madcap software

USER GUIDE

MADCAP FLARE ONLINE

Tasks Guide

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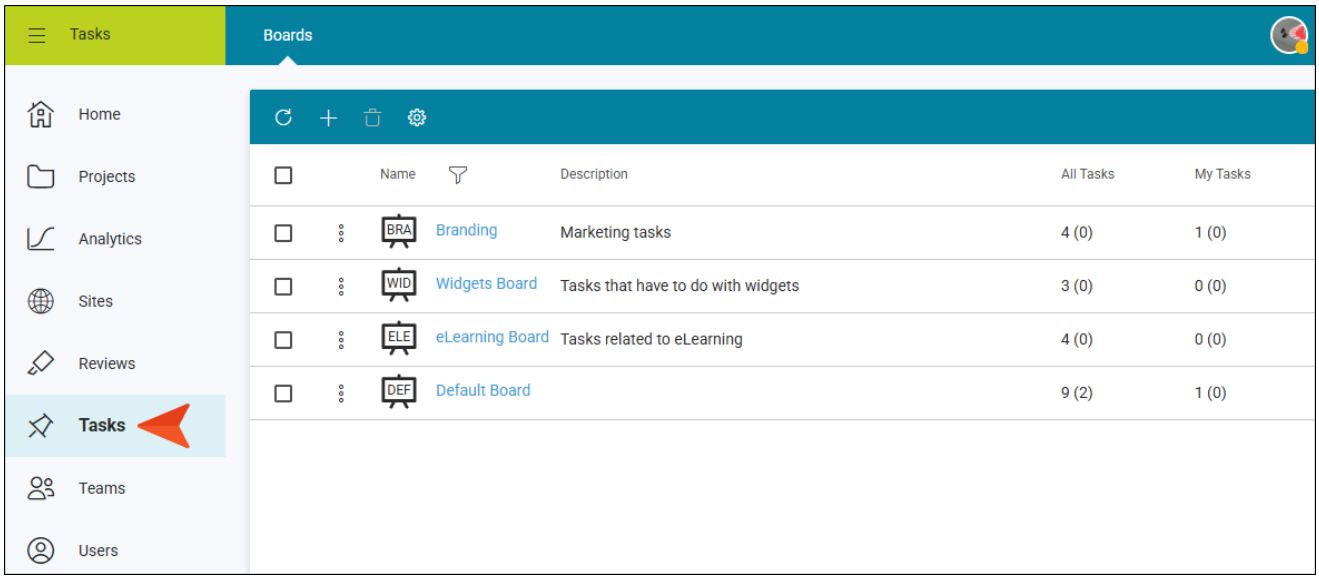
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CHAPTER 1

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.



Main Activities for Task Boards

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- "Editing Task Boards" on page 12
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Main Activities for Tasks

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CHAPTER 2

Main Activities for Task Boards

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

This chapter discusses the following:

Creating Task Boards 8
Editing Task Boards 12
Moving Tasks to Another Board 13
Deleting Task Boards 16

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:

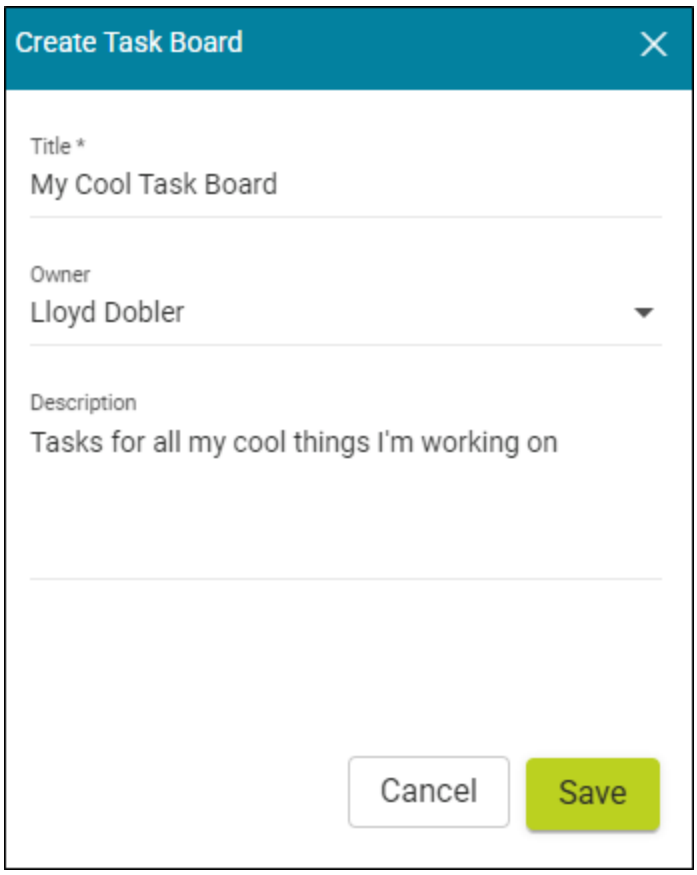


Without permission, you can only view tasks.

For more information about permissions, see the Help system.

How to Create a Task Board

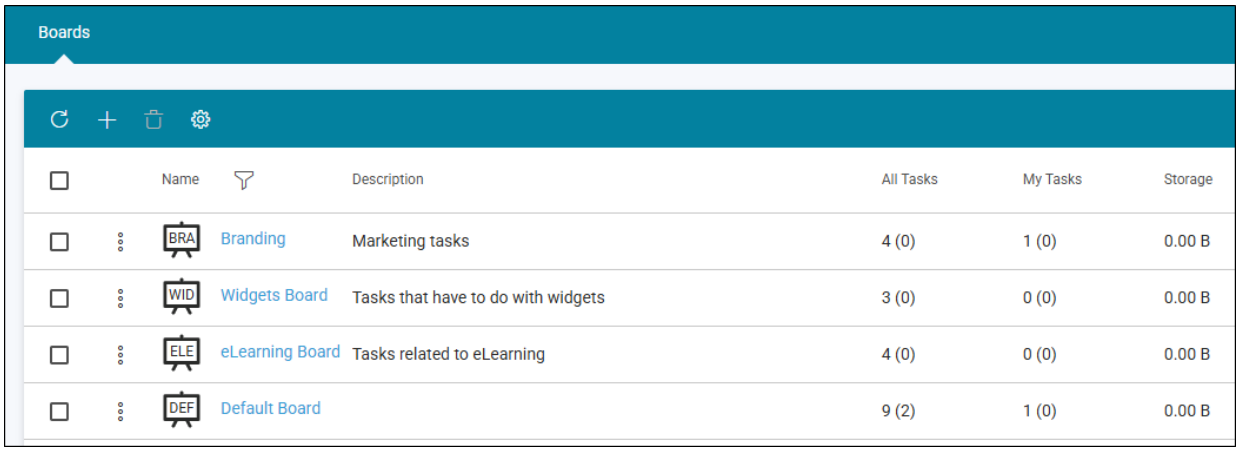
1. On the left side of the interface, click **Tasks**.
2. In the toolbar click .
3. Enter a title for the task board. You can also assign the board to a particular user and provide a description.



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.

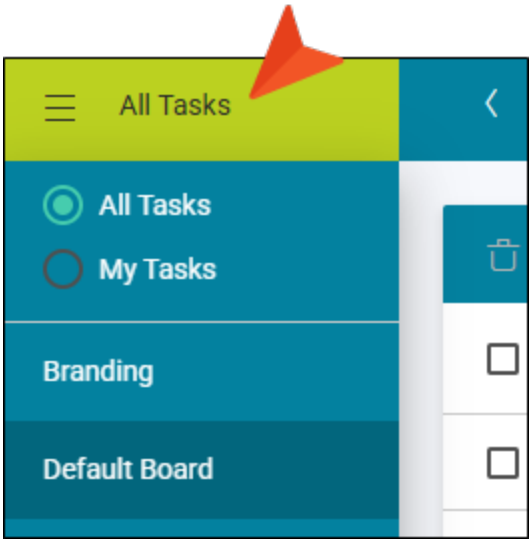
4. Click **Save**. The new board is added to the grid, which can show multiple columns of information about the board.

   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.

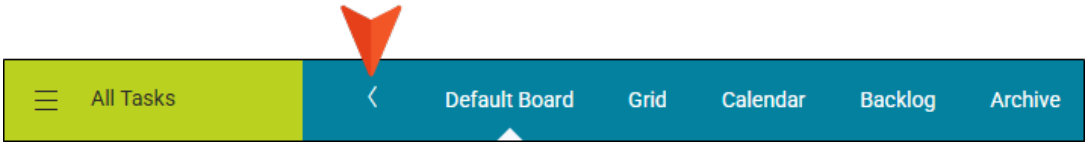


NOTE The various page views associated with tasks (the board, Grid, Calendar, Backlog, Archive) are unique for each task board.

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:

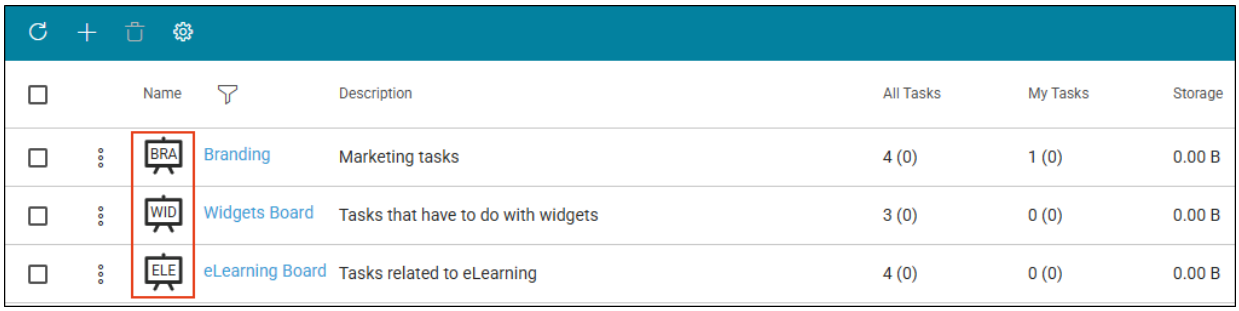


Without permission, you can only view tasks.

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.



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**.

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:

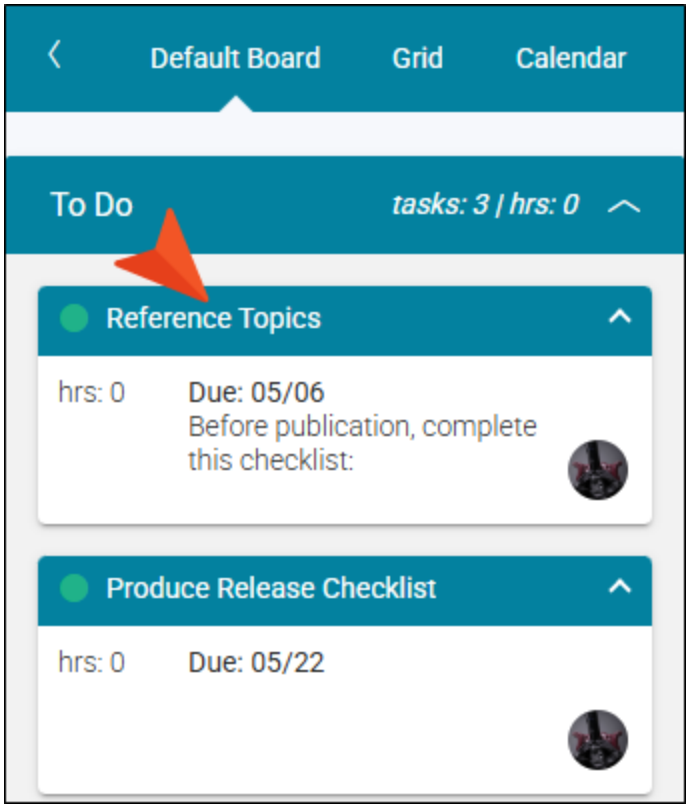


Without permission, you can only view tasks.

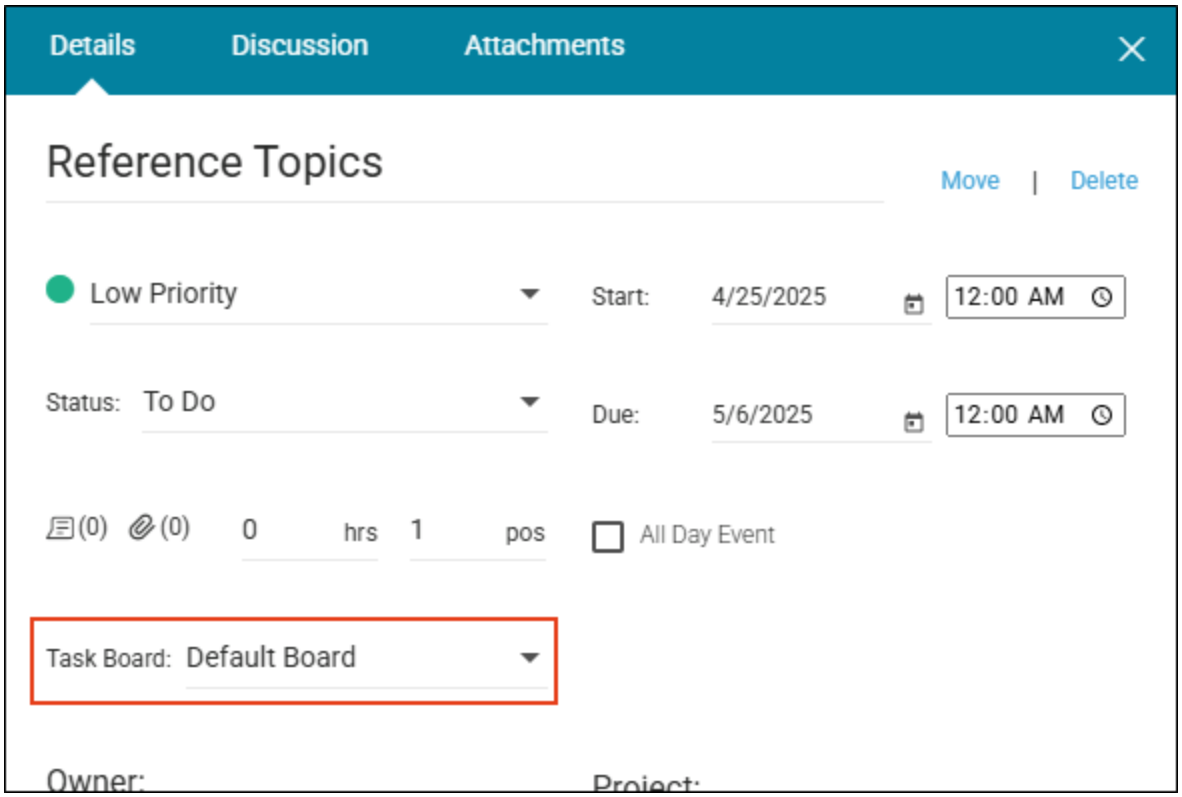
For more information about permissions, see the Help system.

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.



5. Click **Save**.

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:

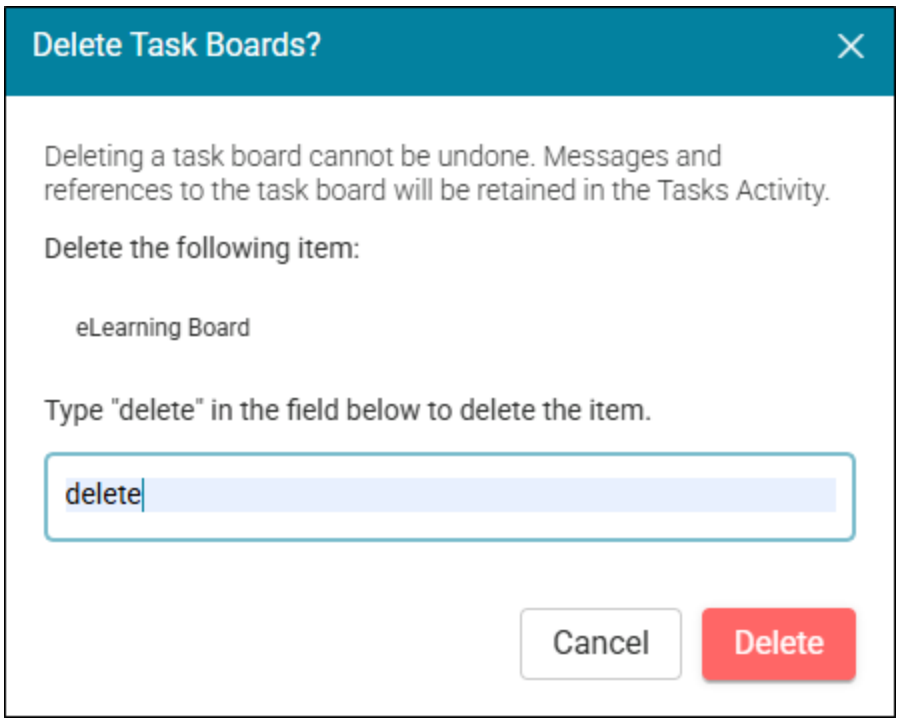


Without permission, you can only view tasks.

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

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:

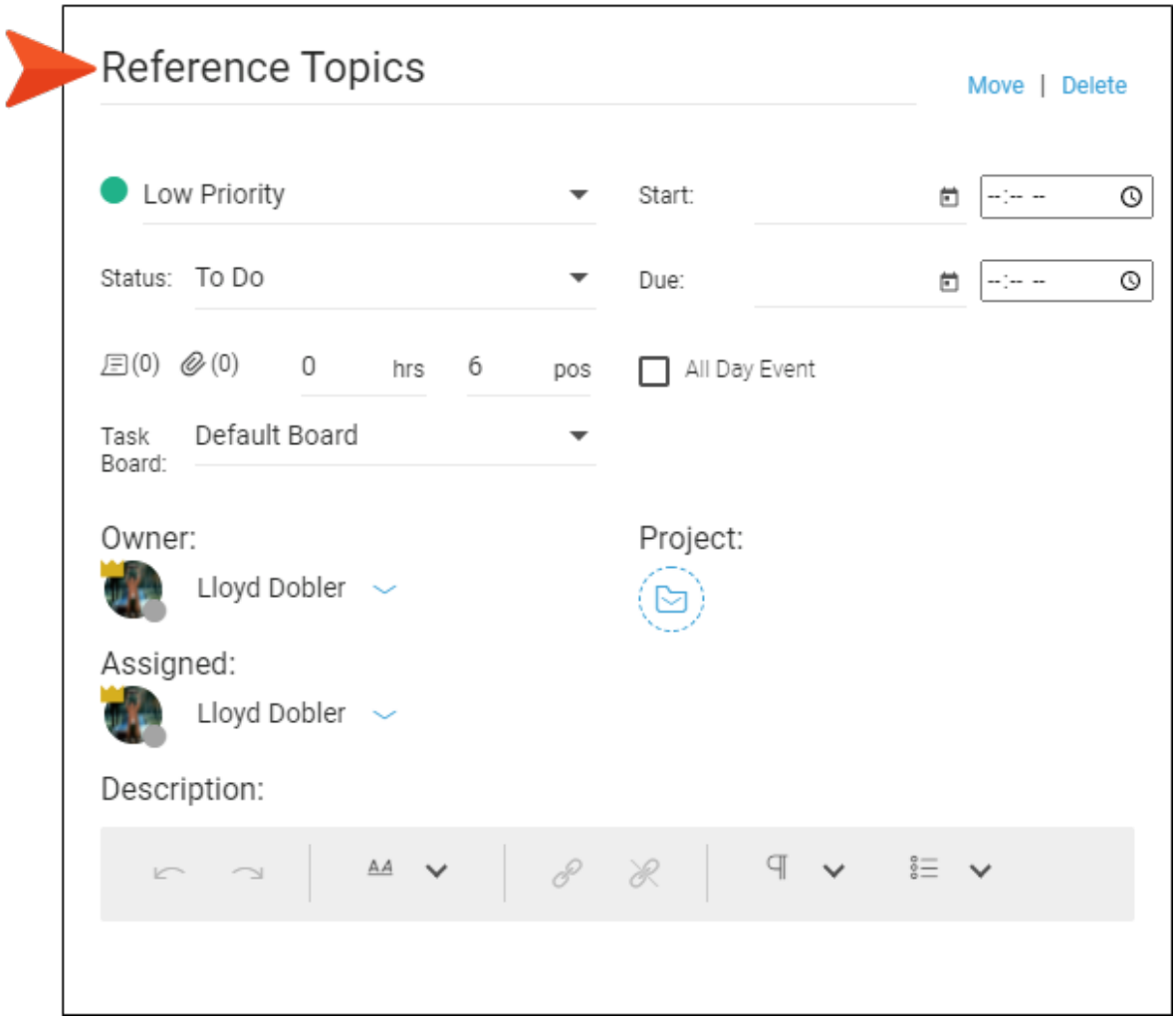


Without permission, you can only view tasks.

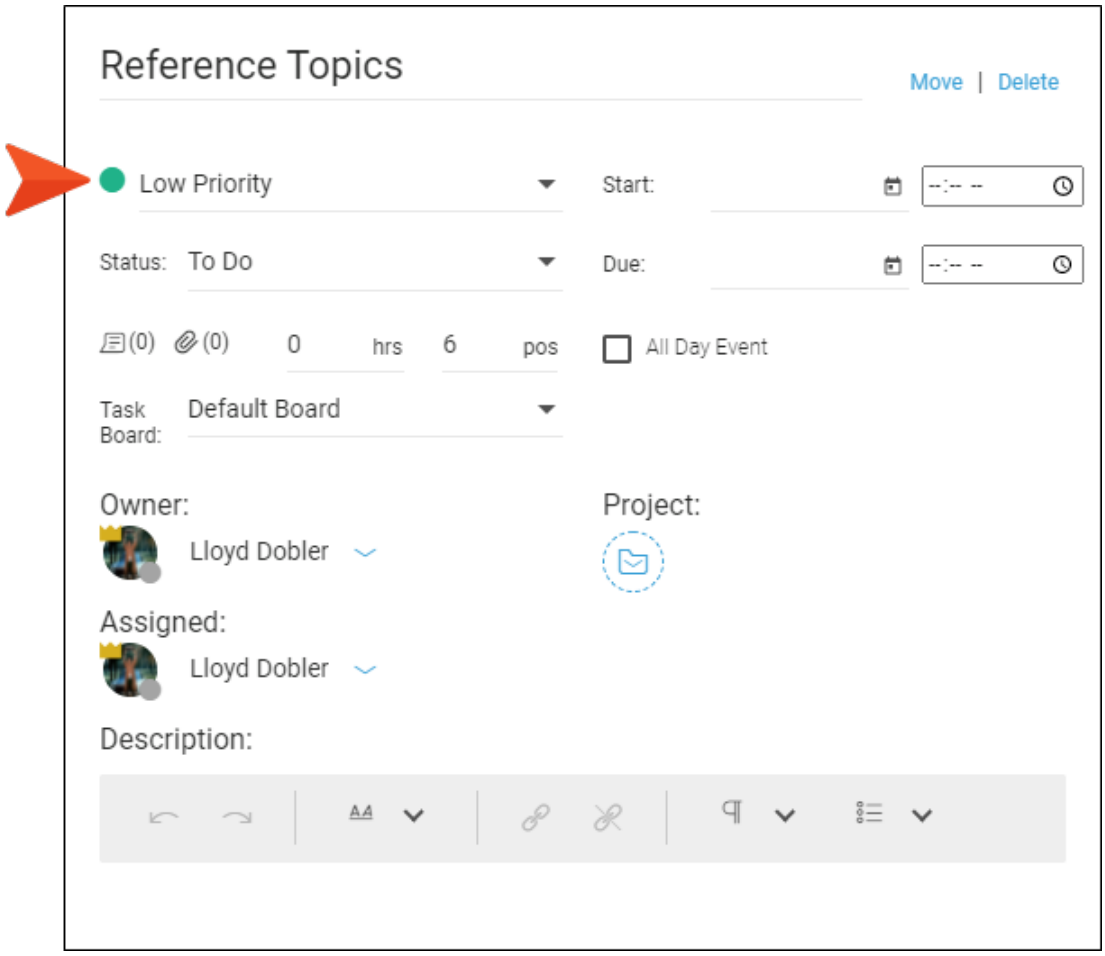
For more information about permissions, see the Help system.

How to Create a Task

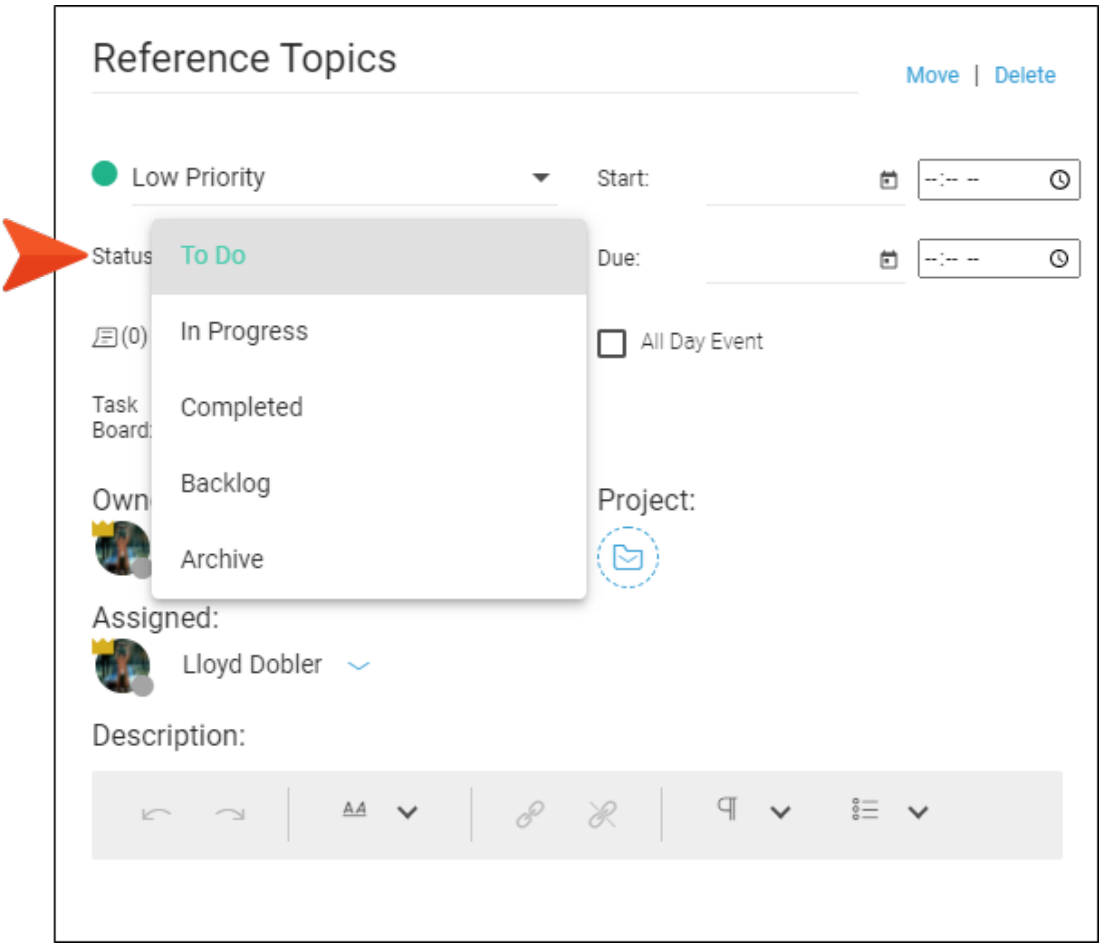
1. On the left side of the interface, click **Tasks**.
2. In the grid, select a task board. If no boards display, you might have to create a board and add tasks to it.
3. In the toolbar click .
4. At the top, on the **Details** tab, enter a title for the task.



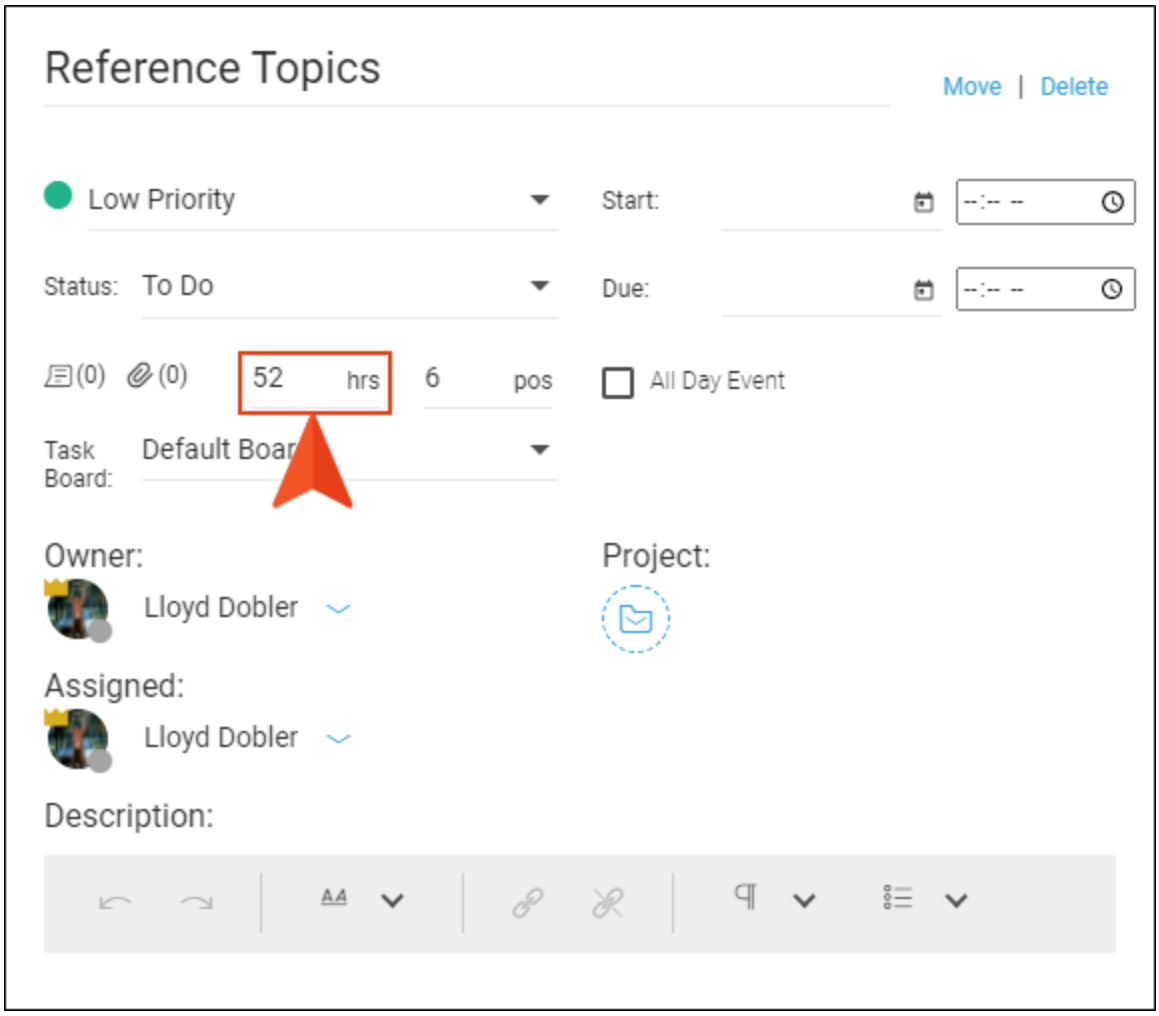
5. (Optional) Complete any of the other fields in the dialog:
    - [Priority Level] Click in this field and select a level—Low Priority, Medium Priority, or High Priority. Each priority level is indicated by a color, which is shown in the task card:
        - Low=Green
        - Medium=Yellow
     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



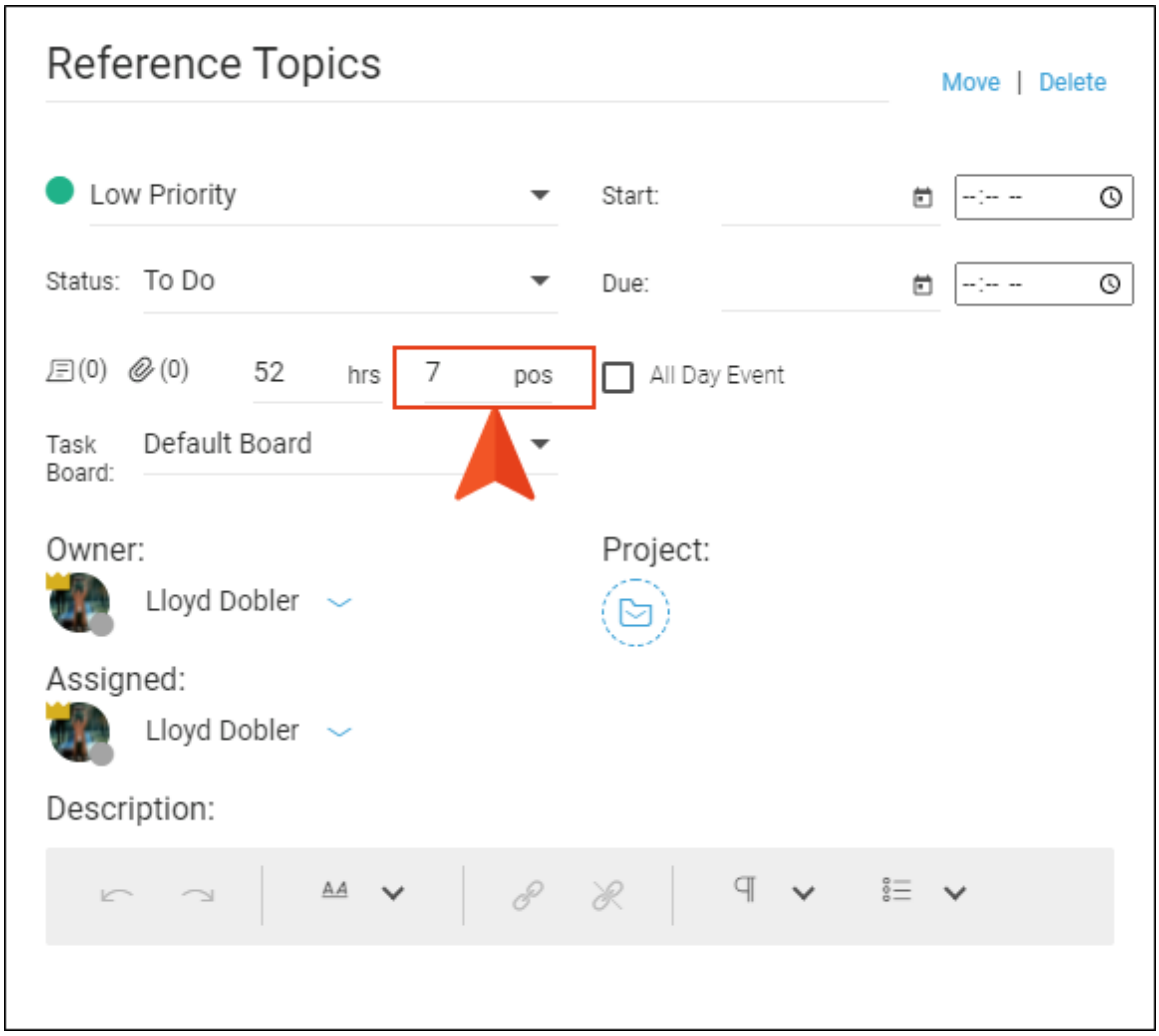
- **Status** You can select the milestone or location for the task. A new task is automatically placed in the To Do milestone.



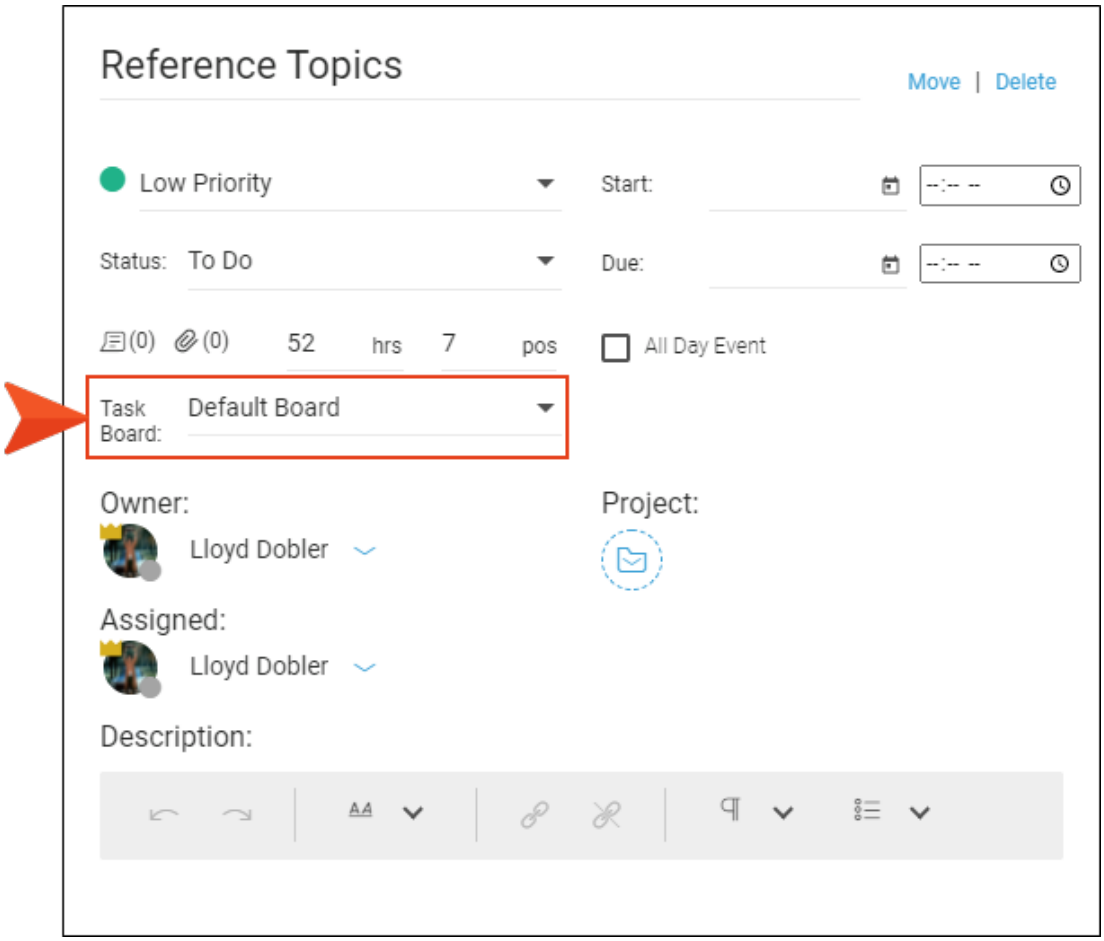
- [Estimated Hours] You can enter an estimated number of hours for the task.



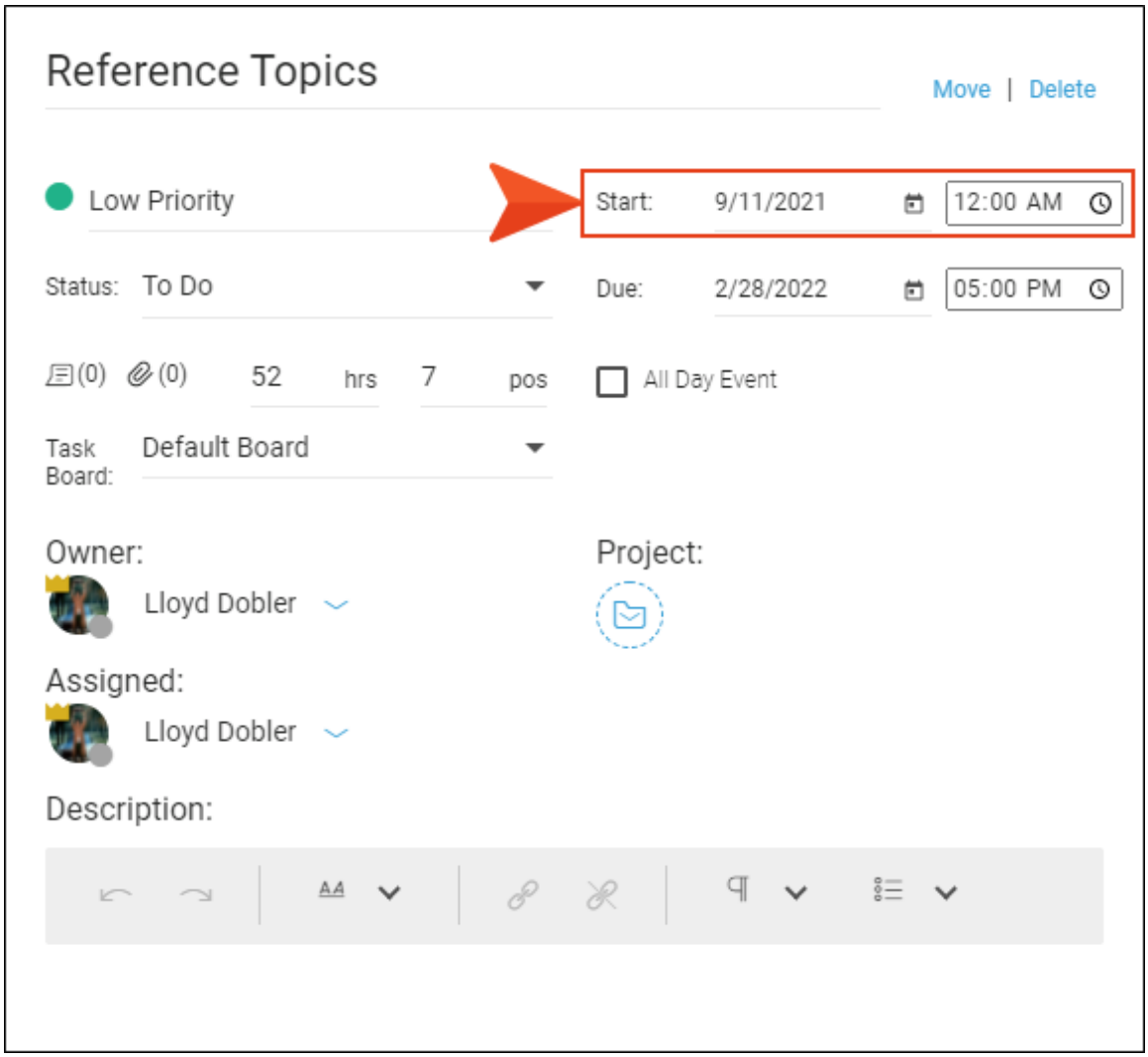
- [Position] You can choose the position of the task in the milestone (e.g., 1 is the top). By default, new tasks are placed at the bottom of the milestone unless you specify otherwise. For example, if the milestone currently has six existing tasks in it, the new task will have a position of 7.



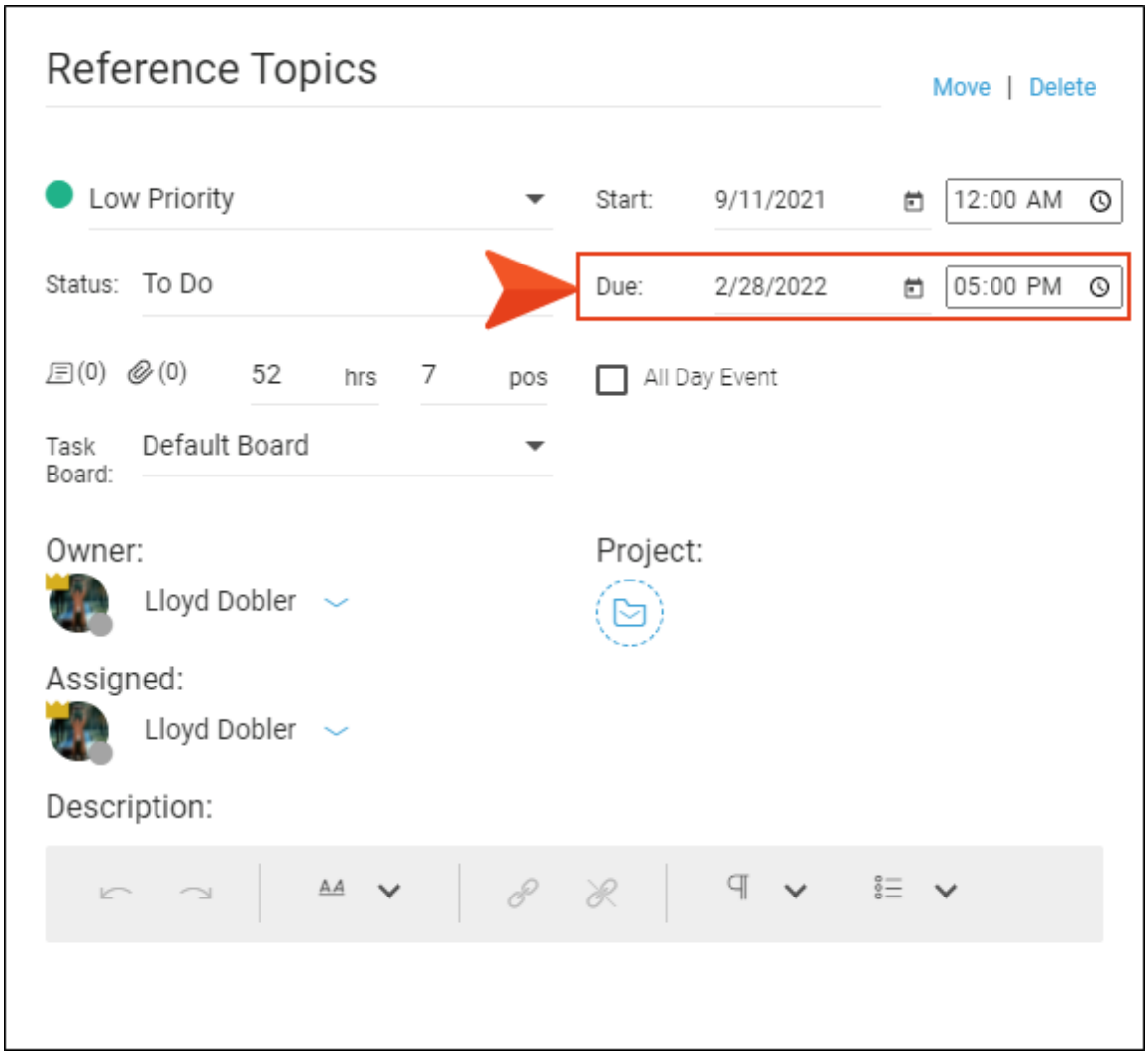
- **Task Board** You can choose a different task board to hold the task.



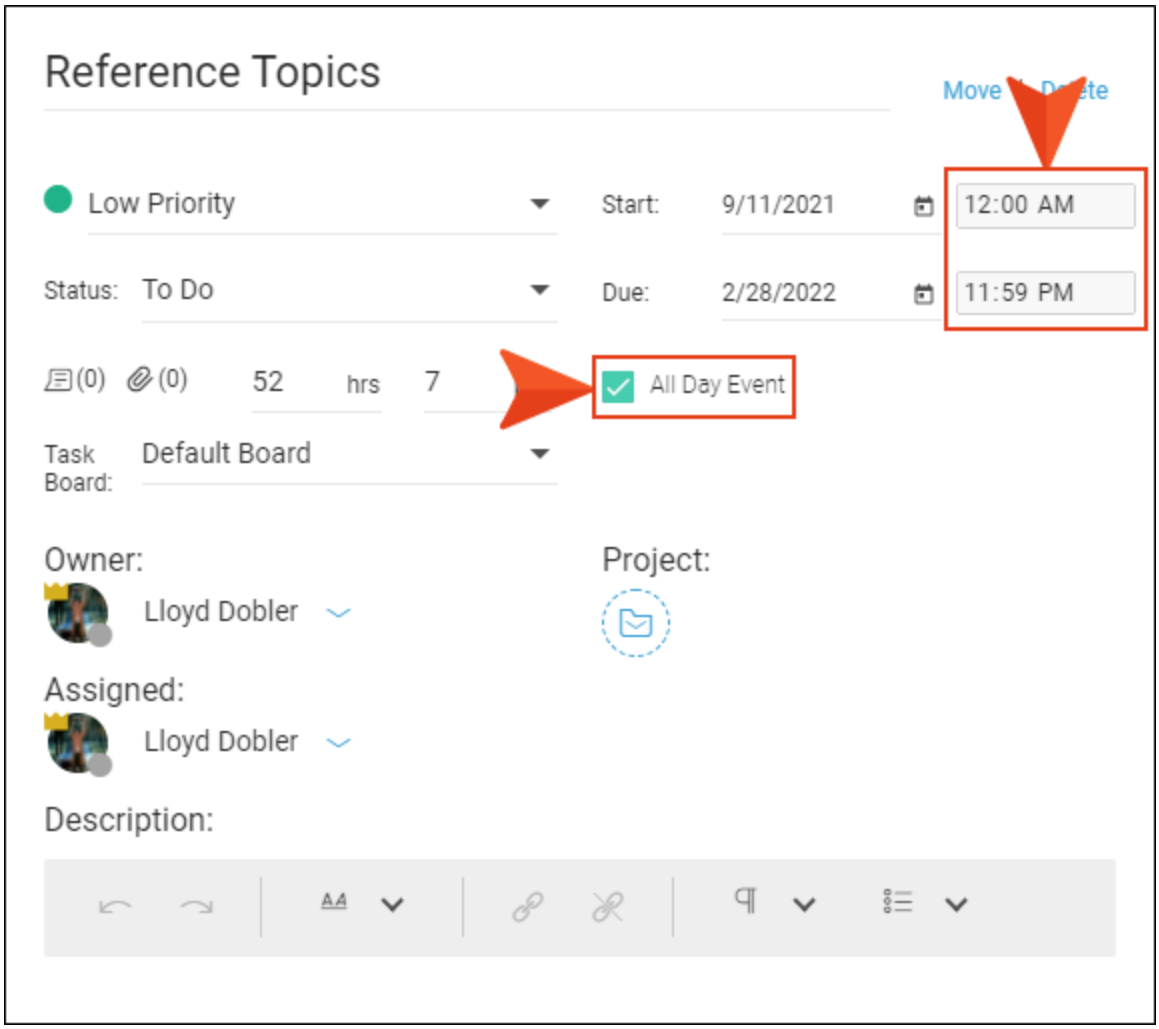
- **Start** You can select the date and time when the task should be started. This date is used when looking at the task in Calendar view.



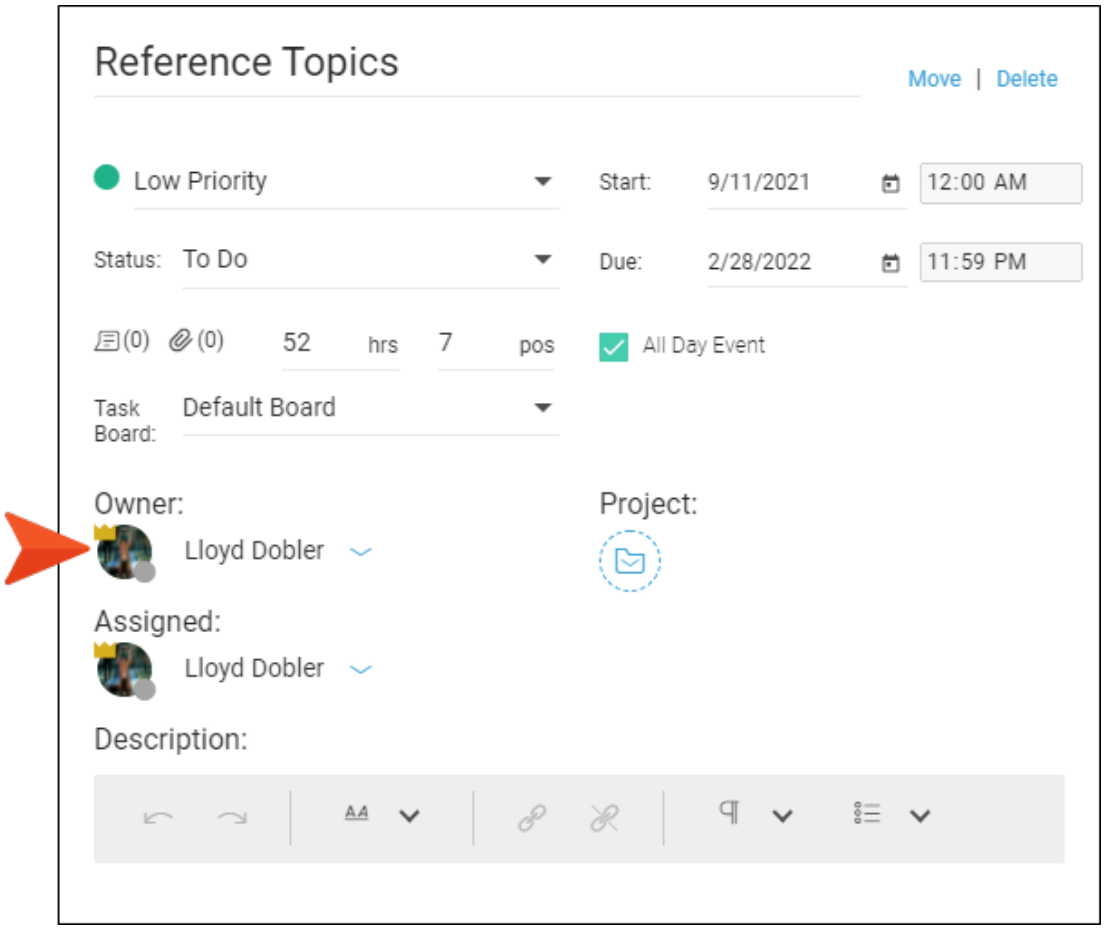
- **Due** You can select the date and time when the task is due. This date is used when looking at the task in Calendar view. When a task is past the due date (and not yet completed), the text turns red.



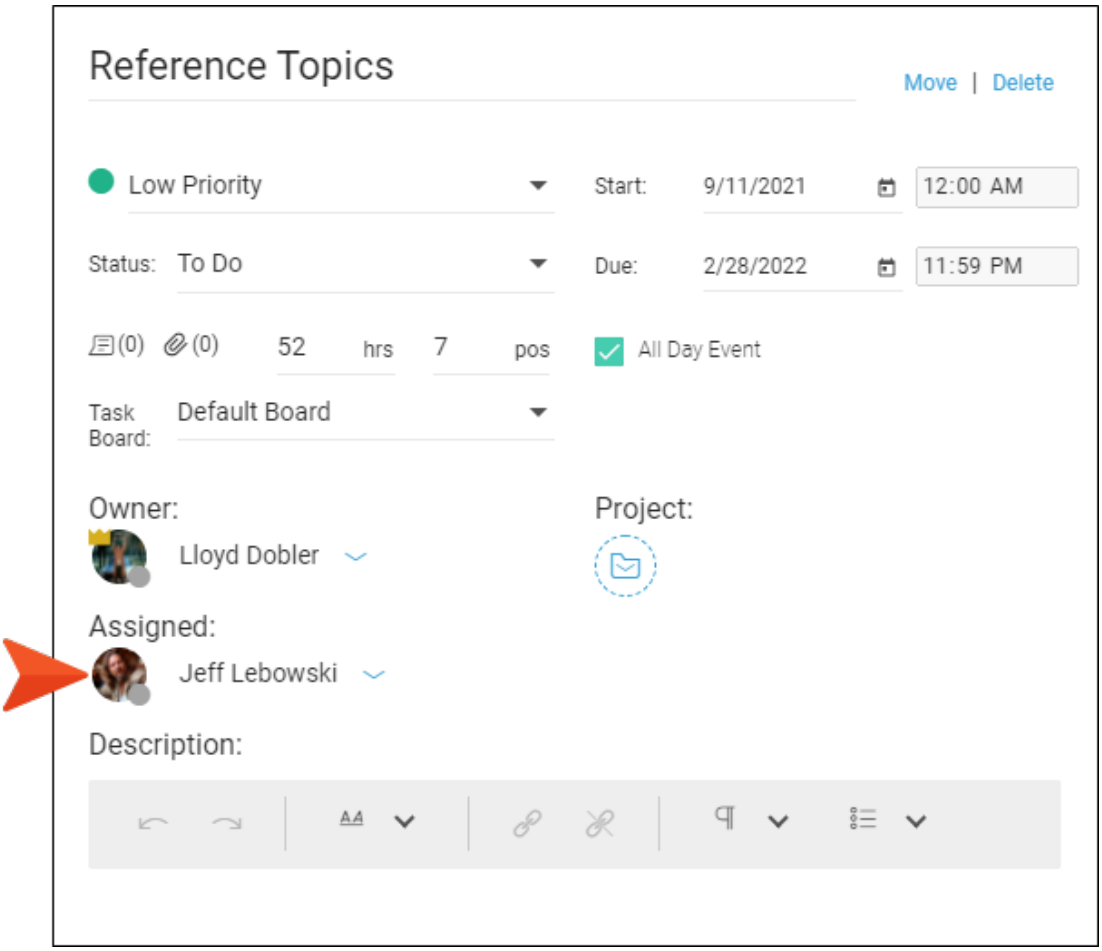
- All Day Event Select this if you want the task to automatically select all of the time for each day in the date range, from 12:00 AM to 11:59 PM.



- **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.

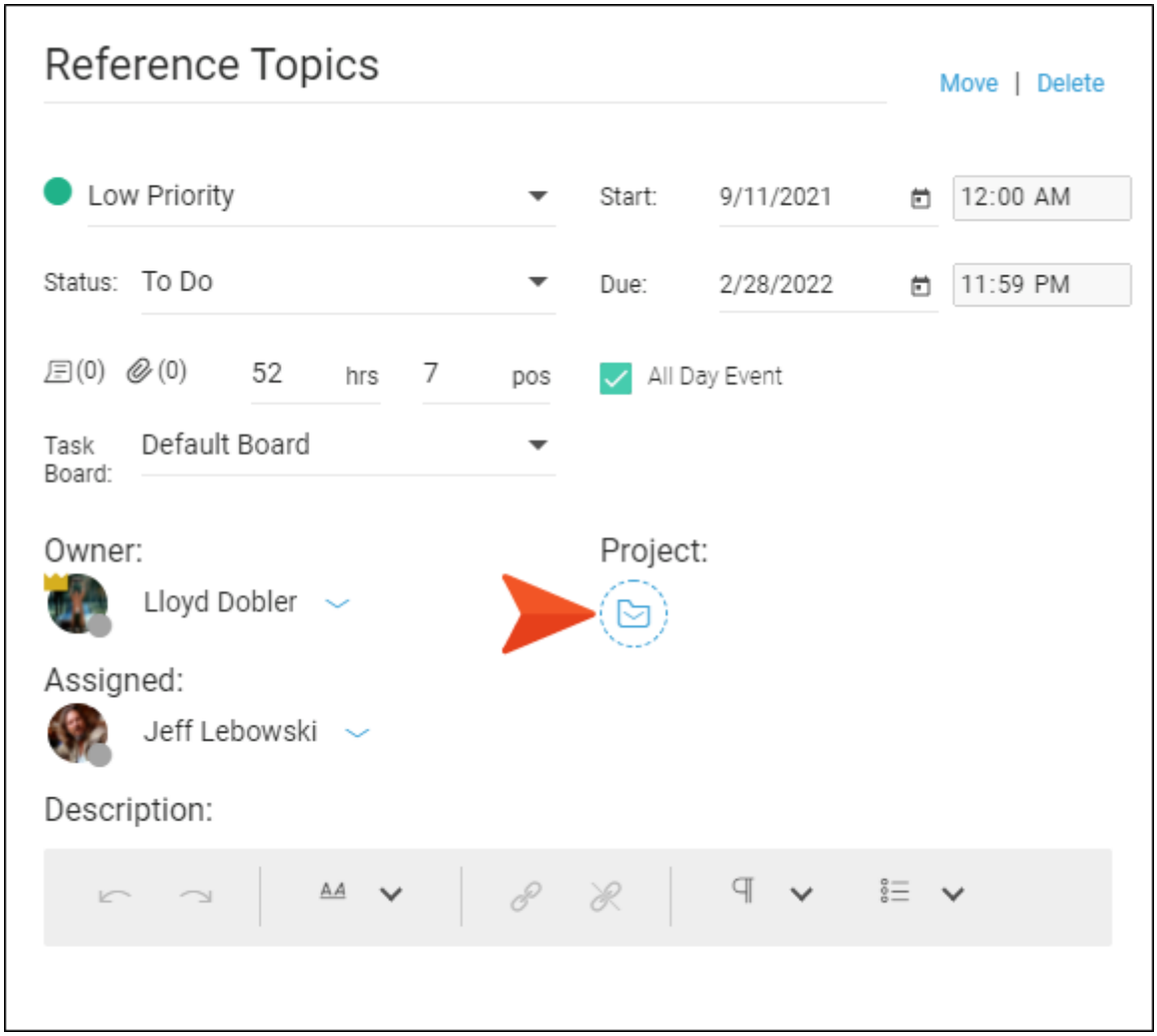


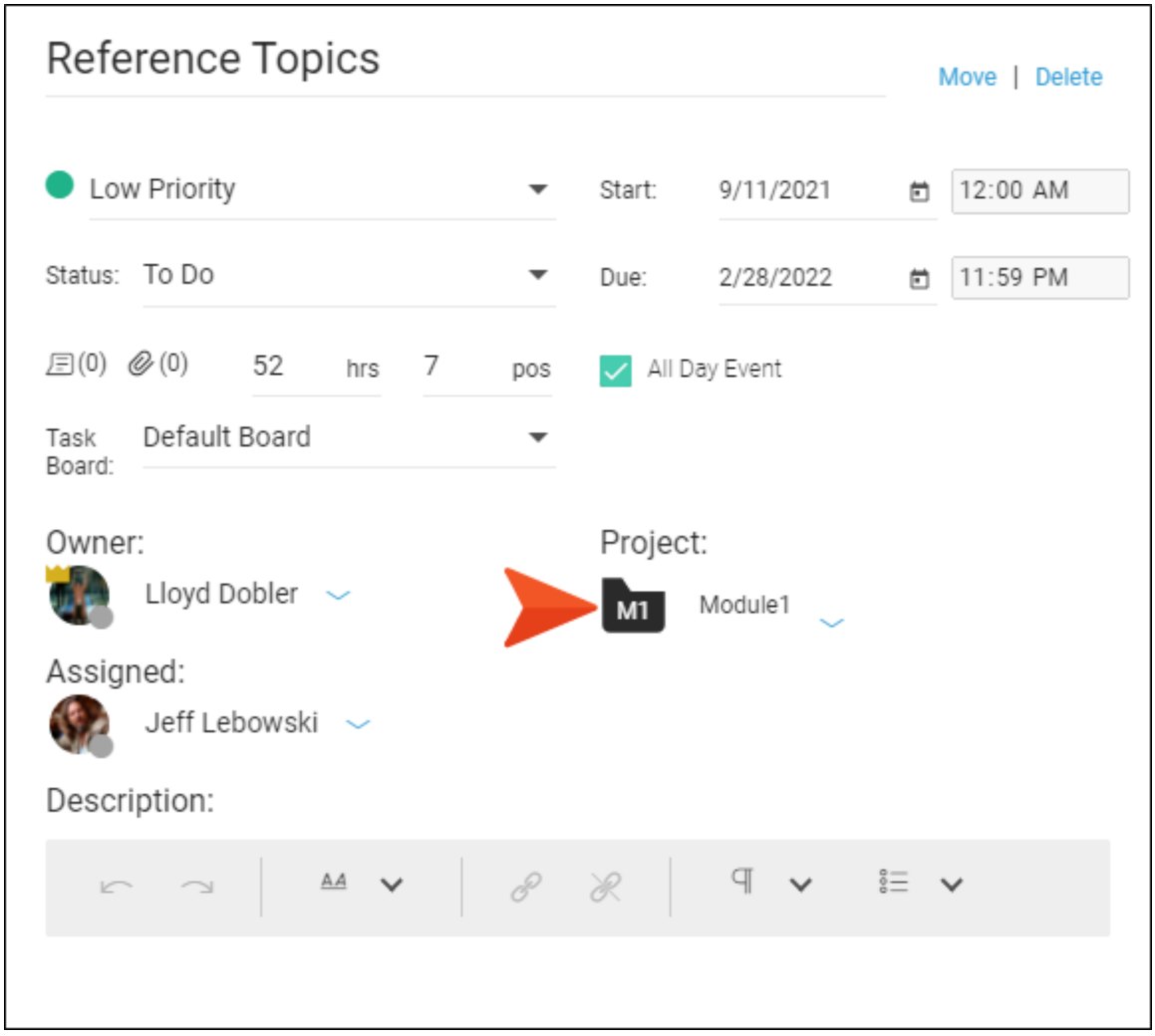
- **Assigned** You can click the down arrow to assign the task to a user. By default a new task is assigned to yourself.



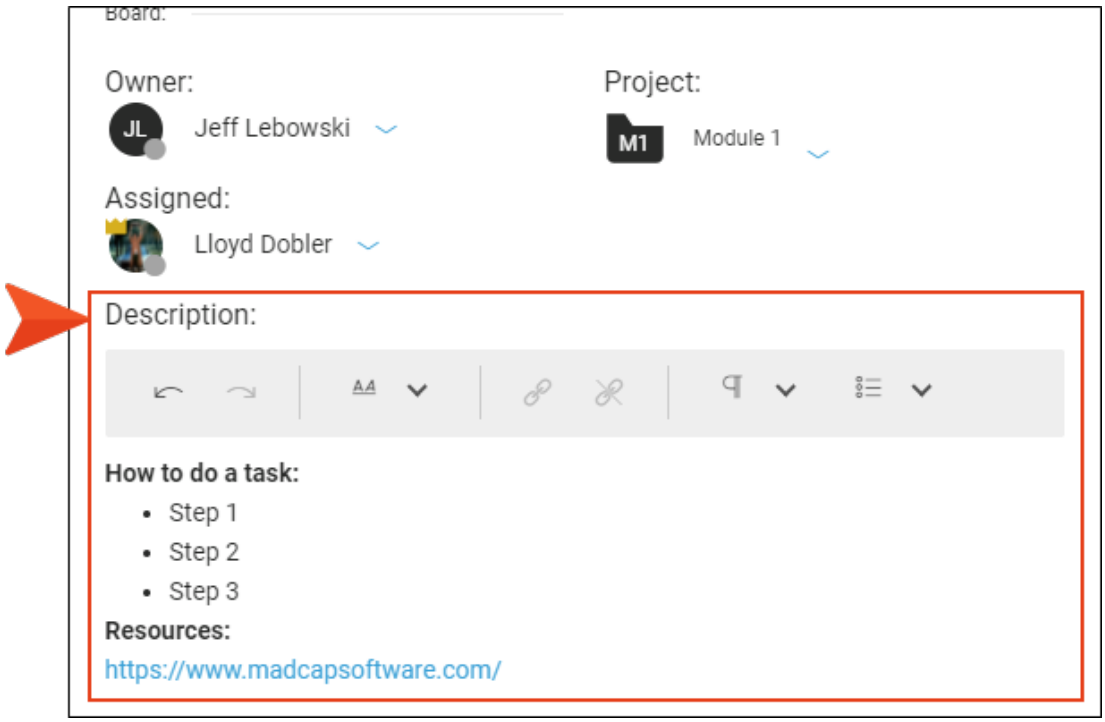
> **NOTE** A task can be assigned to only one person.

- **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.

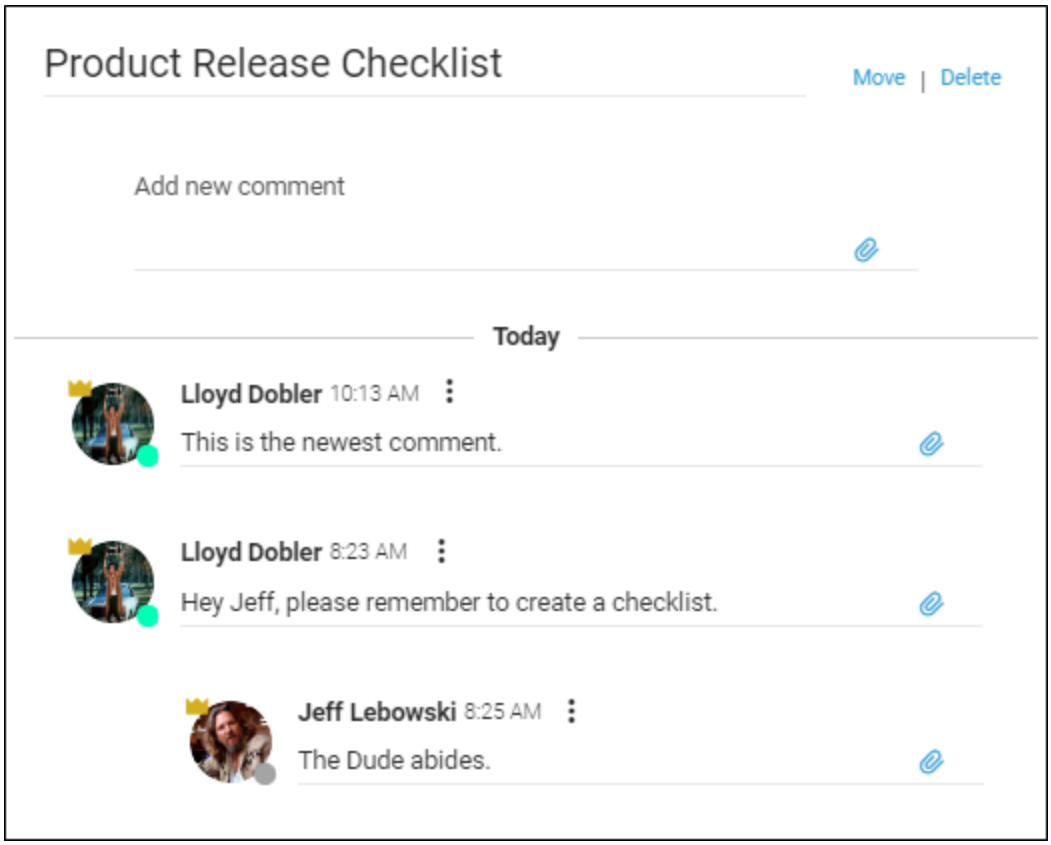



Reference Topics
Move | Delete
Low Priority
Start: 9/11/2021 12:00 AM
Status: To Do
Due: 2/28/2022 11:59 PM
(0) (0) 52 hrs 7 pos
All Day Event
Task Board: Default Board
Owner:
Lloyd Dobler
Project:
M1
Module1
Assigned:
Jeff Lebowski
Description:

- **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.

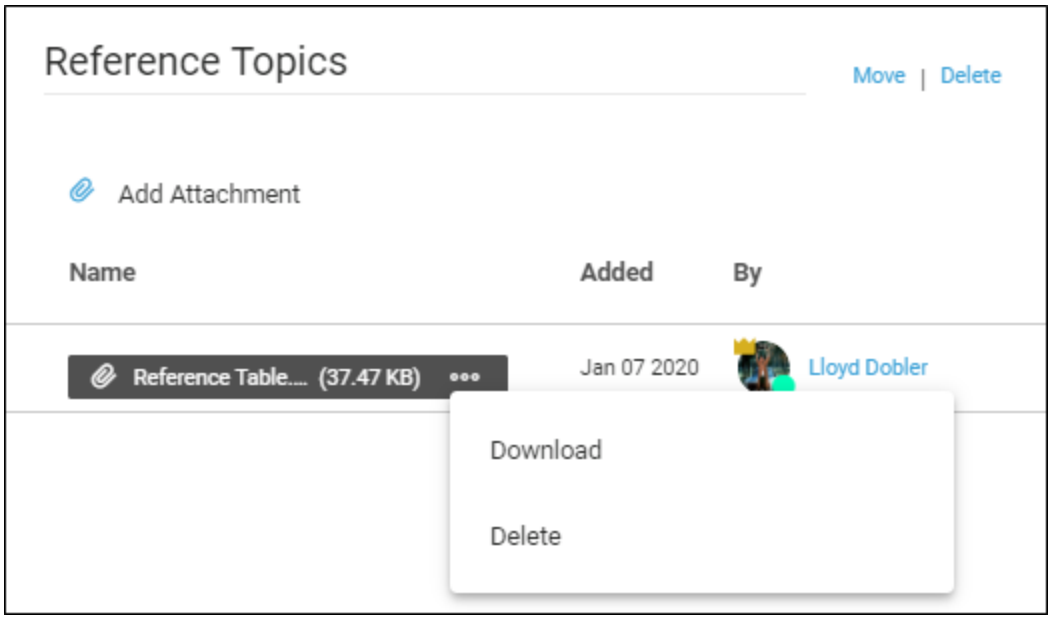


6. (Optional) At the top of the dialog, select **Discussion**. You can use this area to add comments and maintain a conversation with others about the task.



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

7. (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.



8. 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:



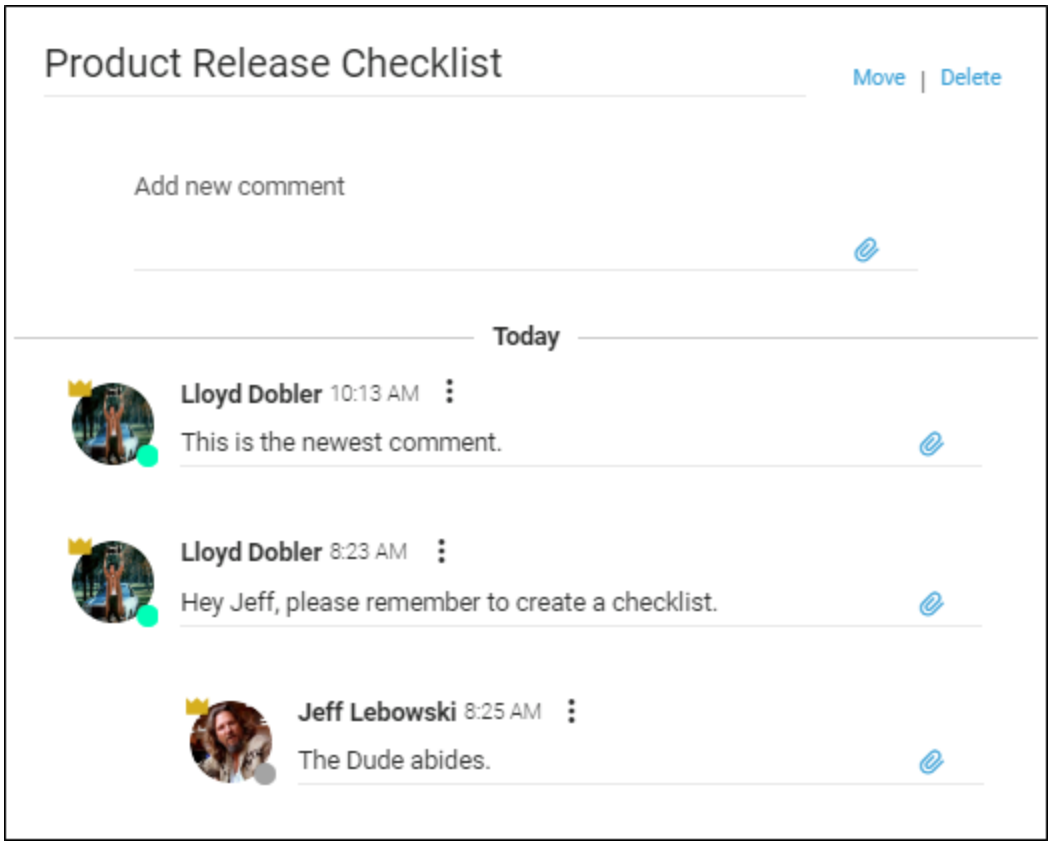
Without permission, you can only view tasks.

For more information about permissions, see the Help system.

How to Edit a Task

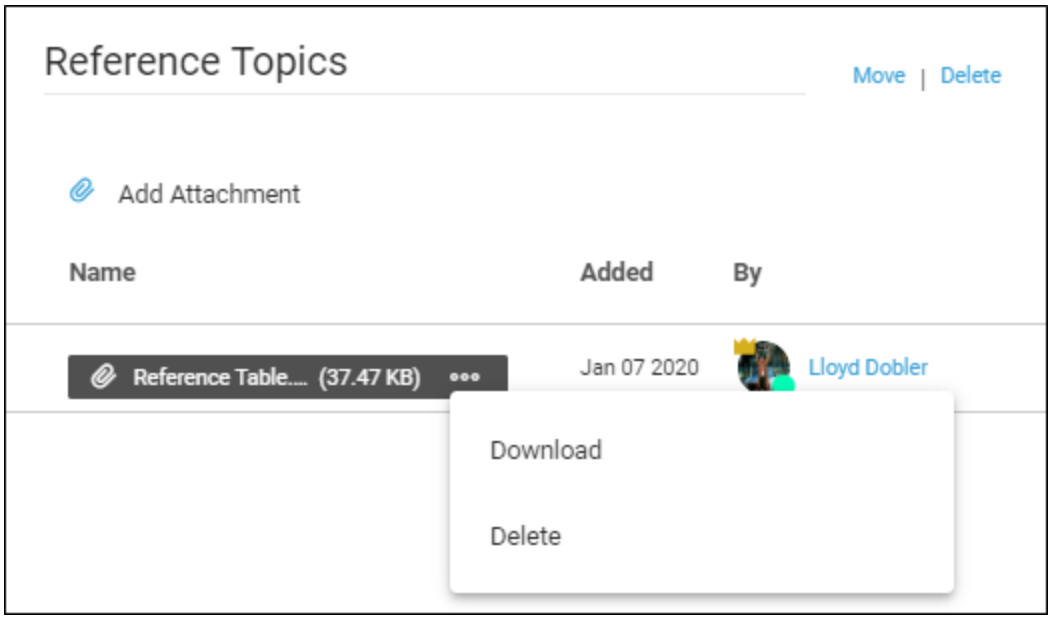
1. On the left side of the interface, click **Tasks**.
2. In the **Boards** grid, click the name of the task board holding the task. If no boards display, you might have to create a board and add tasks to it.
3. Locate the task card and click its name.
4. At the top of the dialog, on the **Details** 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.

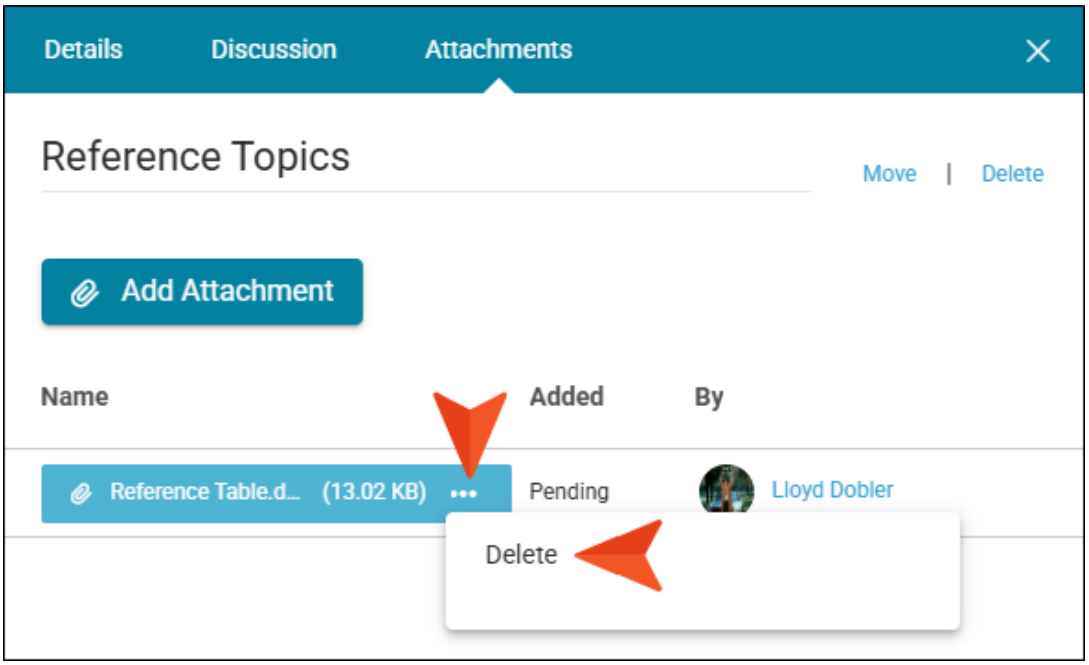
7. (Optional) At the top of the dialog, select **Attachments**. You can use this tab to associate one or more files with the task. Others can then click the ellipsis next to an attachment to download it.



8. 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**.



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?

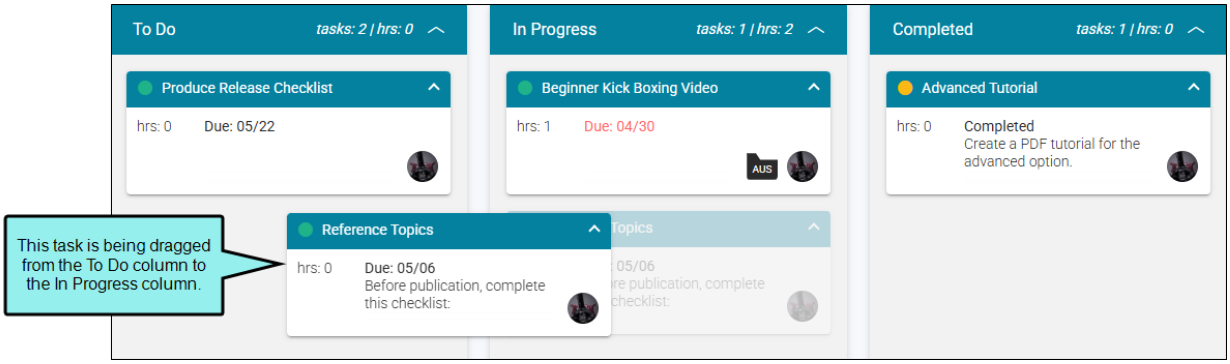
To move a task to a milestone, or to the Archive or Backlog, you must have the following permission setting:



For more information about permissions, see the Help system.

How to Move Tasks to Milestones by Dragging

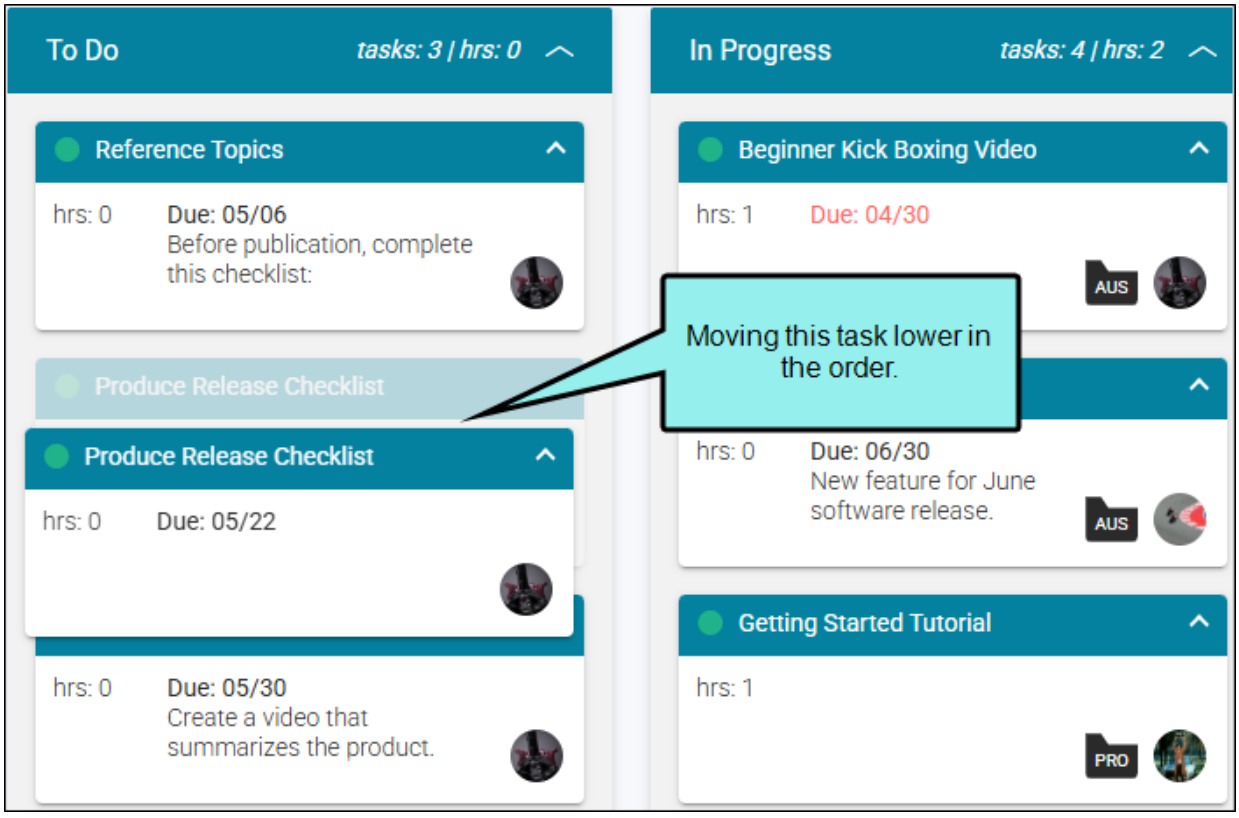
1. On the left side of the interface, click **Tasks**.
2. In the **Boards** grid, click the name of the task board holding the task.
3. Locate the task card, then click and drag it to one of the other milestone columns (To Do, In Progress, Completed).

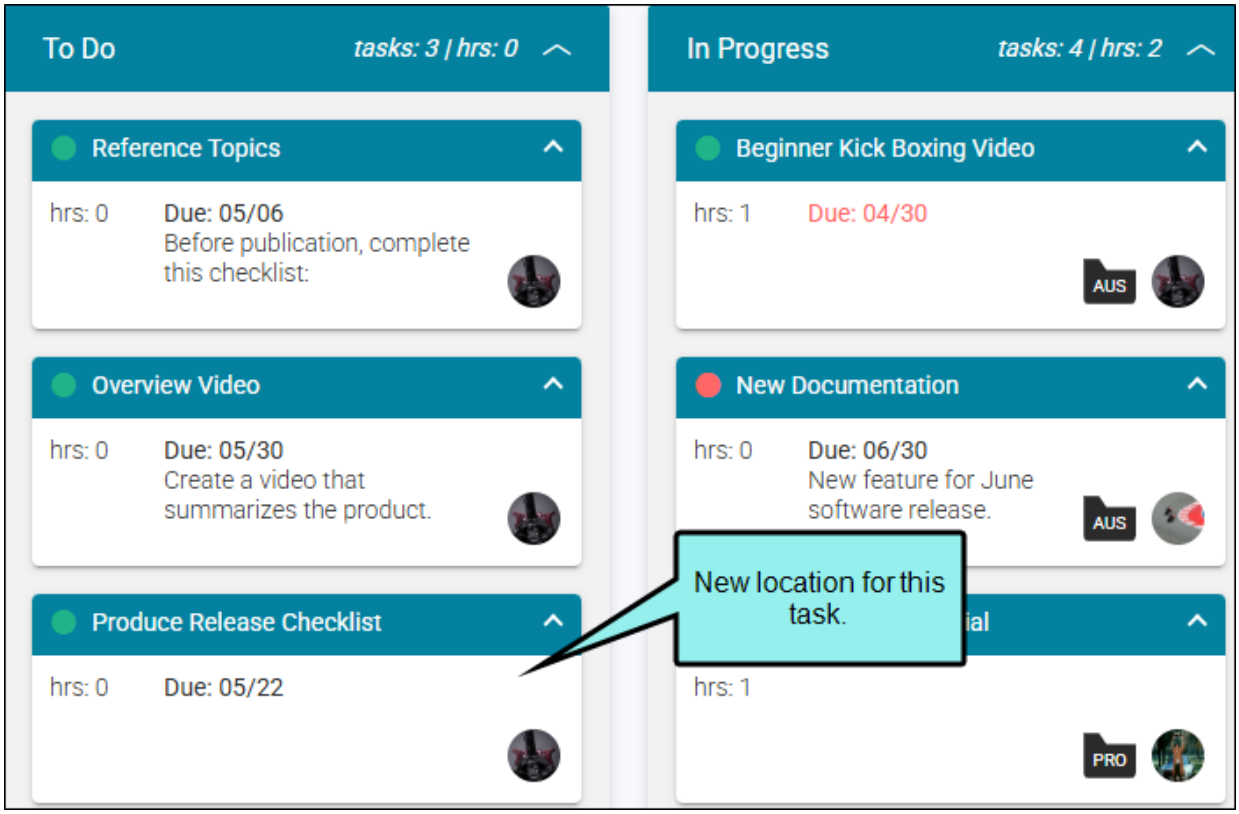


> **NOTE** You cannot drag tasks to the Archive or Backlog area. You can only drag them to the milestone columns.

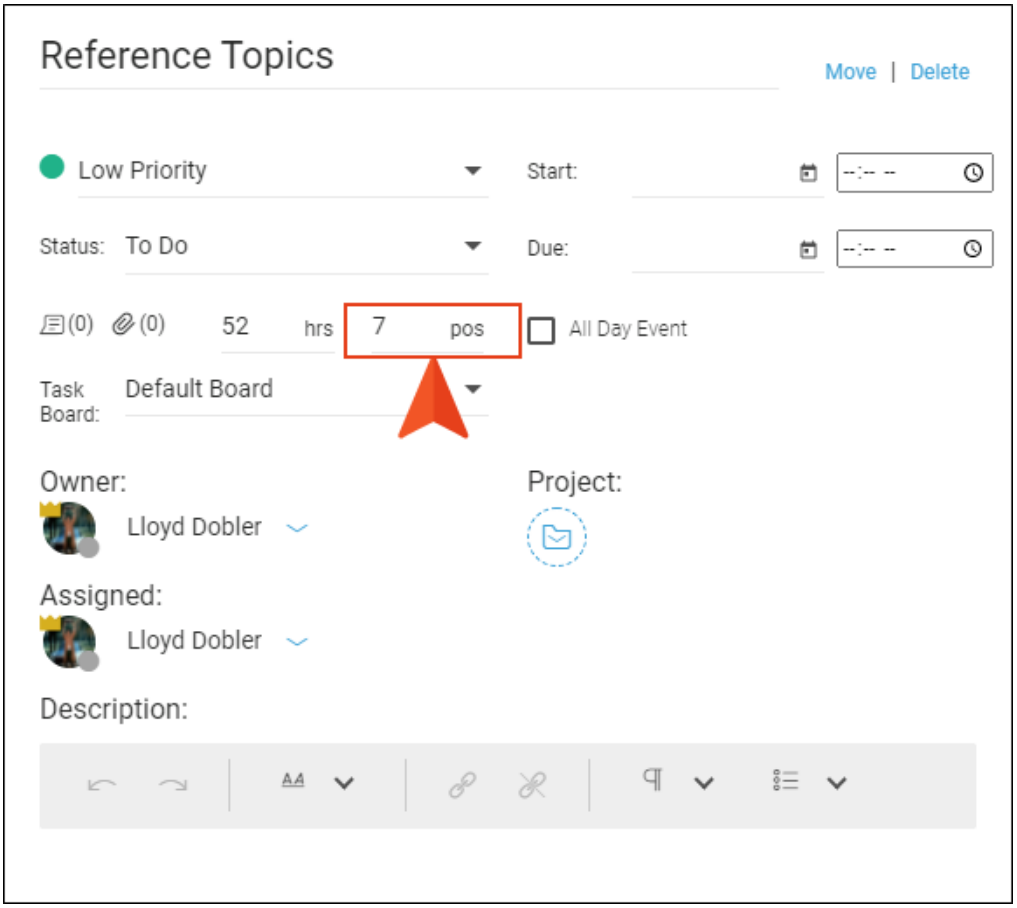
How to Move Tasks to Change the Order

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.



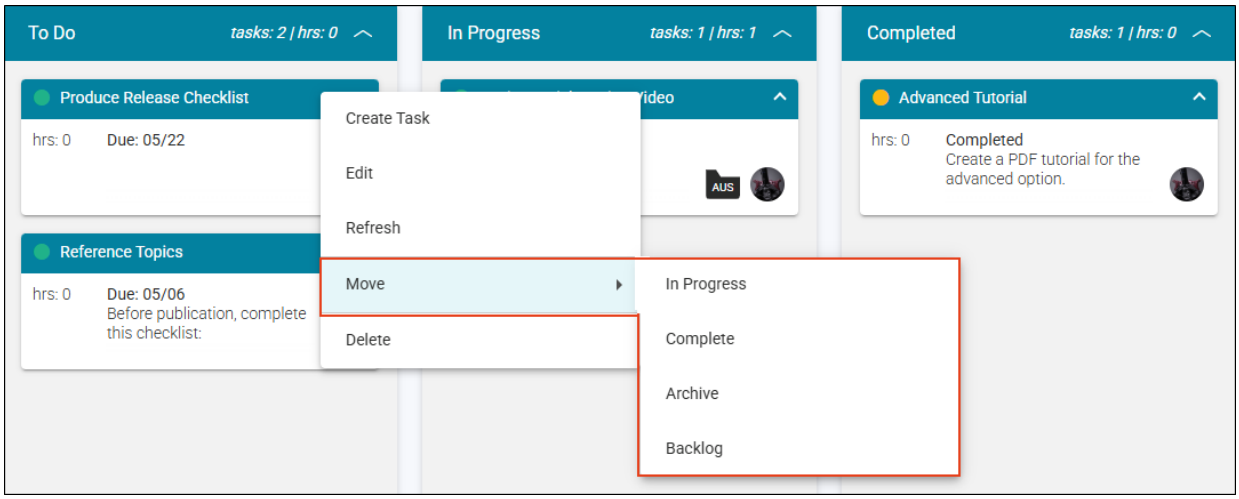

To Do
tasks: 3 / hrs: 0
In Progress
tasks: 4 / hrs: 2
Reference Topics
hrs: 0
Due: 05/06
Before publication, complete this checklist:
Beginner Kick Boxing Video
hrs: 1
Due: 04/30
AUS
Overview Video
hrs: 0
Due: 05/30
Create a video that summarizes the product.
New Documentation
hrs: 0
Due: 06/30
New feature for June software release.
AUS
New location for this task.
Produce Release Checklist
hrs: 0
Due: 05/22
ial
hrs: 1
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)



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.

Filtering Tasks

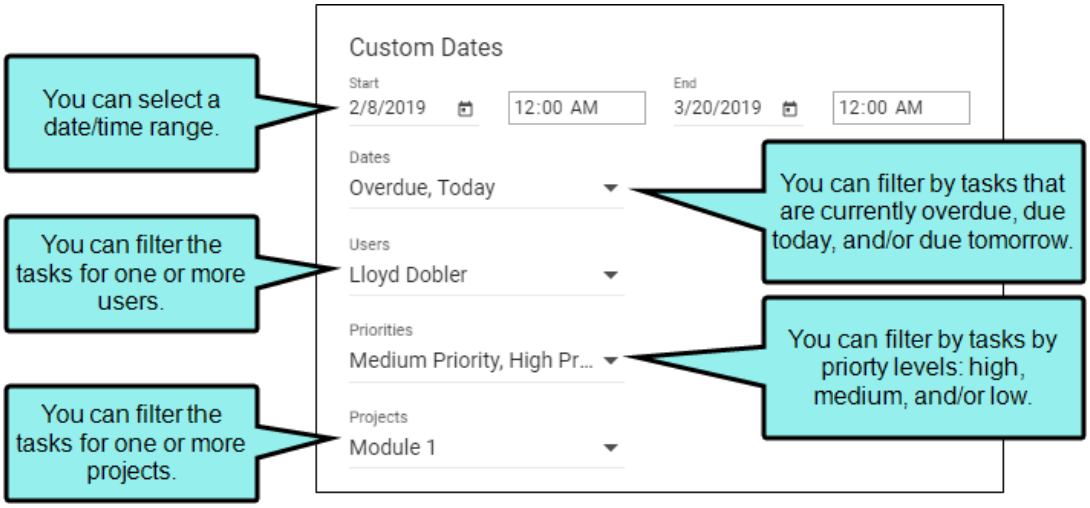
When viewing tasks, you can use several filter options to limit the tasks shown and make it easier to find what you're looking for.

Permission Required?

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

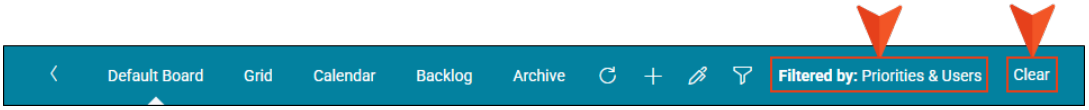
How to Filter Tasks

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**.

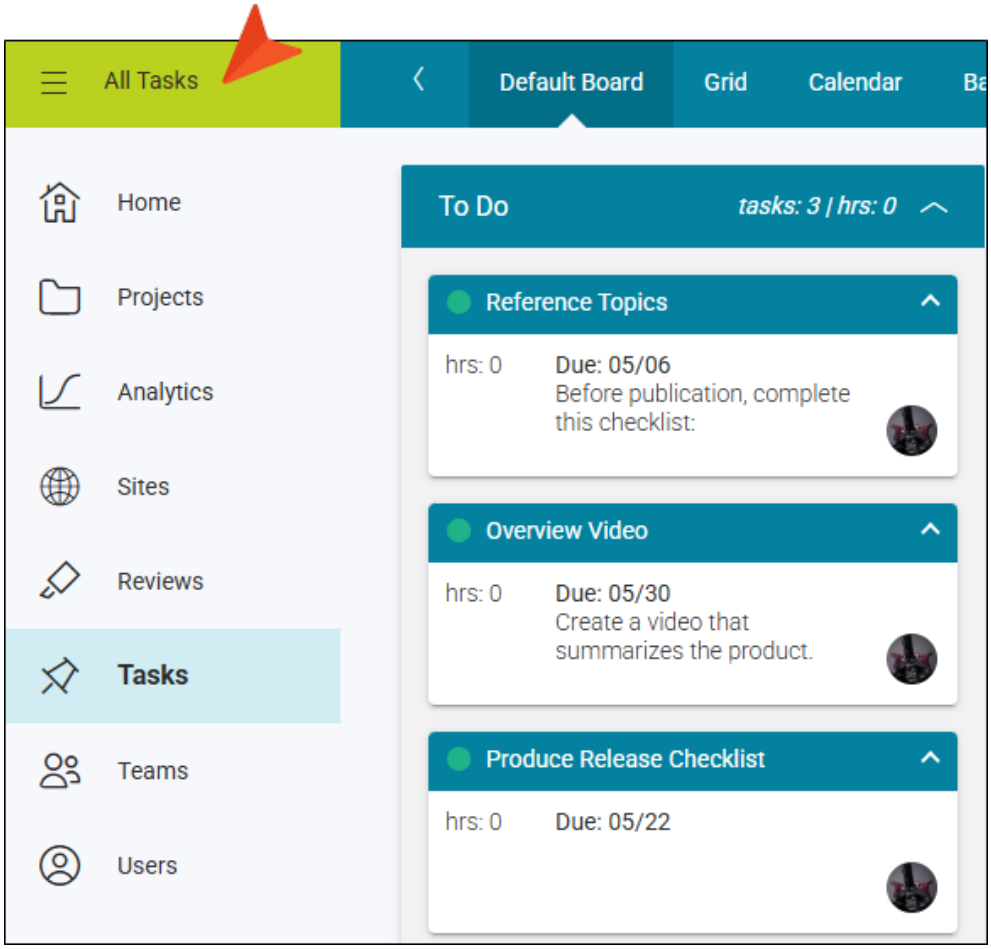
> **NOTE** When a filter is applied, the local toolbar changes slightly. A "filtered by" summary displays to quickly indicate the filter type, and a button to clear the filters. Select **Clear** to remove the filter(s).



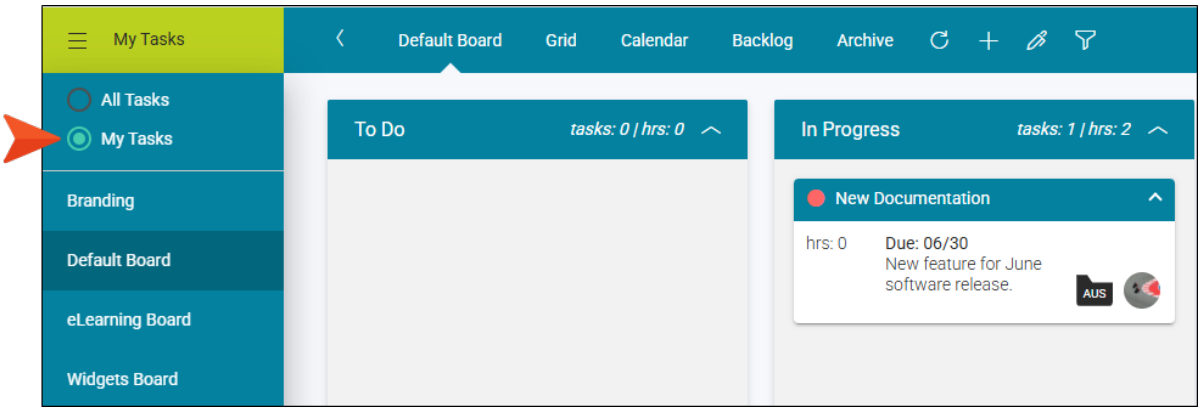
How to Switch Between All Tasks and My Tasks

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

Viewing Task Details

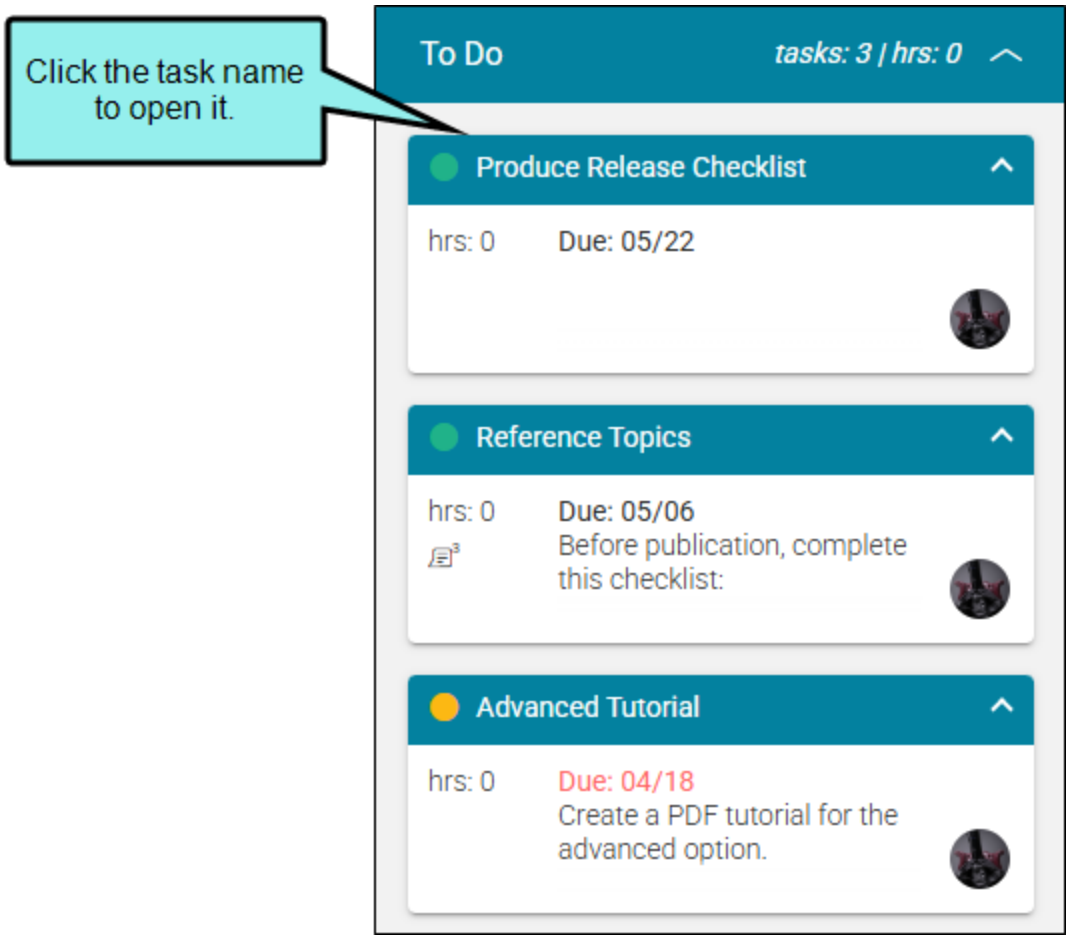
When working in any of the views on the Tasks page, anyone can click a task to view its details. From here, you can take various actions (e.g., move, edit, delete, add attachments, add comments) on the task, as long as you have the “Create/Edit Tasks” permission.

Permission Required?

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

How to View Task Details

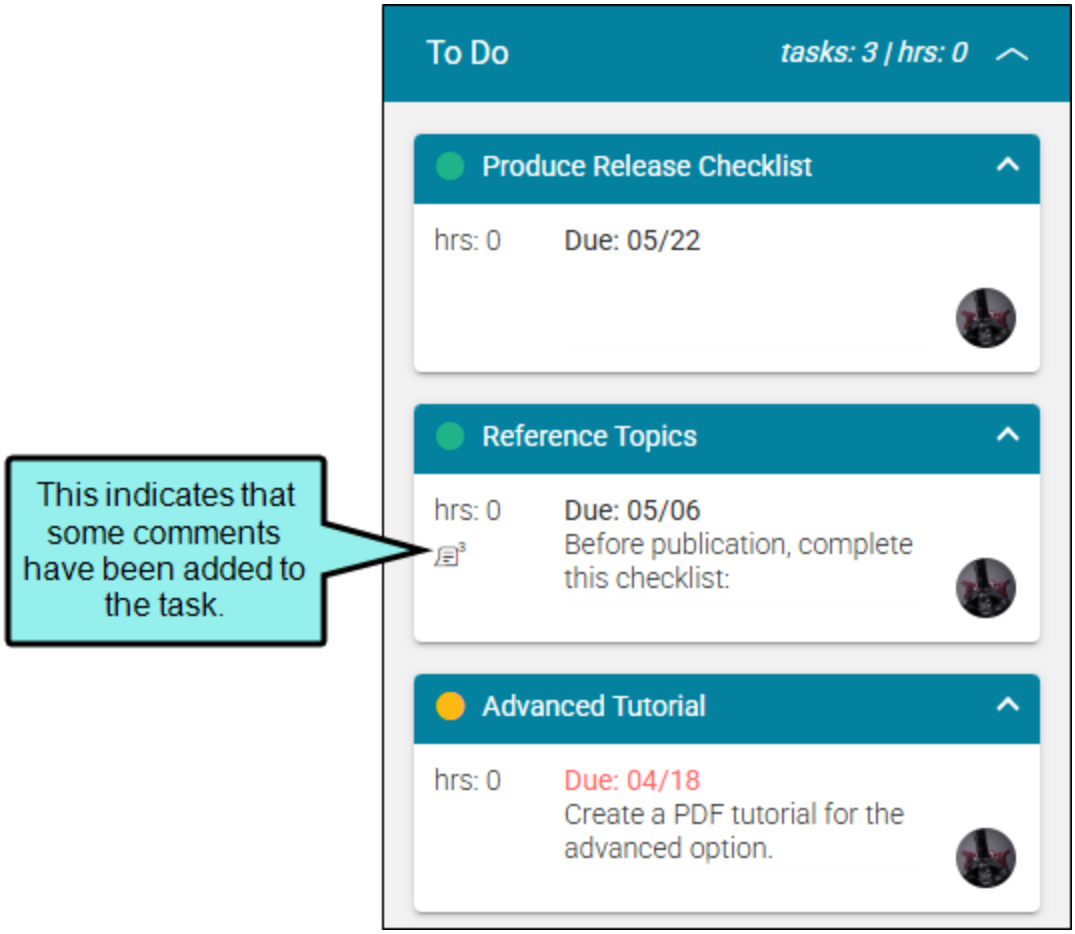
1. On the left side of the interface, click **Tasks**.
2. In the **Boards** grid, click the name of the task board holding the task.
3. Select any of the views at the top (the board, Grid, Calendar, Backlog, Archive).
4. Click the name of the task.



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:

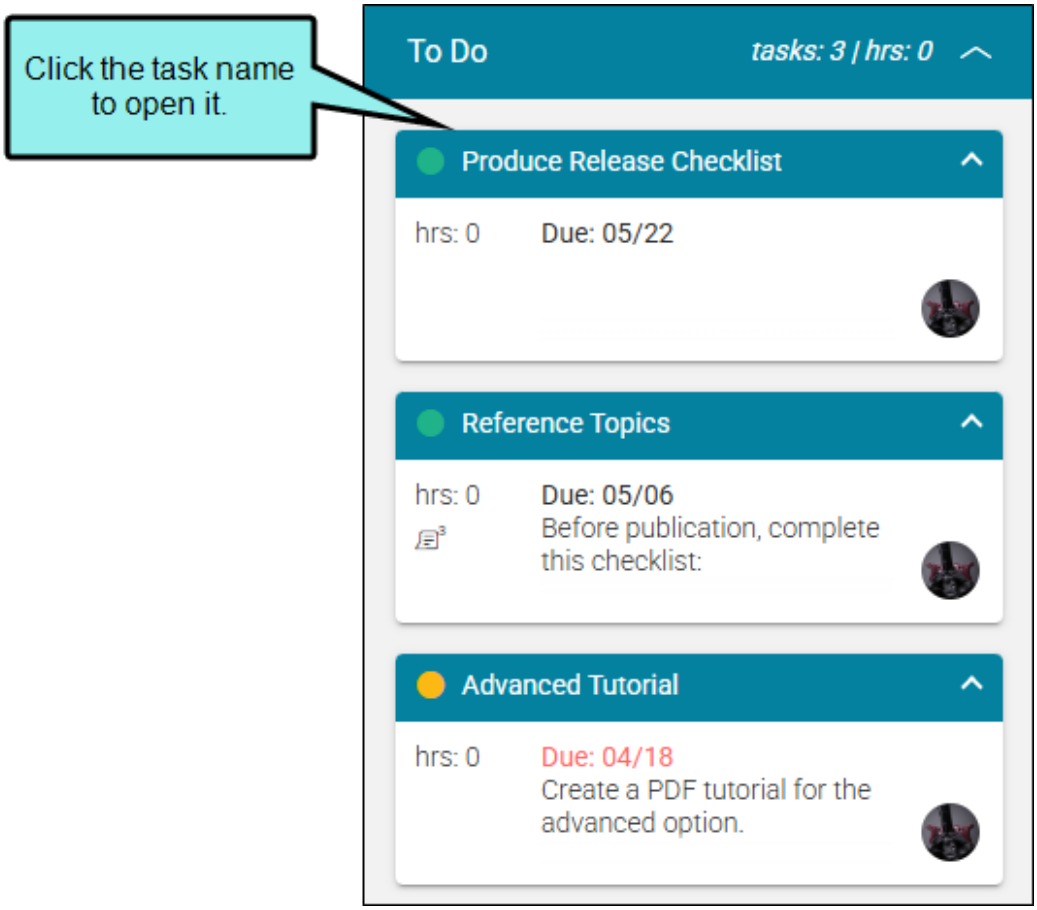
☑ Create/Edit Tasks

Without permission, you can only view tasks.

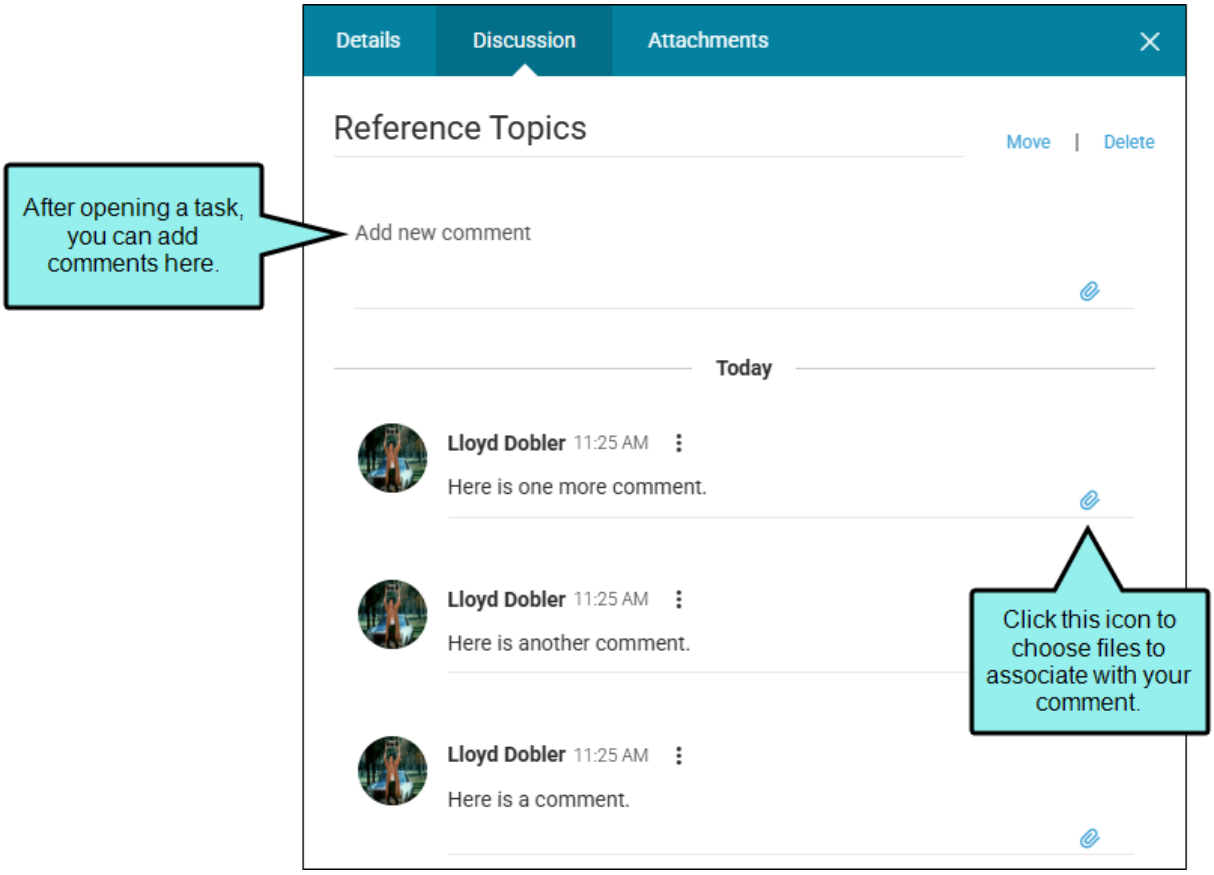
For more information about permissions, see the Help system.

How to Add a Comment to a Task

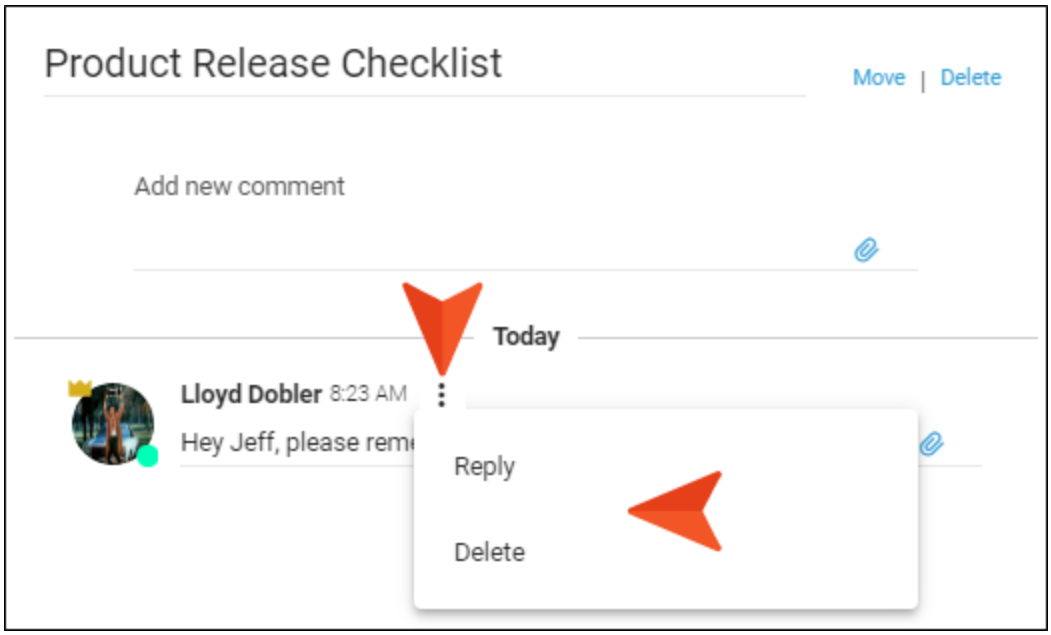
1. On the left side of the interface, click **Tasks**.
2. In the **Boards** grid, click the name of the task board holding the task.
3. Locate the task card and click its name.



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.

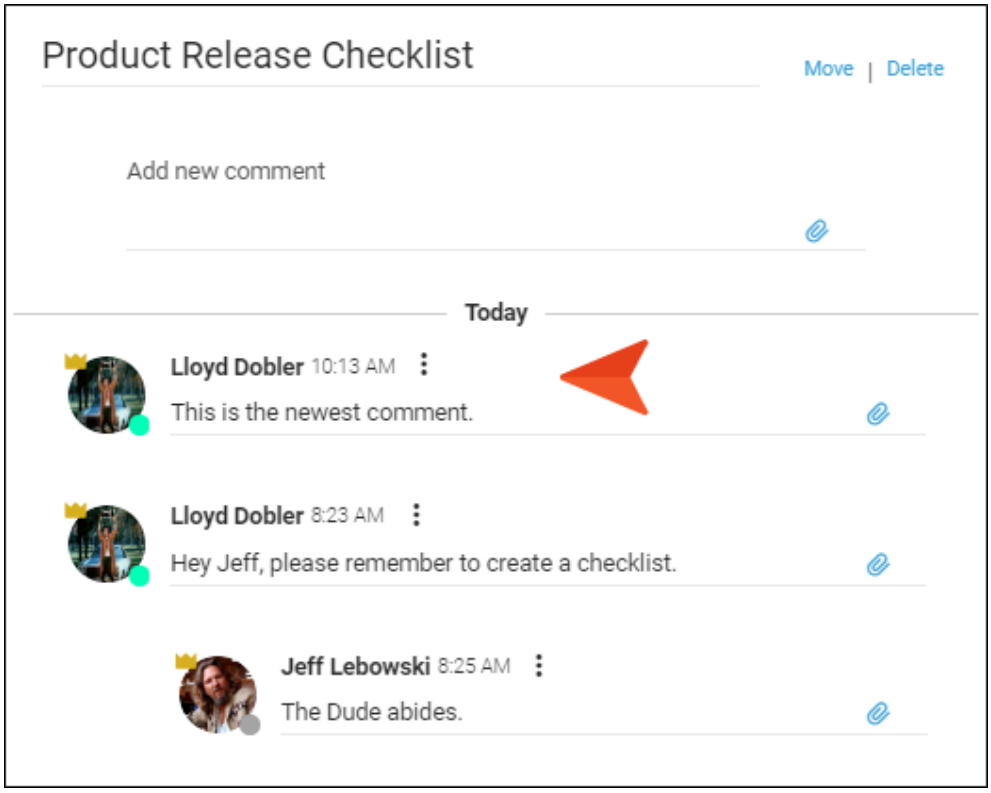


If you want to reply to or delete a specific comment, click the ellipsis button next to it and make your selection.



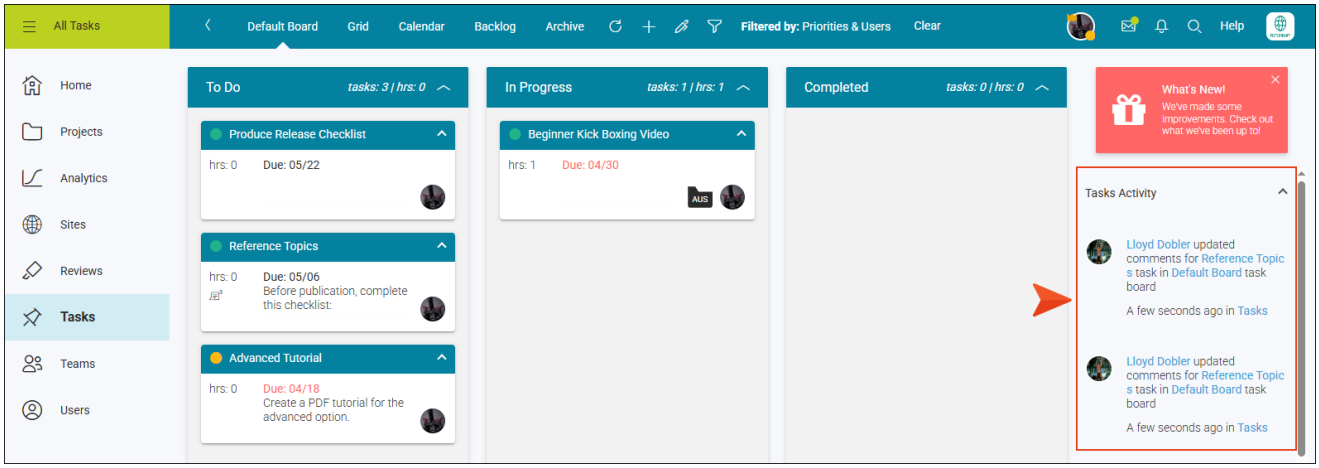
6. Click **Save**.

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

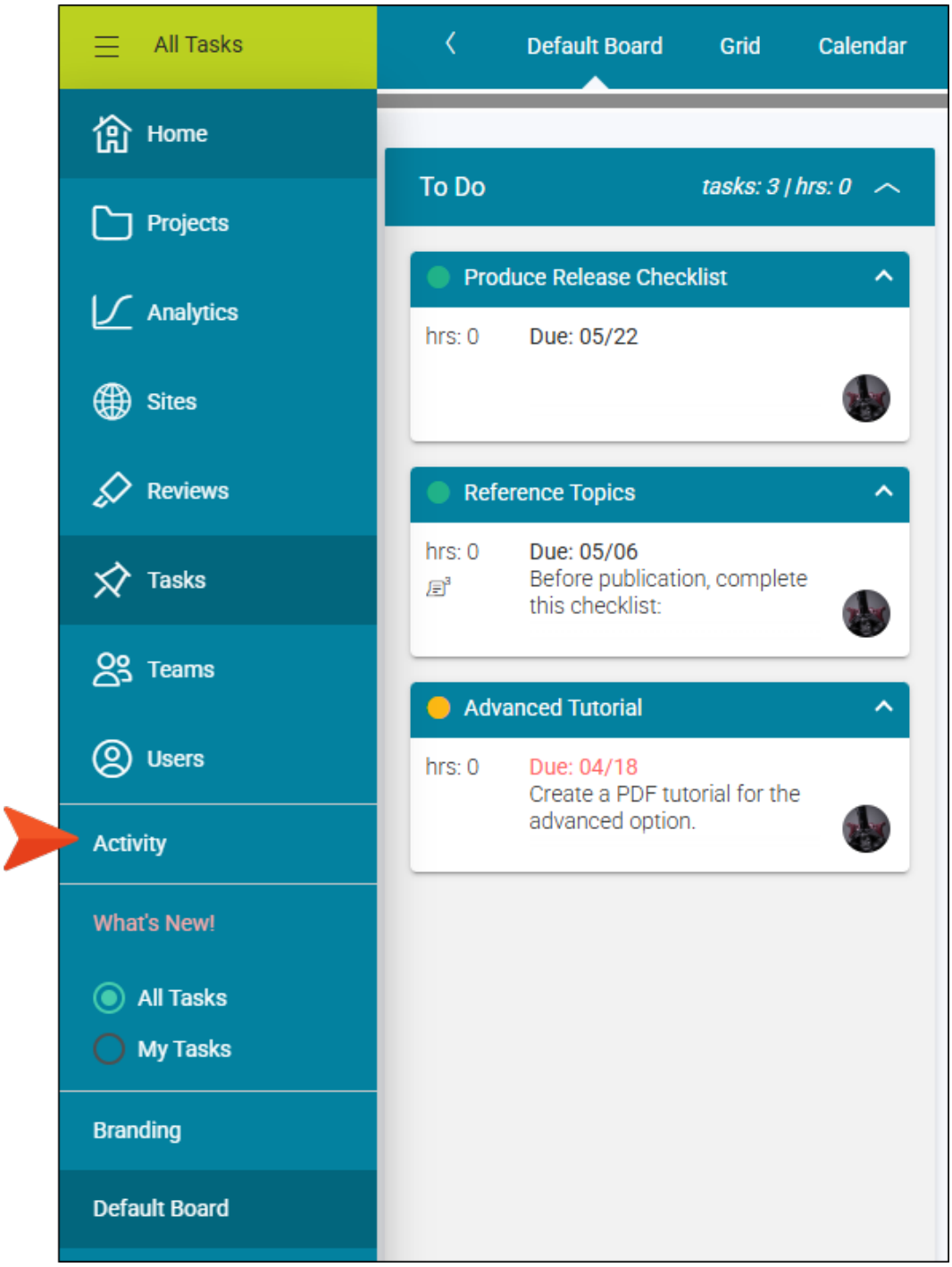


Viewing Task Activity

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.

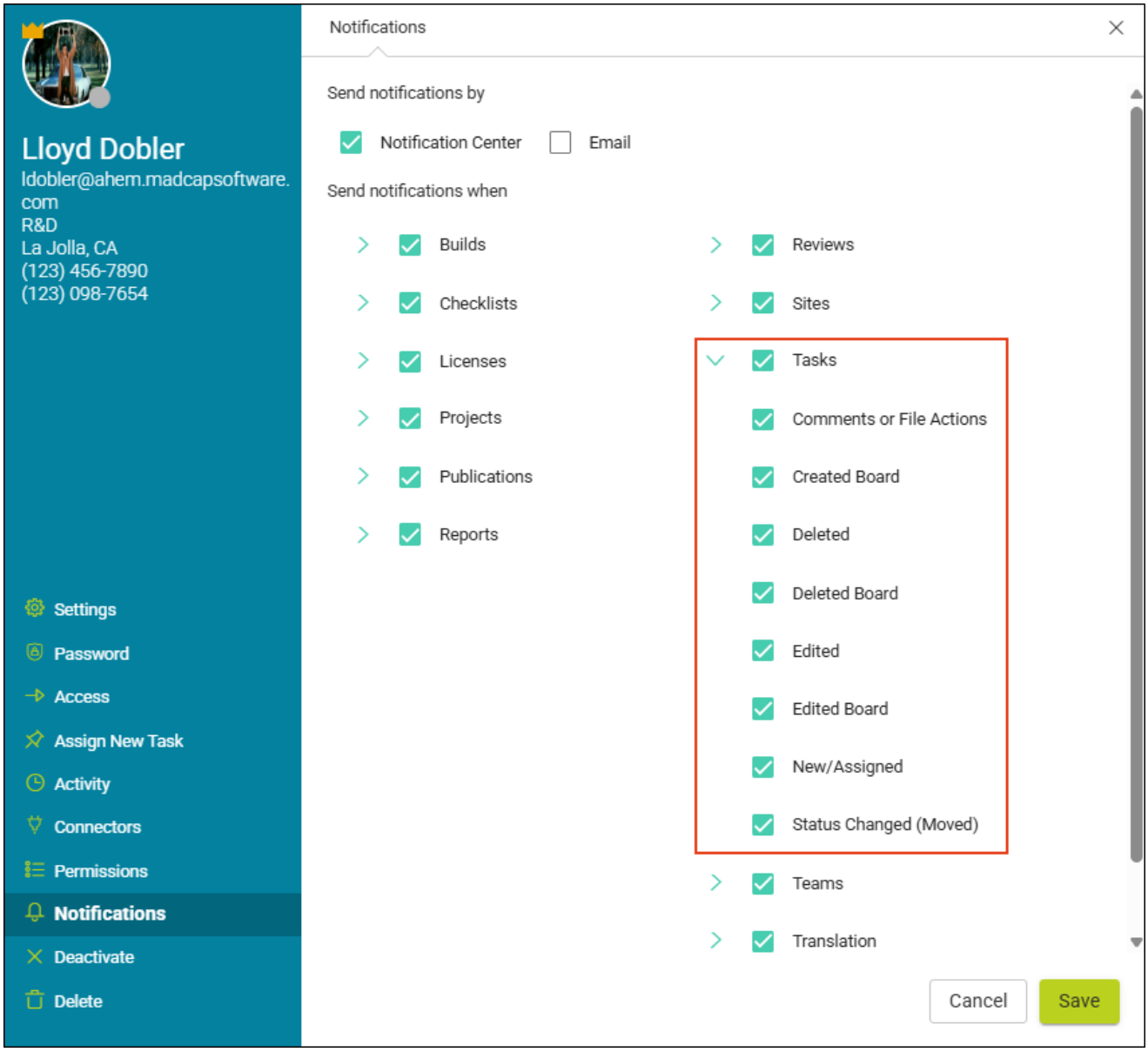


If you are viewing Flare Online on a smaller screen or at a low resolution, the task activity can be accessed from the flyout menu on the left.



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.



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.

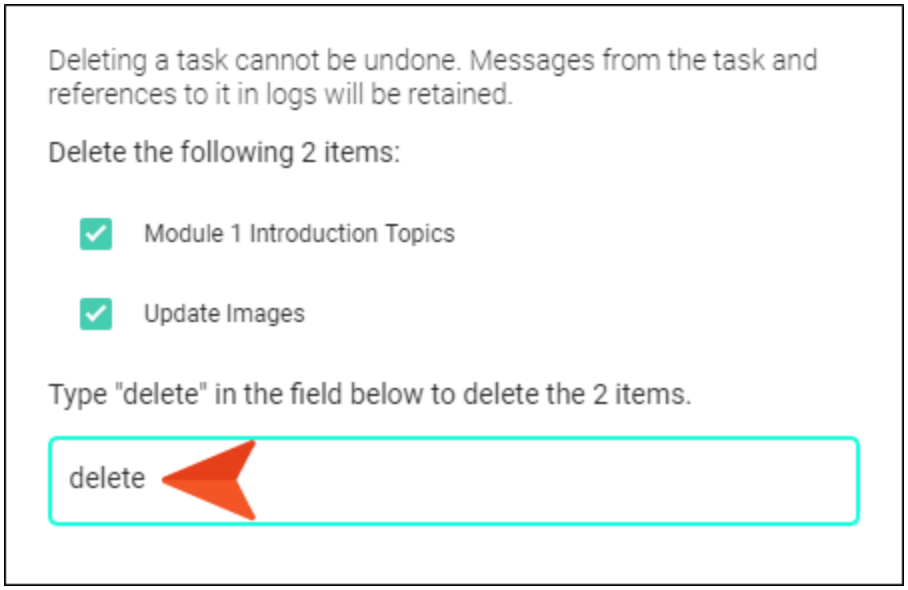
For more information about permissions, see the Help system.

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?

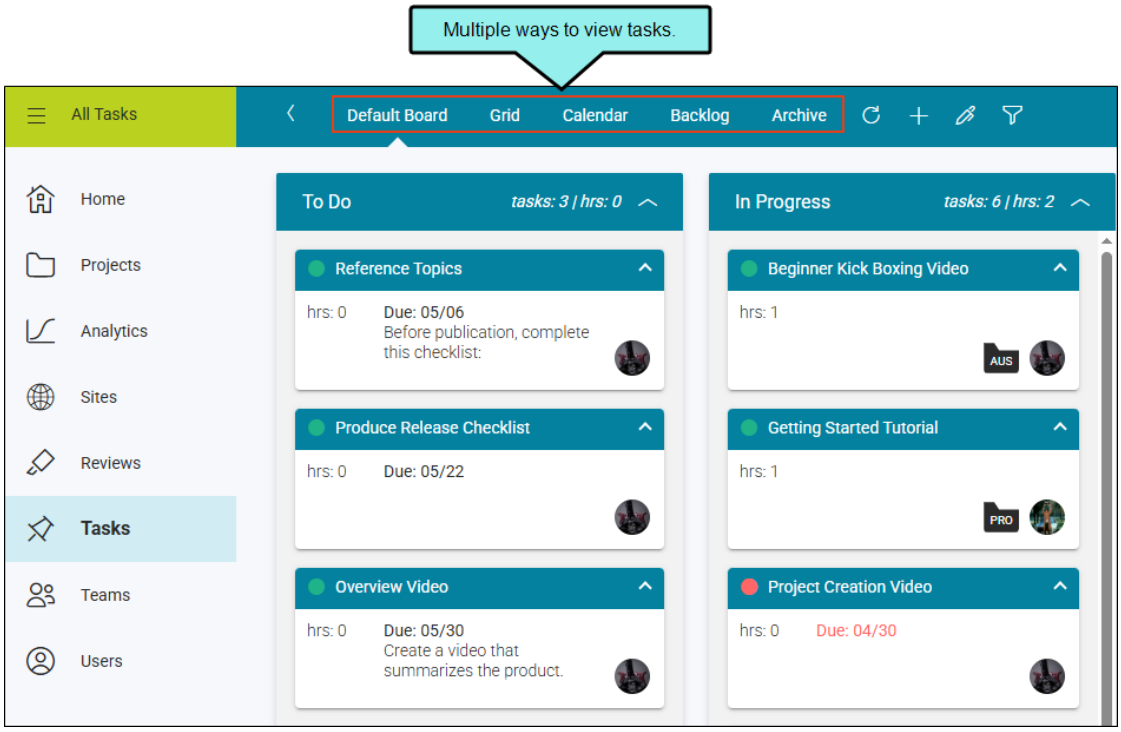
NOTE Deleting a task also removes attachments associated with the task, thus freeing space on the license.

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.

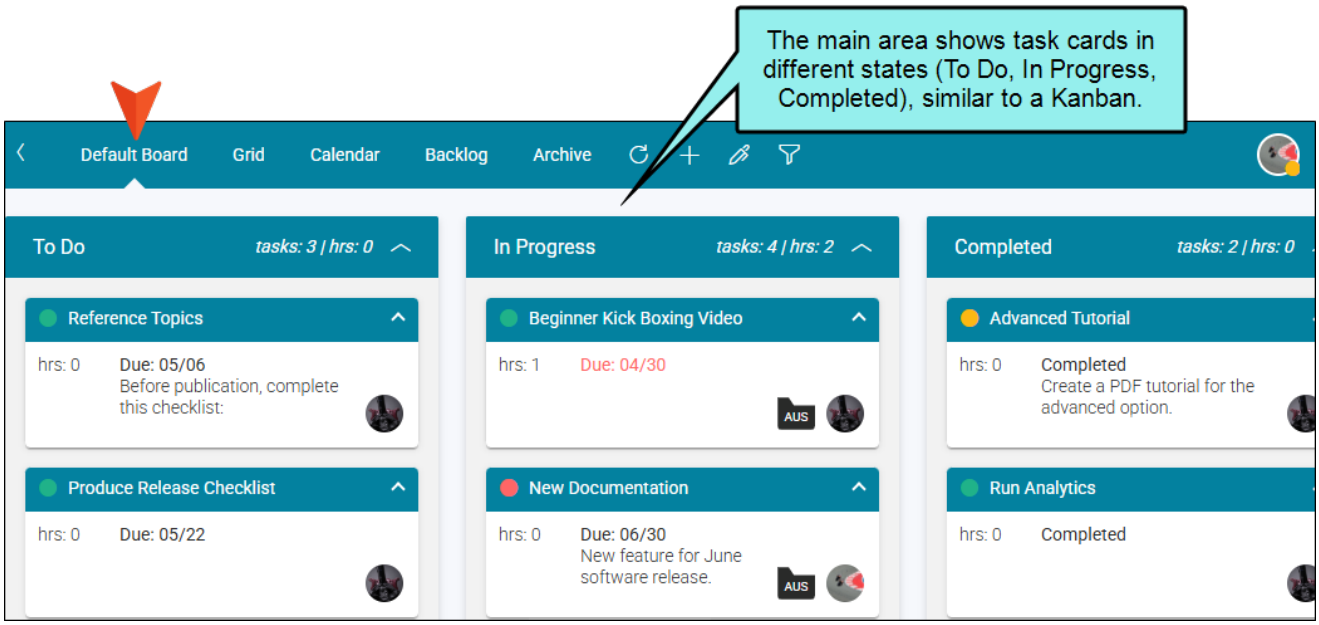


This chapter discusses the following:

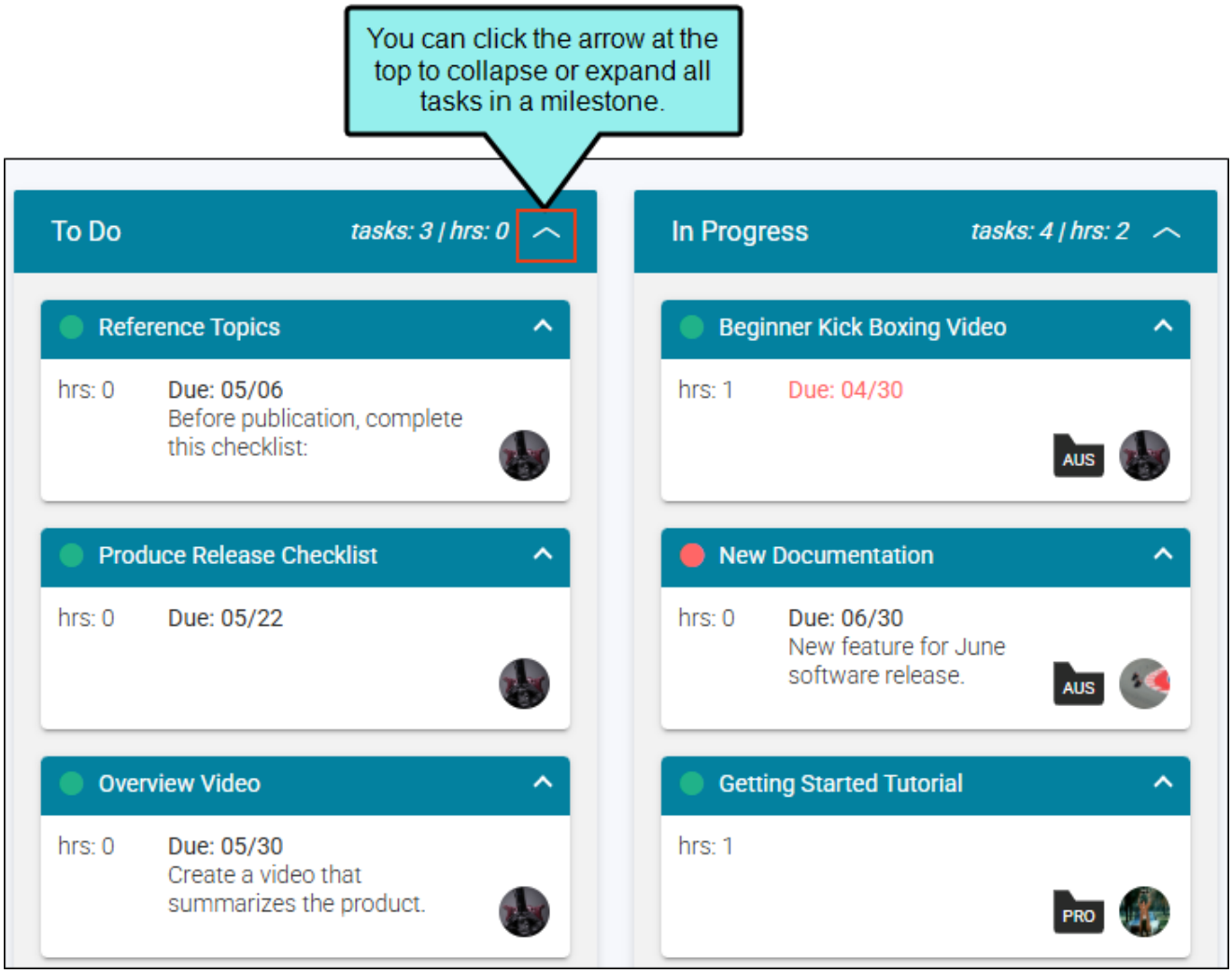
Board View 68
Grid View 74
Calendar View 75
Backlog View 78
Archive View 79

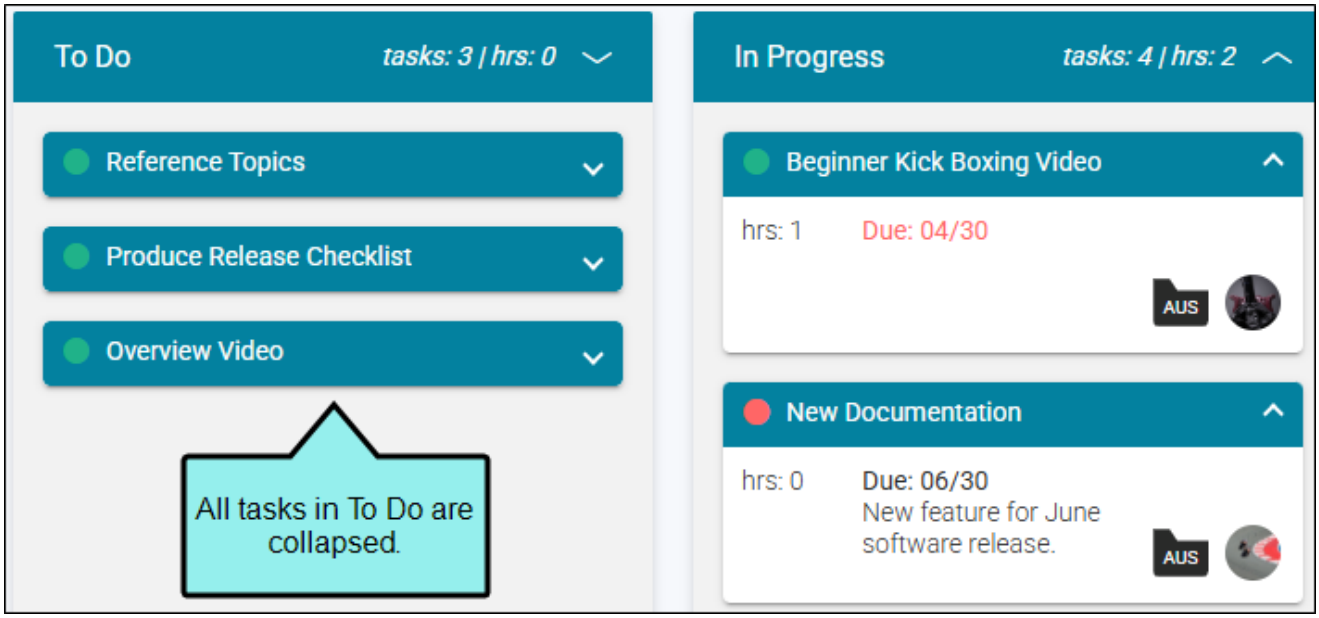
Board View

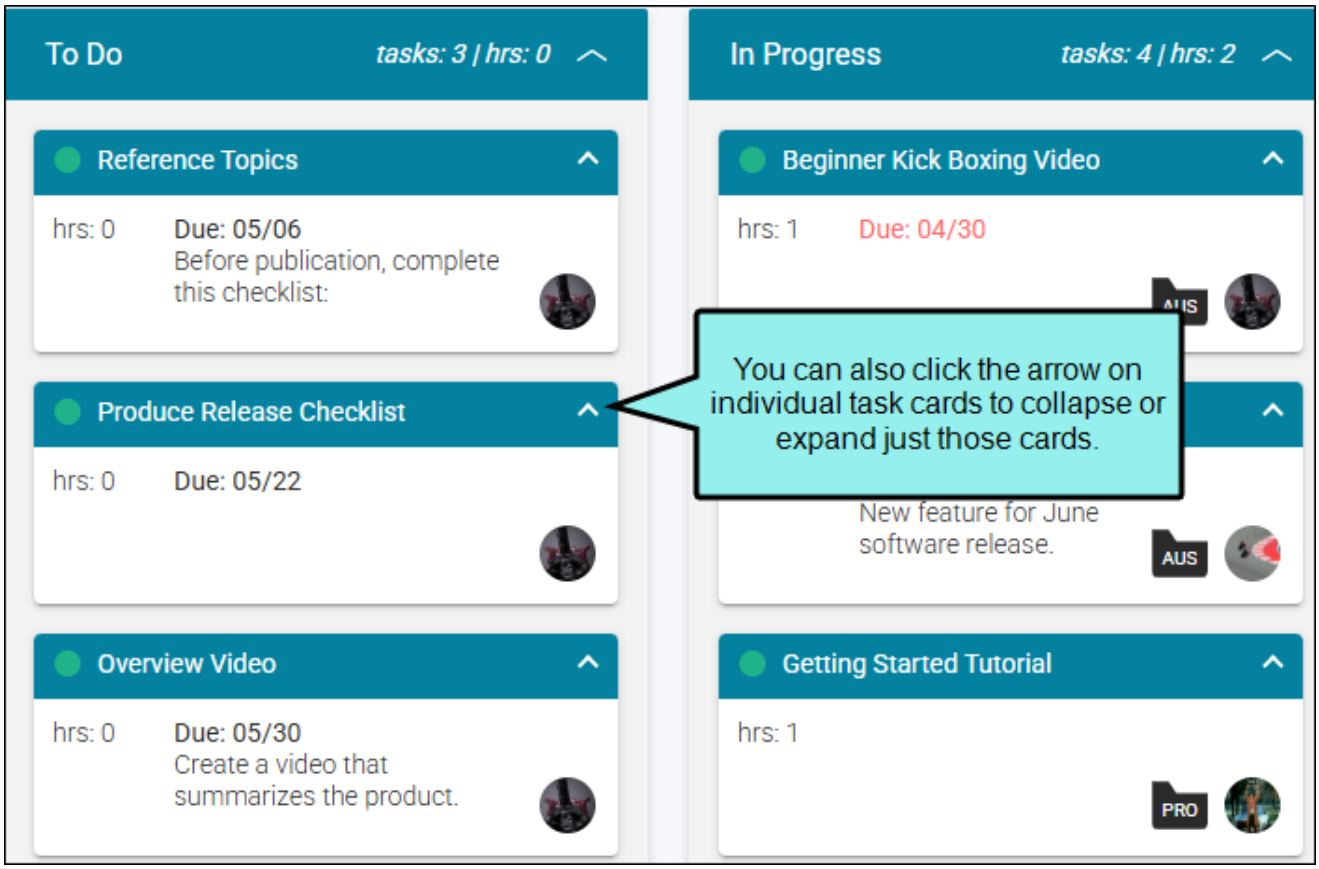
The task board view is similar to a Kanban board. It consists of three preset milestones: To Do, In Progress, and Completed. You can move tasks from one milestone to another as work progresses. Anyone can open a task and add a comment to it. This lets you maintain conversations with others related to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

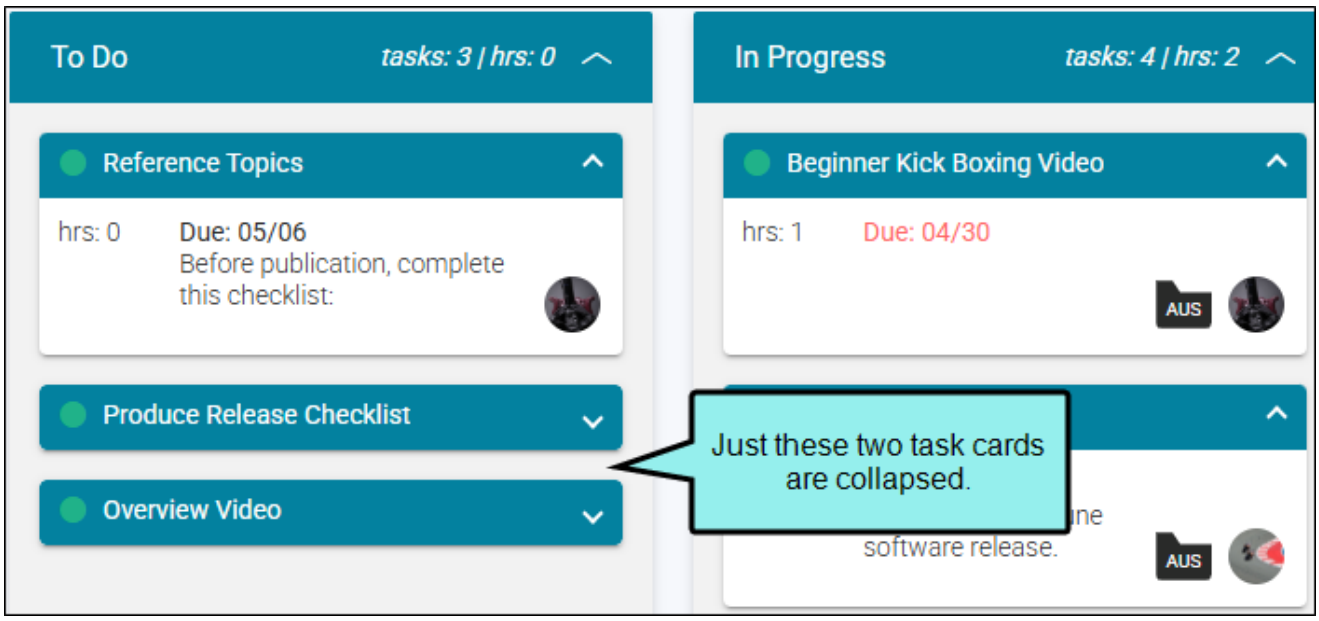


You can collapse and expand any or all cards. This lets you view more task cards on the screen.

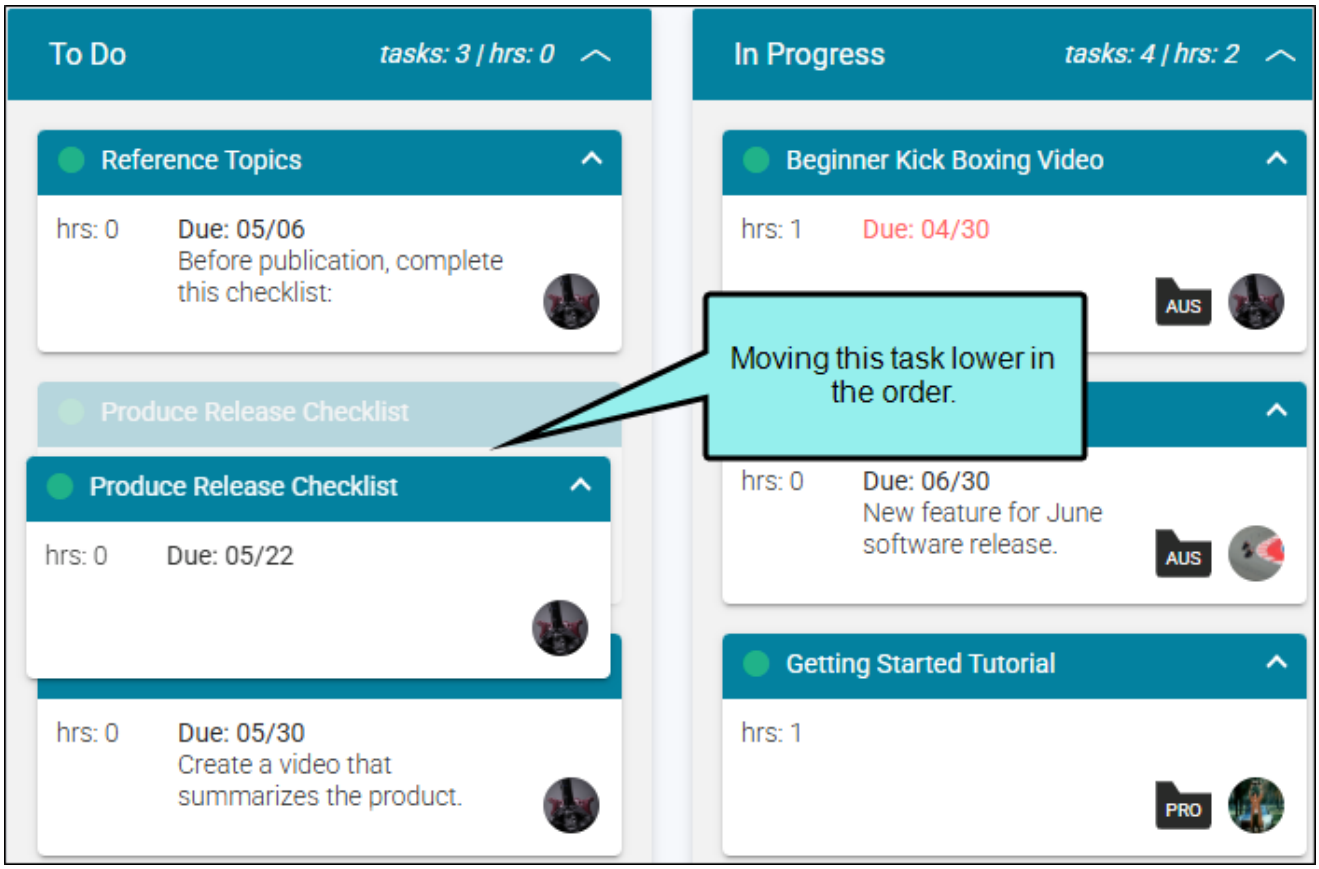


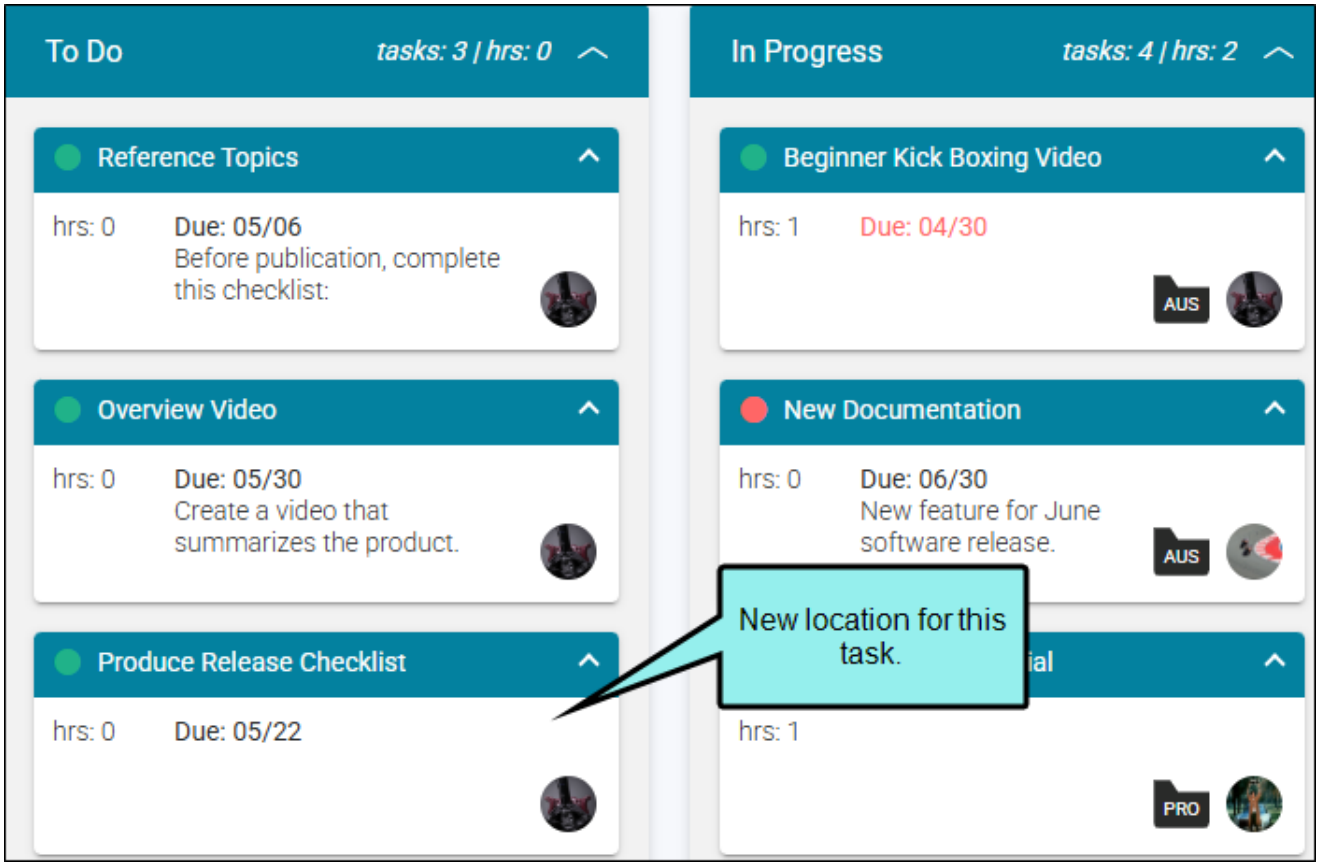

To Do
tasks: 3 | hrs: 0
Reference Topics
Produce Release Checklist
Overview Video
All tasks in To Do are collapsed.
In Progress
tasks: 4 | hrs: 2
Beginner Kick Boxing Video
hrs: 1
Due: 04/30
AUS
New Documentation
hrs: 0
Due: 06/30
New feature for June software release.
AUS


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
New feature for June software release.
AUS
Getting Started Tutorial
hrs: 1
PRO


To Do
tasks: 3 | hrs: 0
Reference Topics
hrs: 0
Due: 05/06
Before publication, complete this checklist:
Produce Release Checklist
Overview Video
In Progress
tasks: 4 | hrs: 2
Beginner Kick Boxing Video
hrs: 1
Due: 04/30
AUS
software release.
AUS
Just these two task cards are collapsed.

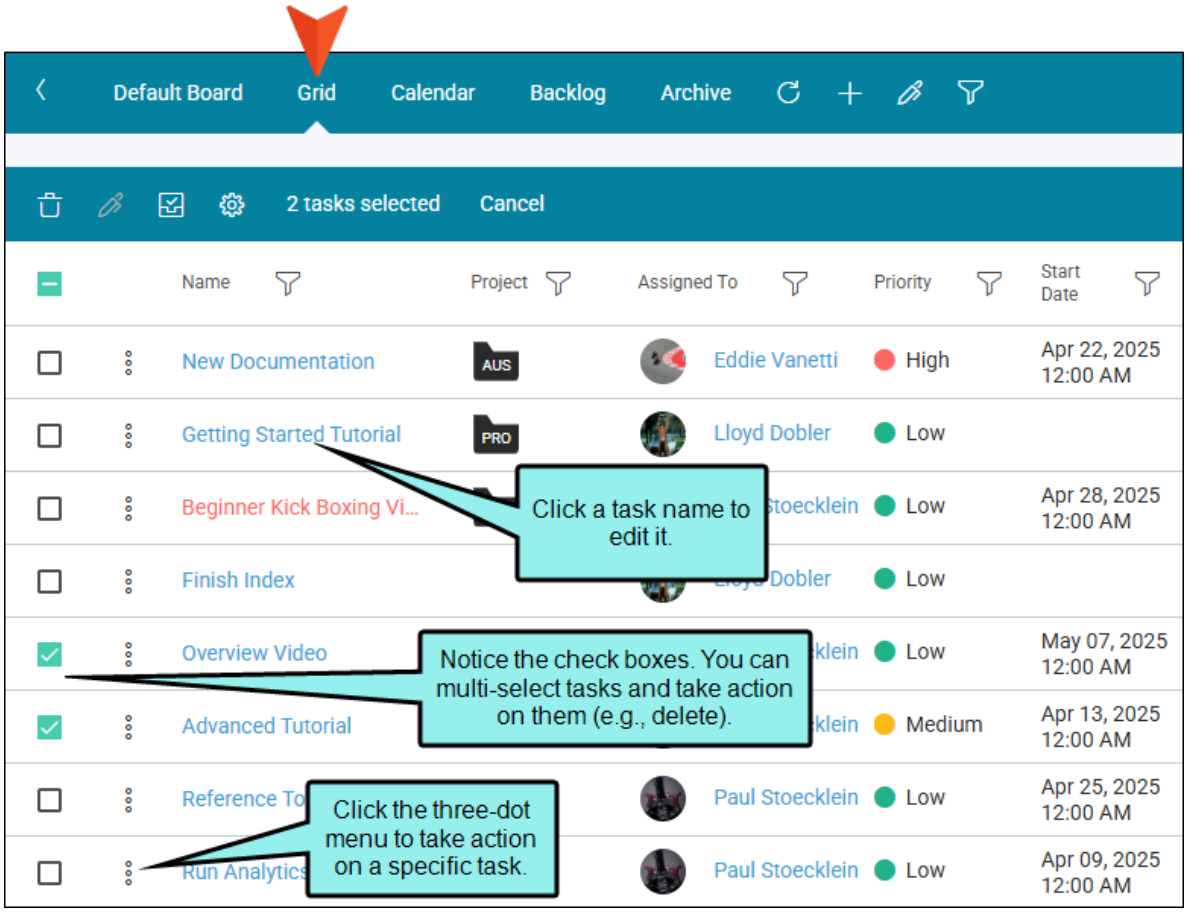
Also, you can customize the order of the tasks within a milestone column by dragging and dropping the cards.




To Do
tasks: 3 / hrs: 0
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
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
New location for this task.
hrs: 1
PRO

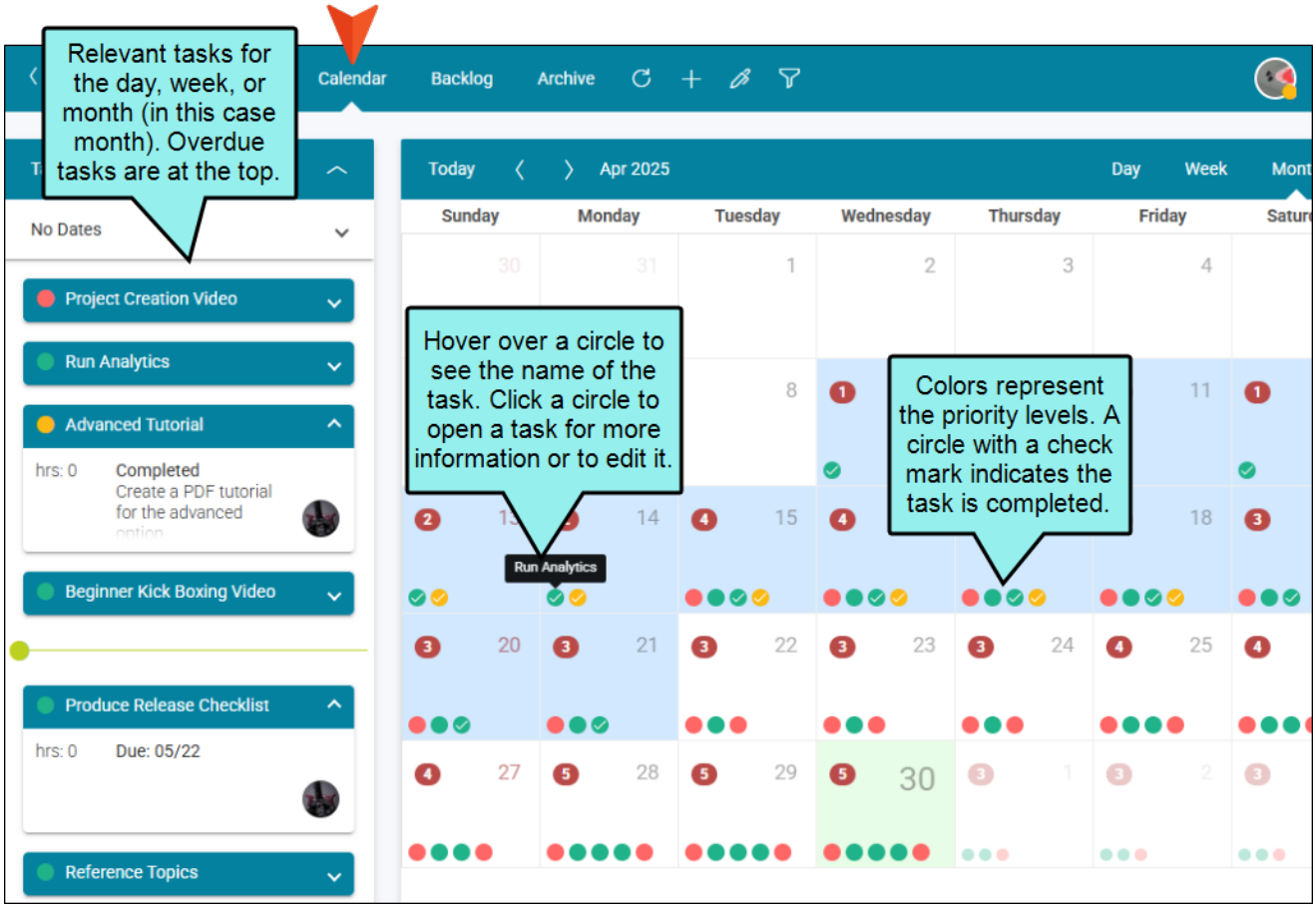
Grid View

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.



Calendar View

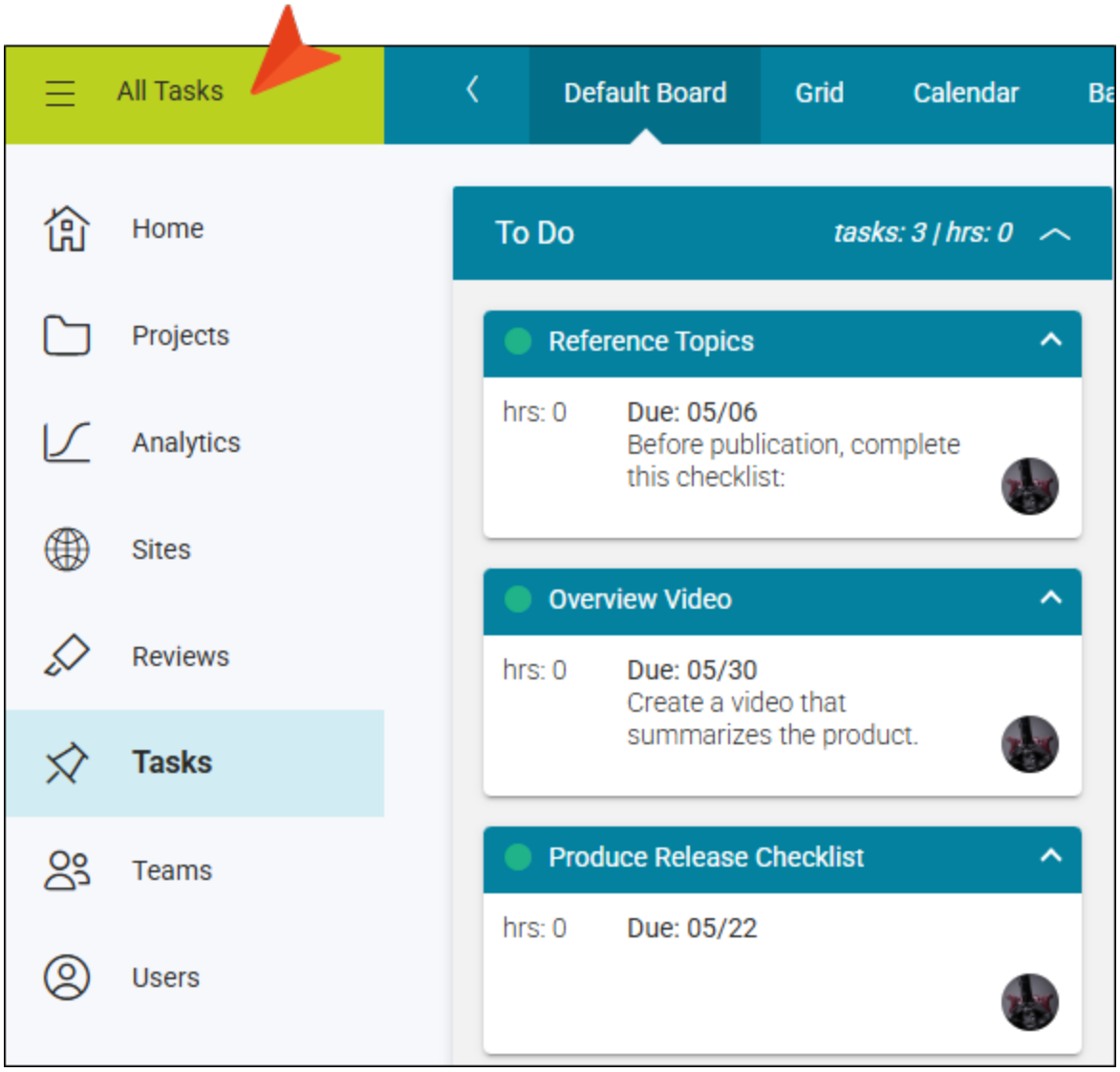
The Calendar view displays tasks in a calendar format for the day, week, and month, with task cards listed to the left. Tasks in all milestones—including the Backlog and Archive—are included. However, only tasks that contain dates are displayed in the Calendar view. Small, color-coded circles represent 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.



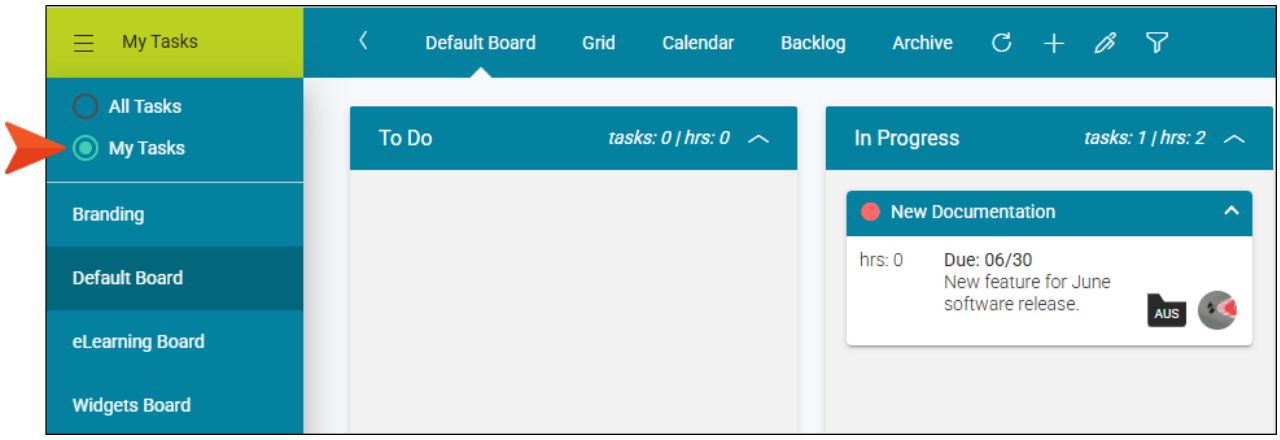
Since the Calendar view can get cluttered if you have a lot of users and many colored circles representing tasks for all them, this is a good place to use a filter. For example, you can switch between All Tasks (showing tasks for all users) and My Tasks (showing only tasks assigned to you). This and 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.



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**.

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.

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 Guide

Links Guide

Projects Guide

Reports Guide

Reviews Guide

Security Whitepaper

Sites Guide

Snippets Guide

Source Control Guide

Styles Guide

Targets Guide

Tasks Guide

TOC Guide

Topics Guide

Translation Guide

Users and Teams Guide

Variables Guide

What's New Guide

Widgets Guide