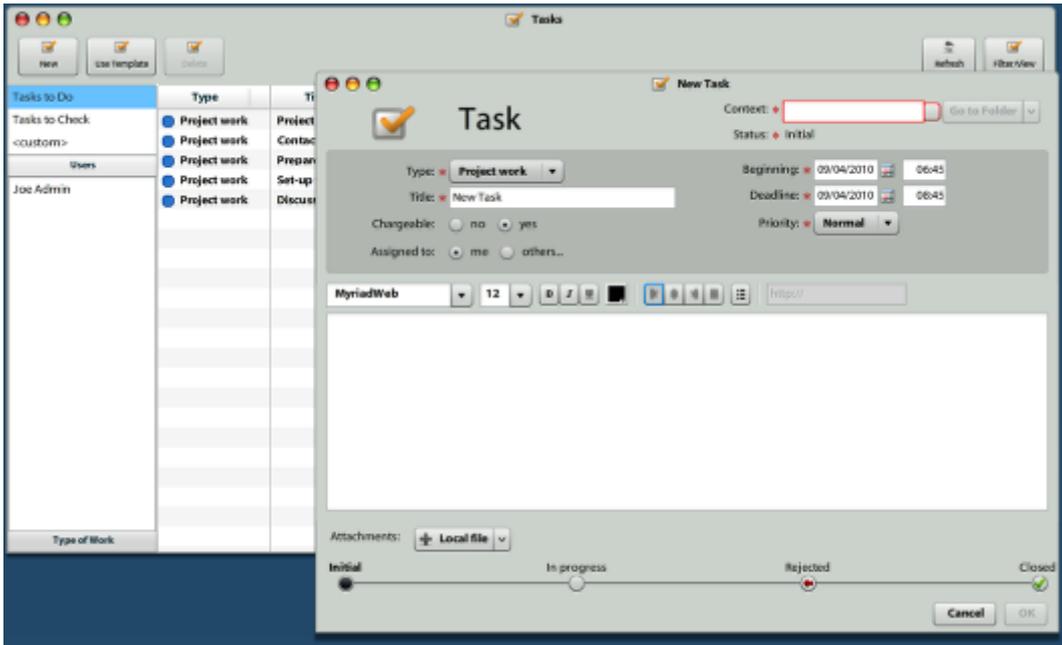


Create & Assign Task

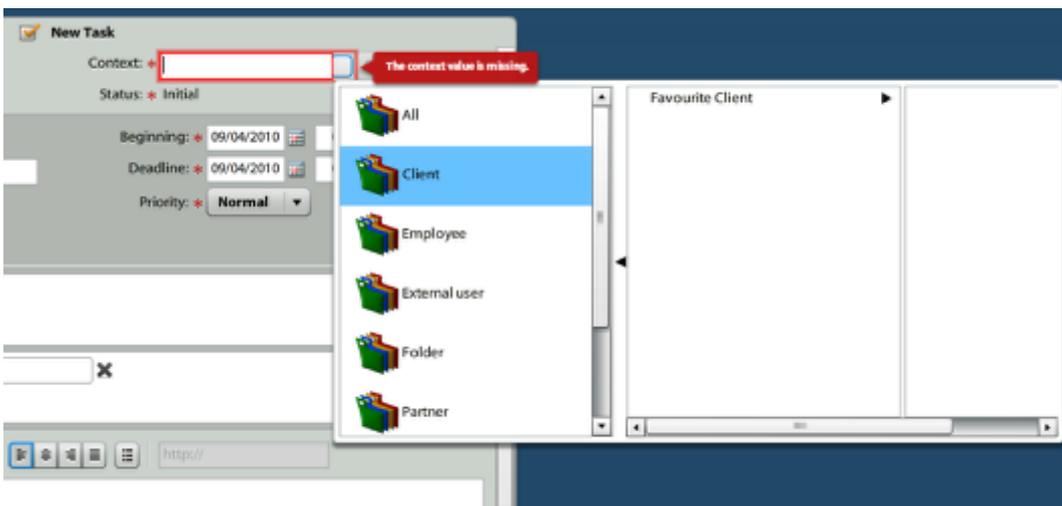
This tutorial shows you how to create new task, assign it to solver & show the solver how to accept or reject the task.

Open Tasks Application



First go to **Atollon** Applications menu & open **Tasks**. Optionally, only move mouse over Tasks icon in toolbar & select **New Task**.

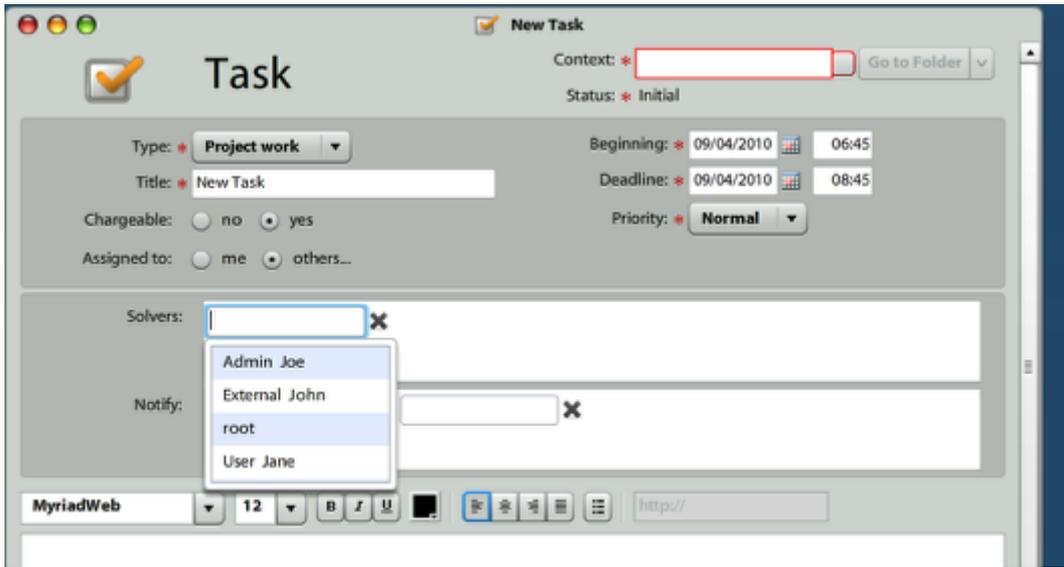
Create New Task



On tasks overview, click on **"New"** button, the **"New Task"** form will open. Select the **Type** of work, write Task **Title**, indicate Task **Beginning** & **Deadline**, set **Priority** & **Chargeability** of the task.

You can also attach **Local file** (from local file system) or **Document** (from Atollon). Once the Task is sent, the file is uploaded to Atollon on selected folder / project automatically.

Assign Task to someone else

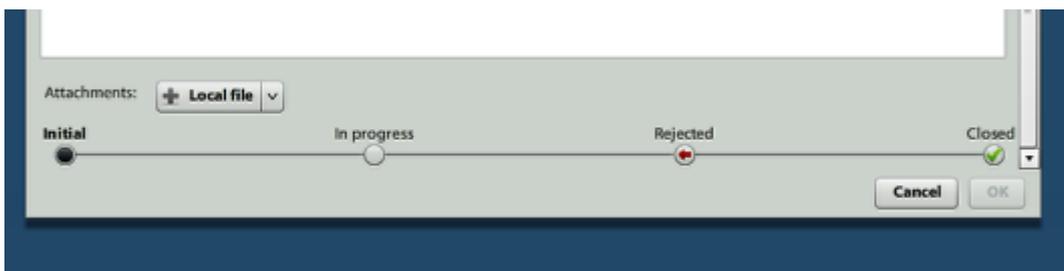


Click on **Assigned to: others...** to select whom you would like to assign the Task in **Solvers** section. Simply start writing user's name to search for desired Solver.

In **Notify:** field you may select users, which will get notification about the Task. For instance, once the Task is not closed within the **Deadline**, the Notify user gets information in his/her Inbox.

After assigning Solver to Task, the user gets notification about new Task. Notifications may be adjusted to organization needs in message templates.

Select Task Context



Task may be stored at **Folder**, **Project** or **Activity** levels. For project management purpose it is necessary to select task's Project.

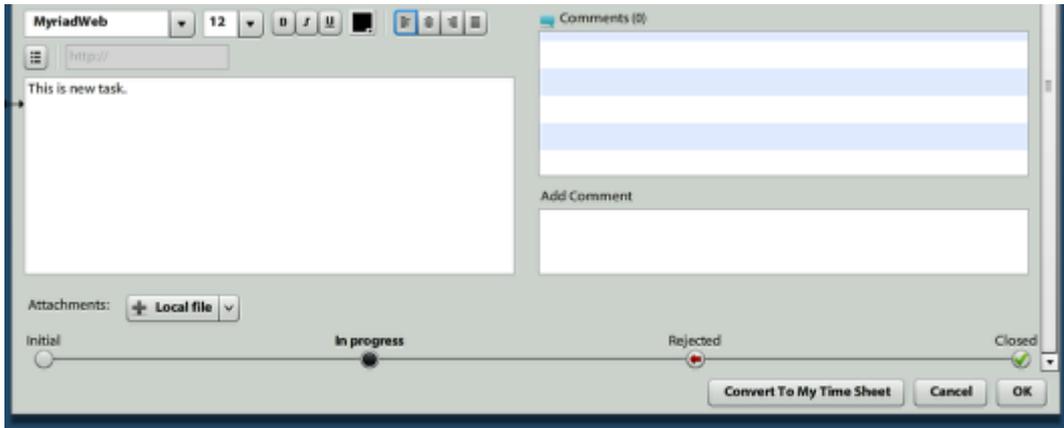
Simply start typing Contact / Simple Folder name to search for folder & then select Project (just double-click on selected item).

Send Task

S.	St...	Type	Subject	A...	From	For	Date
☆	📎	Task	New Task		Admin Joe		Today 7:10 AM

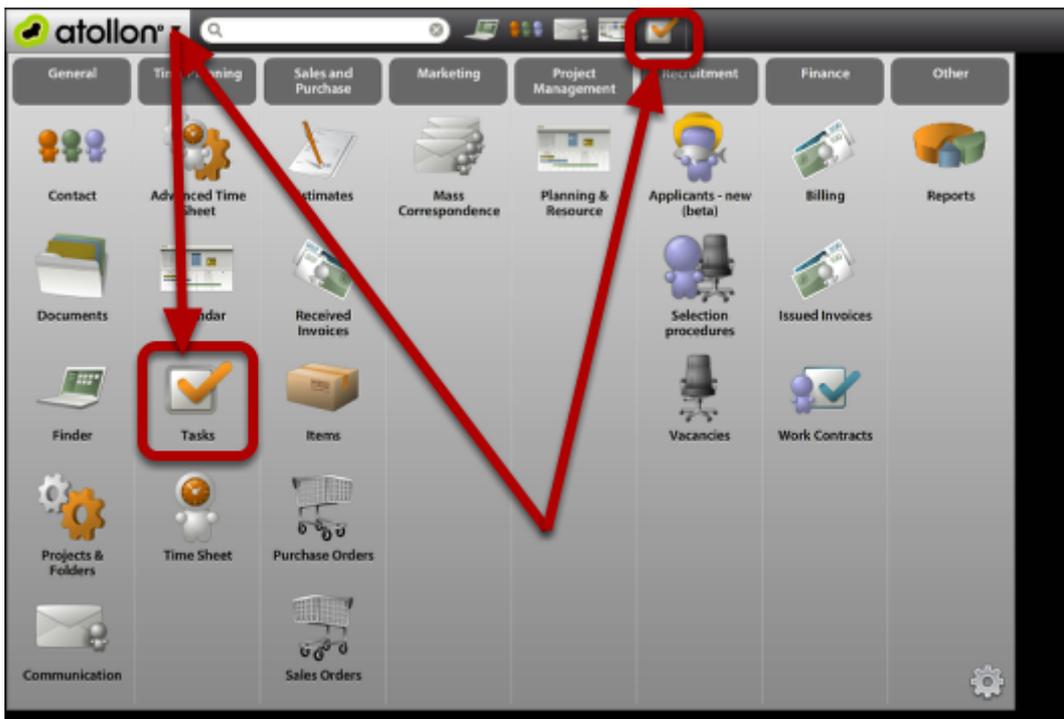
Add Task description, if needed and click on **Ok** to send the task. Ok button is greyed once required fields are missing. Please fill-in required fields to enable saving the task.

New Task Received



The task **Solver** gets notification to Communication **To Do** about new task.

Accept/Reject Task



Accept Task

Once you opened task, indicate you are going to work on the task or reject the task with some reason. Click on **In progress** (or similar) task status & press **Ok**.

Reject Task

Add Comment always when rejecting task. Click on **Rejected** task status & press **Ok**. The task **Solver** will be changed to user, who assigned the task.

Rights

Creating task

User can create task to and assign it to himself/other user, if user has right NEW on his own/other user's task acl.

Update Task

Task can be rejected by solver in any case.

Task can be changed by user, only if user has right on head user of edited task.

Revision #1

Created 16 March 2020 16:50:38 by Jan Safka

Updated 16 March 2020 17:11:02 by Jan Safka