="" type="checkbox"/>	Overview Video		Stoecklein	Low	May 07, 2025 12:00 AM
<input checked="" type="checkbox"/>	Advanced Tutorial		Stoecklein	Medium	Apr 13, 2025 12:00 AM
<input type="checkbox"/>	Reference To		Paul Stoecklein	Low	Apr 25, 2025 12:00 AM
<input type="checkbox"/>	Run Analytics		Paul Stoecklein	Low	Apr 09, 2025 12:00 AM

Calendar View

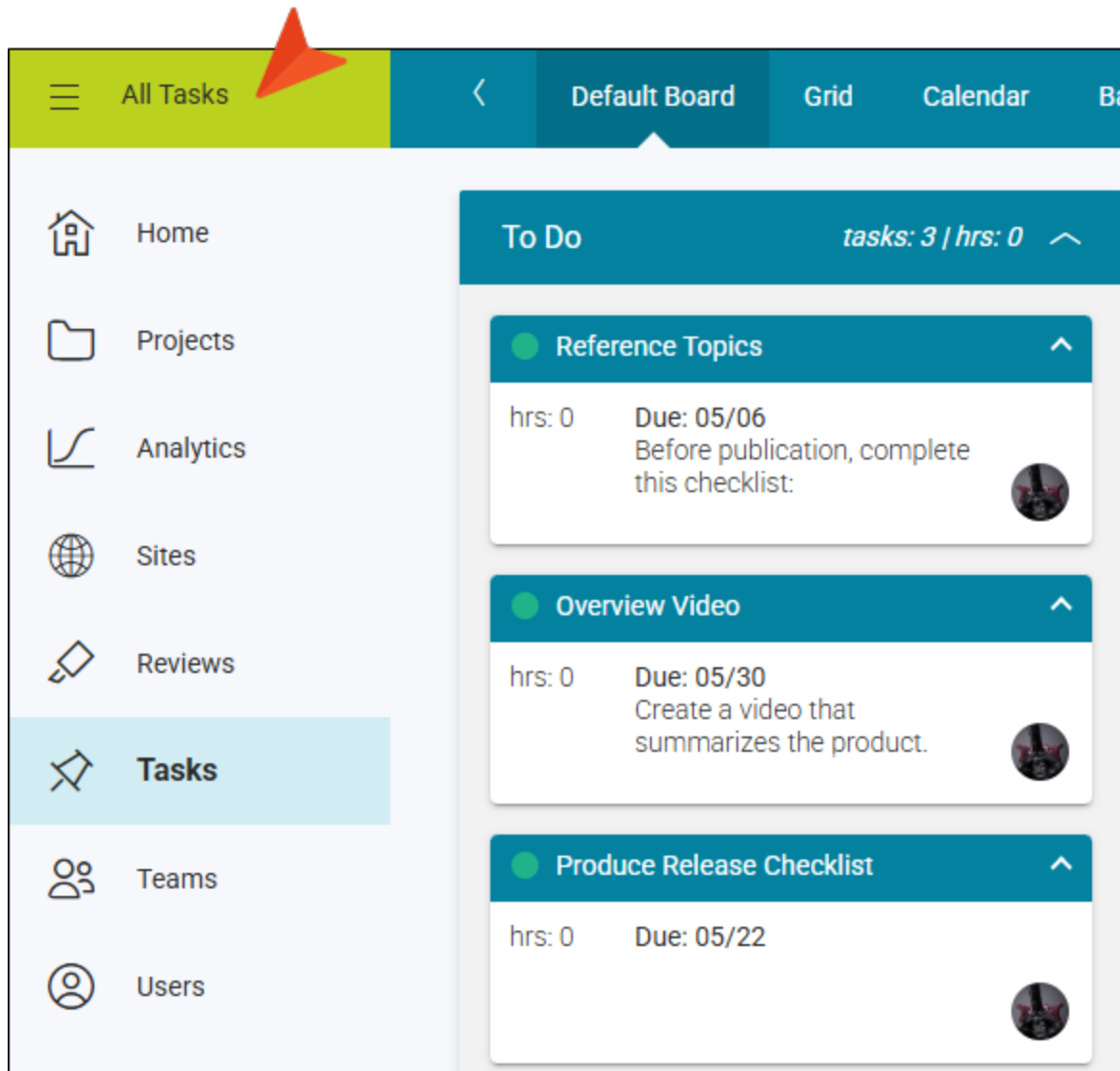
The Calendar view displays tasks in a calendar format for the day, week, and month, with task cards listed to the left. Tasks in all milestones—including the Backlog and Archive—are included. However, only tasks that contain dates are displayed in the Calendar view. Small, color-coded circles represent tasks and their priority levels. Hovering over a circle lets you see the name of a task, and clicking the circle opens the task so you can edit it.



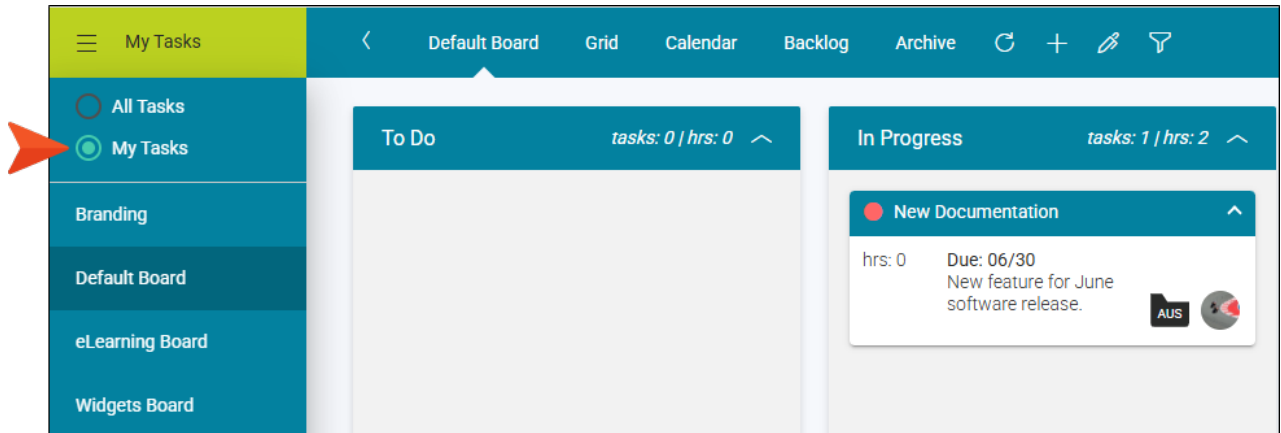
Since the Calendar view can get cluttered if you have a lot of users and many colored circles representing tasks for all them, this is a good place to use a filter. For example, you can switch between All Tasks (showing tasks for all users) and My Tasks (showing only tasks assigned to you). This and other filters work in any of the Task page views, but can be especially useful in the

Calendar view. See "Filtering Tasks" on page 47.

To use the "All Tasks/My Tasks" filter, click the upper-left corner of the interface, which by default, should initially say **All Tasks**.



Then, in the flyout menu, you can select **My Tasks**.



I Backlog View

The Backlog view displays tasks that are not yet complete and need to be removed from the work flow. The idea is that backlogged tasks will be revisited in the future so that they can be completed.

How to Move a Task to Backlog

1. On the left side of Flare Online, select **Tasks**.
2. Right-click a task card.
3. Select **Move > Backlog**.

I Archive View

The Archive view displays tasks that have been finished and moved out of the current workflow. It is sort of like putting boxes of old documents into the attic; you want them out of the way but can retrieve them later if necessary.

How to Move a Task to Archive

1. On the left side of Flare Online, select **Tasks**.
2. Right-click a task card.
3. Select **Move > Archive**.

APPENDIX

PDFs

The following PDFs are available for download from the Help system.

AI Assist Guide

Analytics Guide

Authoring Guide

Branding Guide

Building Output Guide

Checklists Guide

Conditions Guide

Getting Started Guide

*Images and Multimedia
Guide*

*License Management and
Purchasing Guide*

Links Guide

Projects Guide

Reports Guide

Reviews Guide

Security Whitepaper

Sites Guide

Snippets Guide

Source Control Guide

Targets Guide

Tasks Guide

TOC Guide

Topics Guide

Translation Guide

Users and Teams Guide

Variables Guide

What's New Guide

Widgets Guide