Task-Base

web based collaboration

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Introduction

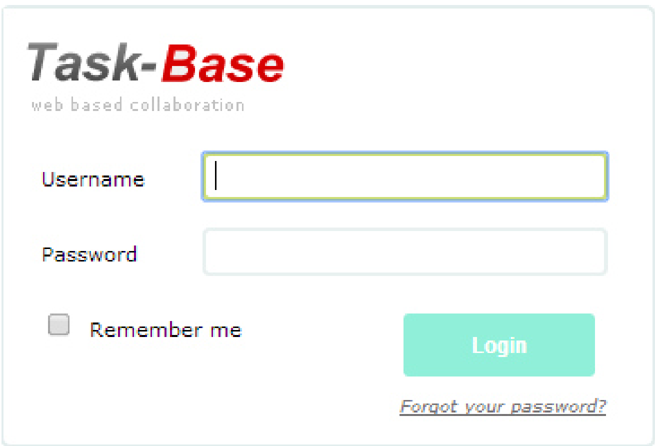
Program start

To start Task-Base, select your Internet browser (MS Internet Explorer 9.0 or higher) and enter the Task-Base URL. Enter your User Name and Password in the login form and click Login.

To save your user name and password, check the box Remember me. If you have forgotten your password, enter your user name, click on Forgot password, then enter your email and click Send Email.

You will receive your password via email.

To delete a saved password, start Task-Base normally, click the pull-down menu under your name at top right, and then Log out.



Tip:

You can create an icon for Task-Base on your desktop by following these steps:

- Right click on the screen

- New, Shortcut

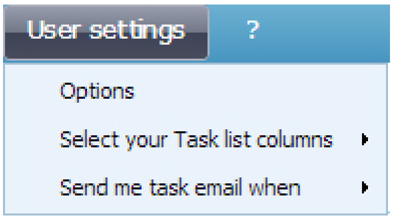
- Enter your Task-Base-URL (which you use to start Task-Base normally) → Continue

- Enter a name, for example "Task-Base," – done.

If you have saved your password (clicked the Remember me checkbox), you can start your Task-Base quickly.

Personal settings

When you begin to work with Task-Base, first define your User settings (top menu bar, left side). Options allows you to configure the following settings for your application:



Options

- Change Language and Password

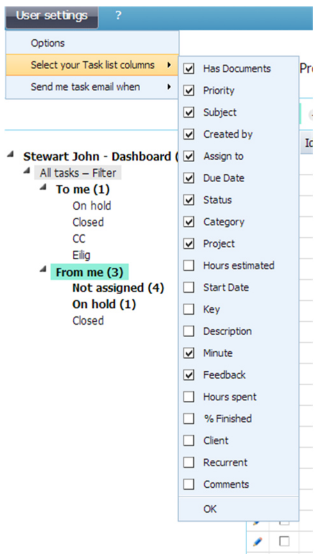
- (select) Folder at program start

- Permission for other users to access your account

When you give access to your Task-Base Account to one, or more users, they get the right to see your account and to work on your behalf with it. Respectively, you deprive him/them of this right

Select your Task list columns

You can always select the columns you want to display in your task grids. Check each column in the list that you want to see and click OK. The change will take effect immediately. You can change order of the columns by clicking on the column and pressing the left mouse button to drag and move.



Send me task email when

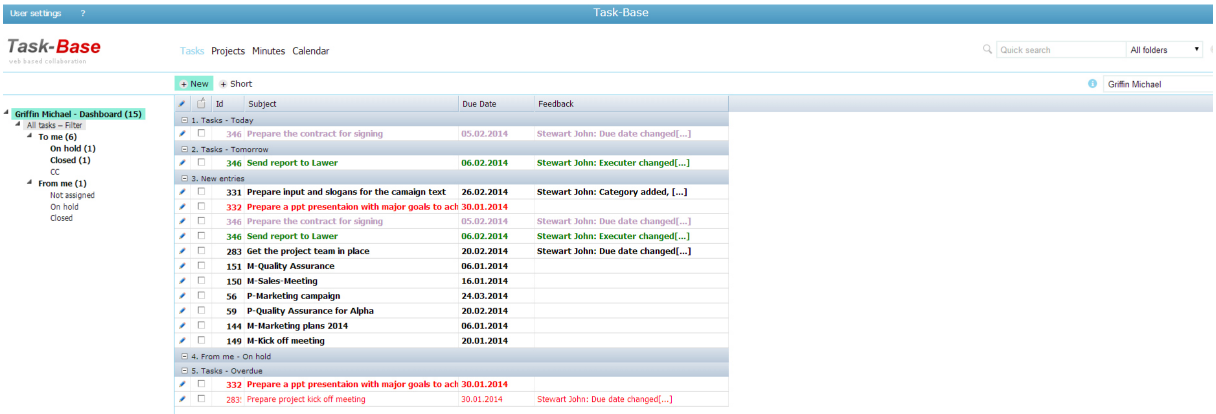
Check cases, in which you want to be notified by email, then click O.K. Changes will take effect immediately

Task Manager

Dashboard

The Dashboard gives you an overview of what is new and what is important. It helps you to set your priorities.

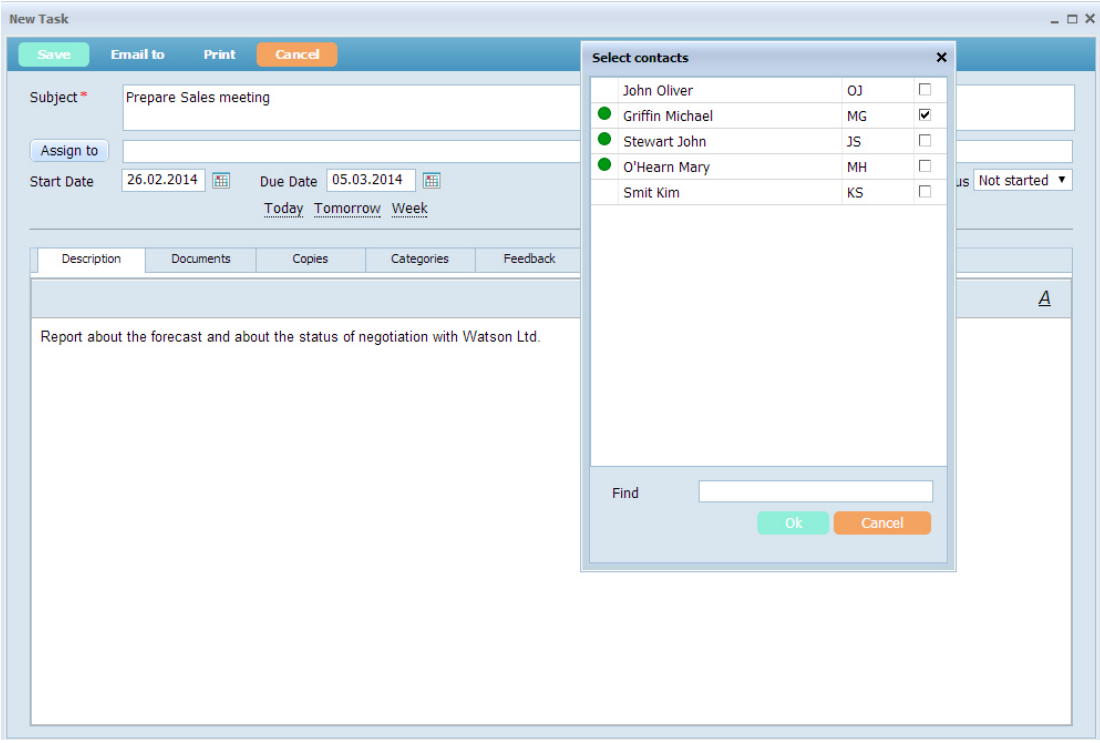
You can see at a glance all tasks that are due today or tomorrow, everything "Unread" (new or changed tasks, minutes, and projects), all tasks with "On hold" statuses, and all overdue tasks (red).



Create Task

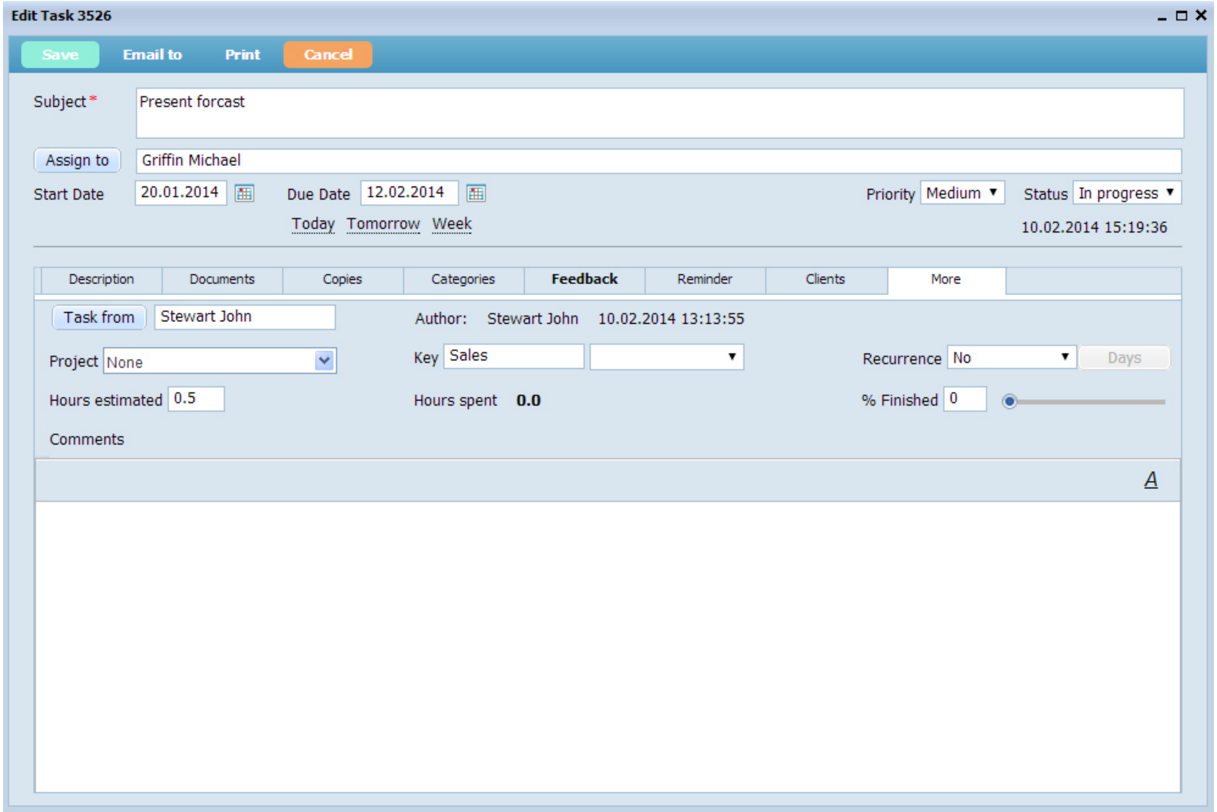
- To assign a task, click + New on the top menu bar to retrieve the task dialog. The subject field is the only mandatory field in the task mask. Tasks without recipients will be stored in the subfolder Not assigned and can be assigned to someone later on.

- Click Assign to and select from the list of people to whom you are allowed to give tasks. It is also possible to enter the name or initials of the receiver directly into the field.



- Under Subject, enter a brief title of the task. This field appears in the task list.
- Enter the Due Date.
- To set a Priority, you can select between "Low," "Medium," and "High."
- Under Description, you can write more details or paste them. To use the editor, click on A.
- Under Documents, you can upload any kinds of documents or enter and save path /URL. In the field Description, you may add some description of the document. If you check the box in front of Intern, this document will not be visible to any customer.
- In each task, you can send Copies to various people. Copies will be displayed in the user's folder "To me", sub folder "CC."
- Adding Categories to your tasks will make it easier to find a bundle of tasks that belong together in the search function. It will also help you to select tasks to create reports. Categories are defined and maintained by the "Administrator" of an organization or an "Authorized User."
- When you click + Reminder, you get a dialog to add a reminder. Enter when and about what you want to be reminded. Optionally, you can click Remind to remind other people involved in this task. Reminders will be sent by email.

- You can assign a Client to each task, which can also be a search criterion.
- Under the tab More, you will find a number of additional functions:



- In general, the task author is the creator, who will create a task and follow up on its progress. In some cases, the author will create a task on behalf of another user (such as a secretary on behalf of a boss). In this case, users have to select the task creator under Task from. The selected user will see the task in his/her “From me” folder. The author will see it in his/her “CC” subfolders.
-
- Key is a free field in which you can enter any term, such as team name, internal project number, or account track. It is useful for task filtering.
-
- Recurrence: For recurrent tasks, select a cycle, e.g. monthly. Once the task is completed, it will generate itself with a new date according to the selected cycle. It will not be moved into the subfolder “Completed” until you stop the cycle and make it not recurrent.
-
- Hours estimated: <u>If you use the resource module, you need to enter the estimated hours.</u> It is necessary to correctly show the workload of an employee.
- Hours spent: The task recipient can record the hours he has spent processing the task in a corresponding field in the feedback dialog. All entries are counted together and the sum will be shown in (current) “Hours spent”.

- % Finished: What percentage of a task is already done? Enter your answer directly or hold and move the pointer on the line.
-
- Comments: You can enter additional, optional information in this field.
- Press Save to send the task to the recipients. If the recipient is a Task-Base user, he will see the task in his “To me” folder. If he is an email user, he will receive the task (in addition) as an email in his inbox. You, as a task creator, will see the tasks in your “From me” folder. For you, it makes no difference whether the recipient is a Task-Base user or only a contact/email user.
-
- Email to: You can send this task to the selected recipients via email at any time.

- Print: Tasks can be printed with all of their information.

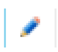
Create task quickly

Go to the “From me” folder, and click in the upper menu + Short. You will get a short dialog to quickly add one or more task(s).

Send task to multiple recipients

You can add a task for several people. Each recipient will see his task in his “To me” folder and can create his feedback about his work. Each recipient can change the task status and all changes will be recorded by the system as a system log.

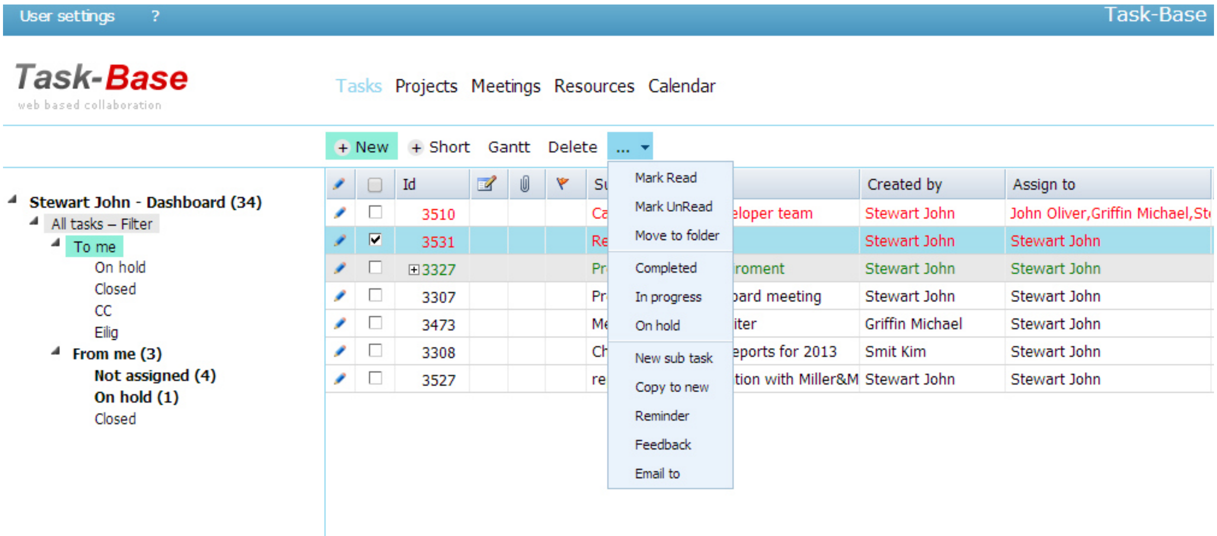
Processing tasks “To Me”

The “To me” folder contains all the tasks assigned to you. A new task appears bold, which means it is unread. Its status is “Not started.” You cannot delete tasks made by other creators. Open the task by clicking on . Once you have read the task, you decide whether or not to accept it.

Accept: Open the task or right-click and change the status to “In progress.”

Reject: Open the task and change its status to "Rejected." You can enter the reason for the rejection in the feedback form. The creator will see the rejected task(s) in red in his subfolder "Not assigned."

The "…" (more) menu gives you more functionality to edit your tasks. Select one or more tasks that you want to edit and click on the menu. If you want to edit only one task, you can get the menu also by right-clicking.

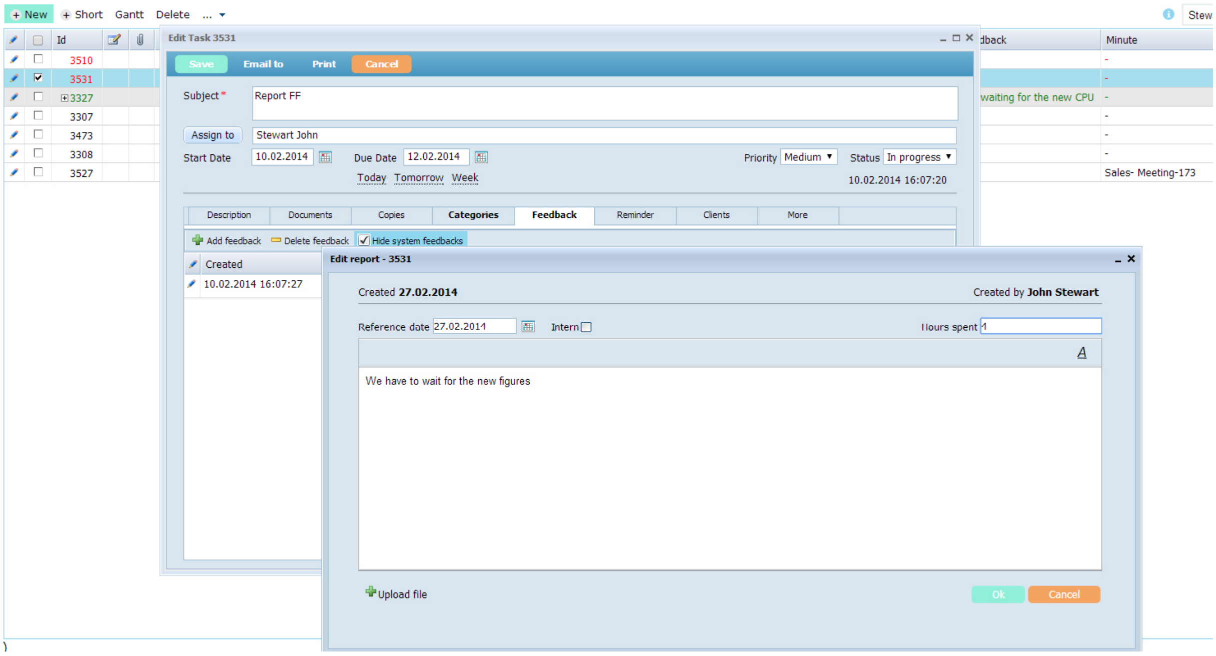


Feedback

With Feedback, the task creator and the assignee can communicate and exchange information.

Example:

If you get a task and you need clarification, have questions about how to process it, or have a first result and want to know how to proceed, go to the Feedback tab and click + Add feedback. Then, write your message in the dialog box. You may also attach documents to the report. When you save the task, it will appear bold (unread) in the creator's "From me" folder, and he will get an email notification (if his settings include this).



The dialogs are recorded as history. You can always track who, what, and when something was changed or written.

In each feedback report, you can record the hours you have spent in the Hours spent field. All entries are added up, and the sum appears under the "More" tab.

Task "To me" is completed

If you think to have done your job, change the status of task to Completed. The task disappears from your main folder, "To me," moving to the subfolder "Completed." In the creator's account, the task will move from "From me" to the subfolder "Closed."

You can also set the status of the task as On hold, giving the task creator the opportunity to decide how to continue. If he is satisfied with the result, he will set status of task to "Completed." Otherwise, he will compose feedback for you and set the status back to "In progress." Tasks may be put on hold for other reasons (e.g. to await a decision or other action).

Forward tasks

You can forward any task you get. Open the task, click on Assign to, and change the assignee. You can keep yourself as a second assignee or give a copy of the task to yourself so that you can monitor it.

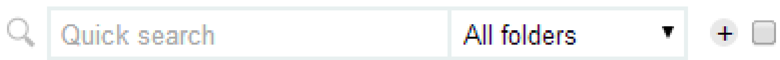
Subtask

From each task, you can make one or more subtasks. Select a task, right-click, click New sub task, add a task, and save it. In front of the main task a + will appear. By clicking on +, you will see all subtasks. The task creator also can see if and to whom subtasks were assigned.

Filter / Search

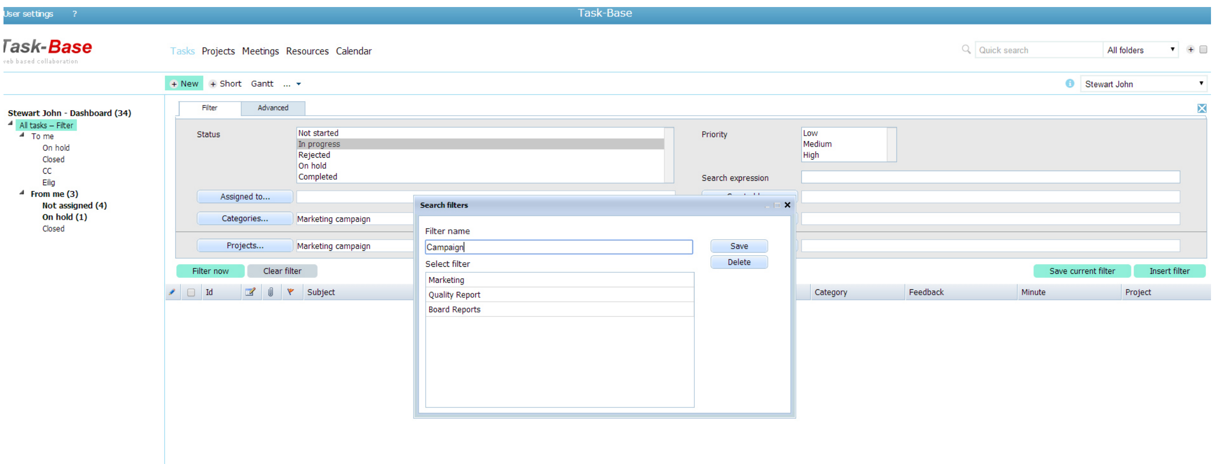
There are two search options: the Quick Search (to the right on the top menu bar) and the All tasks-Filter on the left menu.

In the Quick Search, you have a full-text search of all tasks that you are authorized to see. You can search in all folders or only in the current folder. The search can be expanded to include all documents when you click on +.



In addition, you will find an extensive search filter at your disposal on the left menu in All Tasks-Filter. You can search or filter by different criteria but only from tasks you are authorized to see. Enter your search criteria, and click on Filter now. In general, you can see only those tasks that are related to your team, your own tasks, and the tasks that you have assigned to others. The administrator can give you the right to see tasks in which you are not involved. For example, as a manager, you may want to see all of the tasks in your organization.

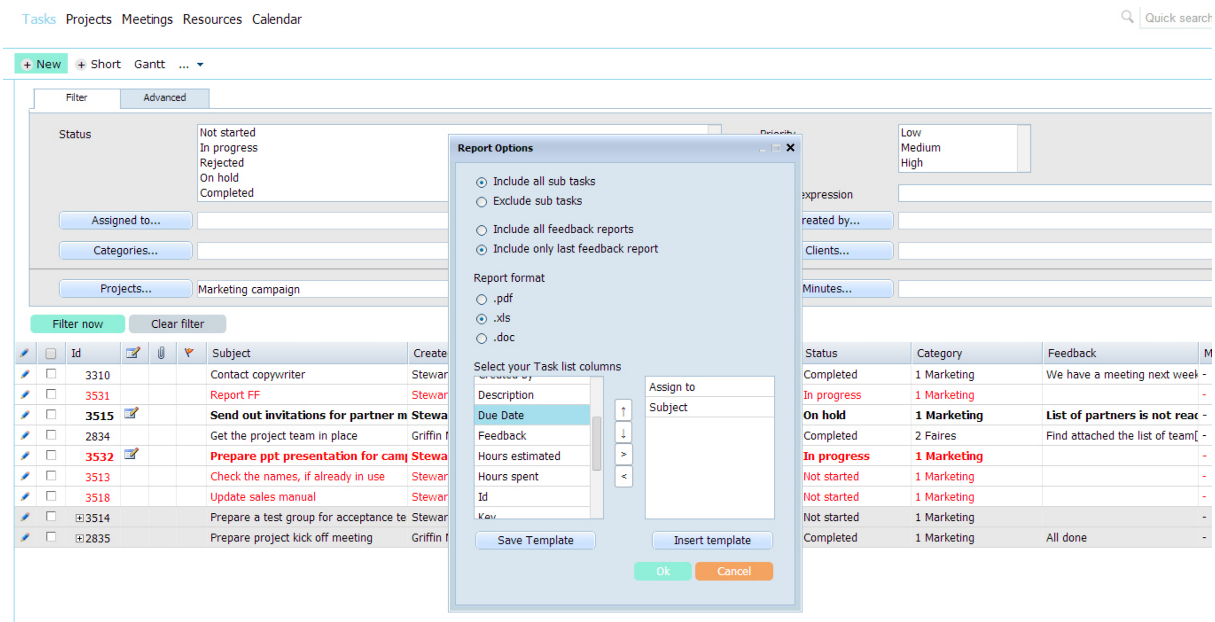
Search settings (filters) can be saved. Enter the desired settings in the filter and click Save current filter. Give a name to this search filter and click Save current filter. To use these filters later, click Insert filter in the filter dialog, select the desired filter, and click Insert filter. The stored parameters are then set automatically.



Create reports from task lists

From every task list, you can create a report.

Select the tasks (you might use the search function) for the report (report can be created only if no tasks are checked!). Click the "..." menu and Create Report. Select the desired file format (PDF, Word, or Excel) and then OK. The file created can be saved and edited as you like.



You can choose the columns you want to display in the report. The selection you make can be saved as a template. To do so, click Save Template, name the template, and click Add. The next time you want to create the same report, you can use the stored template. Click on Insert template, select a template from the list, and click on Insert Template, then OK.

Email Functions

Create tasks from email

In the flood of emails that we receive every day, there are often "To dos." These can be converted simply from emails into tasks in Task-Base.

Write an email or select the email in your inbox to be converted into a task. Then, click Forward.

It will be send to a Task-Base address defined by the administrator (e.g., Task-Base@ourcompany.com). At first, you write the initials or the name of the person to whom the task will be assigned in the Subject field. Then, enter two slashes and then the subject of the task (e.g., TH//edit contract).

You can set a due date for the task by email too:

Name(or initials)//*31.05.2014*//Subject….

Or

Name(or initial)/*31.05.2014*/Subject….

Dates formatted as 1.6.14 or 1.6.2010 are also accepted.

You can allocate a task that you received by email to a project and a category:

For example:

Name(or initial)/*31.05.2014*/_ID_kat_Subject….
("ID" means Project ID; "kat" means code of category)

Name(or initial)/*31.05.2014*/_ID_Subject…. (only project)

Name(or initial)/*31.05.2014*/_ kat_Subject…. (only category)

Email sender must be a Task-Base User with a known email Id in Task-Base.

Otherwise, the email will be ignored.

The email will be displayed as a task in the Task-Base folders. The email's subject will be the task "Subject," the email body will appear under the task's "Description." Attachments will be show under "Documents."

Send Feedback via email

The recipient of a task must be defined as an email user in Task-Base.

A "Contact" (nonuser), will receive his tasks only by email. The recipient can reply (feedback) to this task via email and can also change the status to "Completed." The buttons Feedback and Completed are available in the email.

Tasks created offline with Excel

To import tasks from an Excel sheet, you have to use a default template. You can download this template in Task-Base by clicking Download task import template under **?**. All columns are predefined, and they correspond to the fields in the task dialog. Please note: Use only people's initials (for assignee, copy, and client).

To import tasks in Task-Base, go to From me (no task in the grid should be checked!). Then click the "..." menu and select Excel Tasks-Import, browse, select the Excel sheet with your tasks, and then click ok.
All tasks are imported and distributed in Task-Base. This is especially helpful for multiple tasks that are recurrent (e.g., audits).

Important! The Excel table should not be open in other applications when it is being used by Task-Base.

Meeting Manager

To create an invitation or meeting minutes, go to the menu bar on the left side, select Minute/Invitation and click + New. You will get a list of all teams for which you are entitled to create Minutes/Invitations. Double-click on a team to access the meeting form.

Header

In the upper part of the Minutes/Invitations form, enter the Subject of the meeting. By default, the current user is the minutes' creator. Enter the Date and time of the meeting. If you would like to associate the meeting minutes with a project, select the project in the drop-down menu of Project. The meeting minutes will be displayed in the Project form under "Minutes/Invitations." Of course, this is only true if you use the module "Project." All information will automatically appear in the header when you click on the button Header or change your status to "Invitation" or "Distributed".

Edit Header

For each team, commission, or any entity (in Task-Base all called "team"), you can create your own meeting minutes header if you are authorized to create minutes. Open a new minute form, enter the address of your organization, and add your company's logo in the text field under tab Minute/Invitation. Highlight the desired part and click Templates, then Save /(replace) header. You can always insert or remove the header by clicking the button Header. The header will automatically show in minutes by status "Invitation" or "Distributed". (For other options, see "Minute Options.")

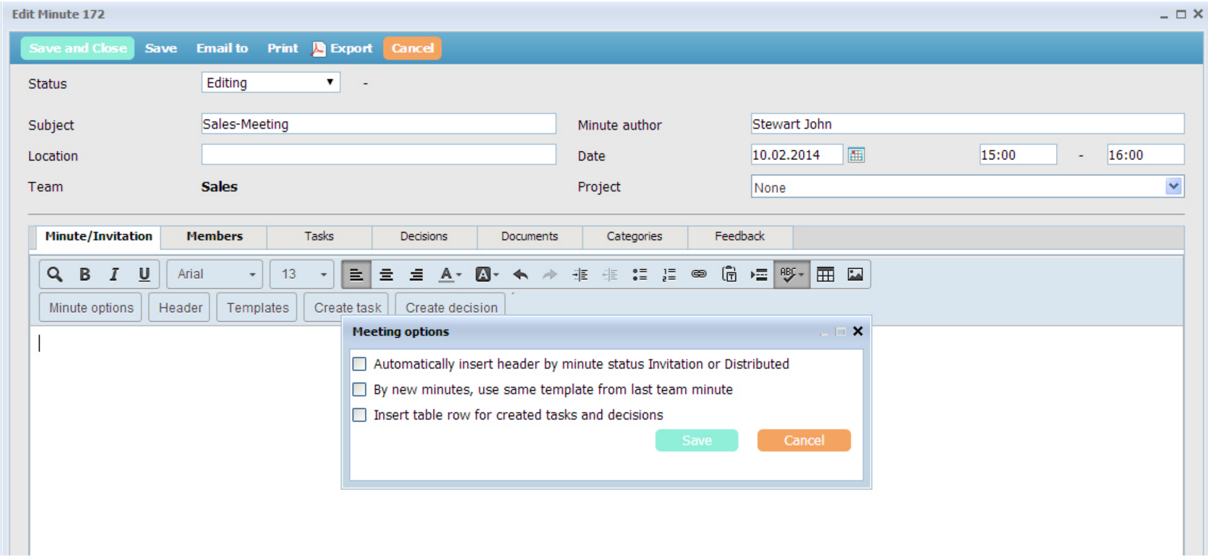
Create Template

For each group, commission, or entity (in Task-Base, "team") you can create templates (e.g., a default agenda). Open a new minutes and edit your template (or copy it from another program, such as MS Word) in the text field under the Minute/Invitation tab. Highlight the desired text, click Templates, add a title, and then click Save template. To insert a saved template, click Templates, select the desired title, and insert the template. The last inserted template (e.g. agenda) can optionally be automatically inserted into the next new minutes.

Minute Options

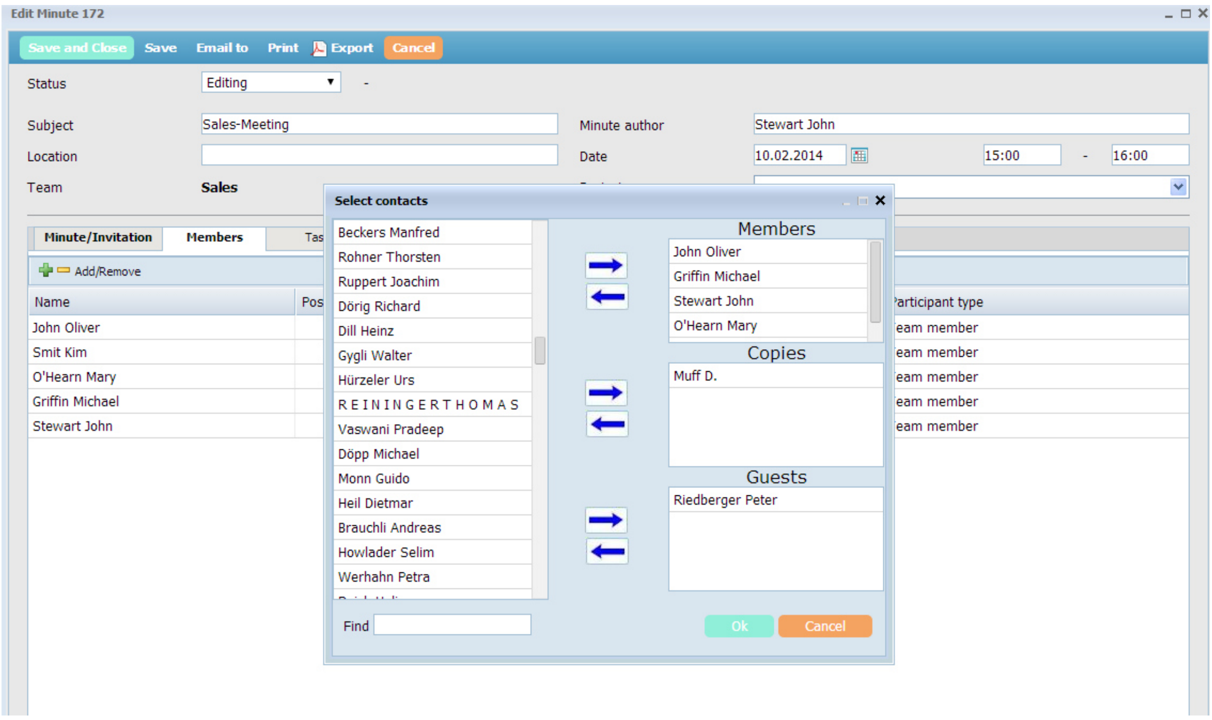
The following minute options are available:

- Automatically insert header by minute status Invitation or Distributed
- By new minutes, use same template from last team minute
- Insert table row for created tasks and decisions (If not checked tasks and decisions will be normally created, but not inserted as table rows in the minute text. Tasks/decisions will appear under corresponding tabs)

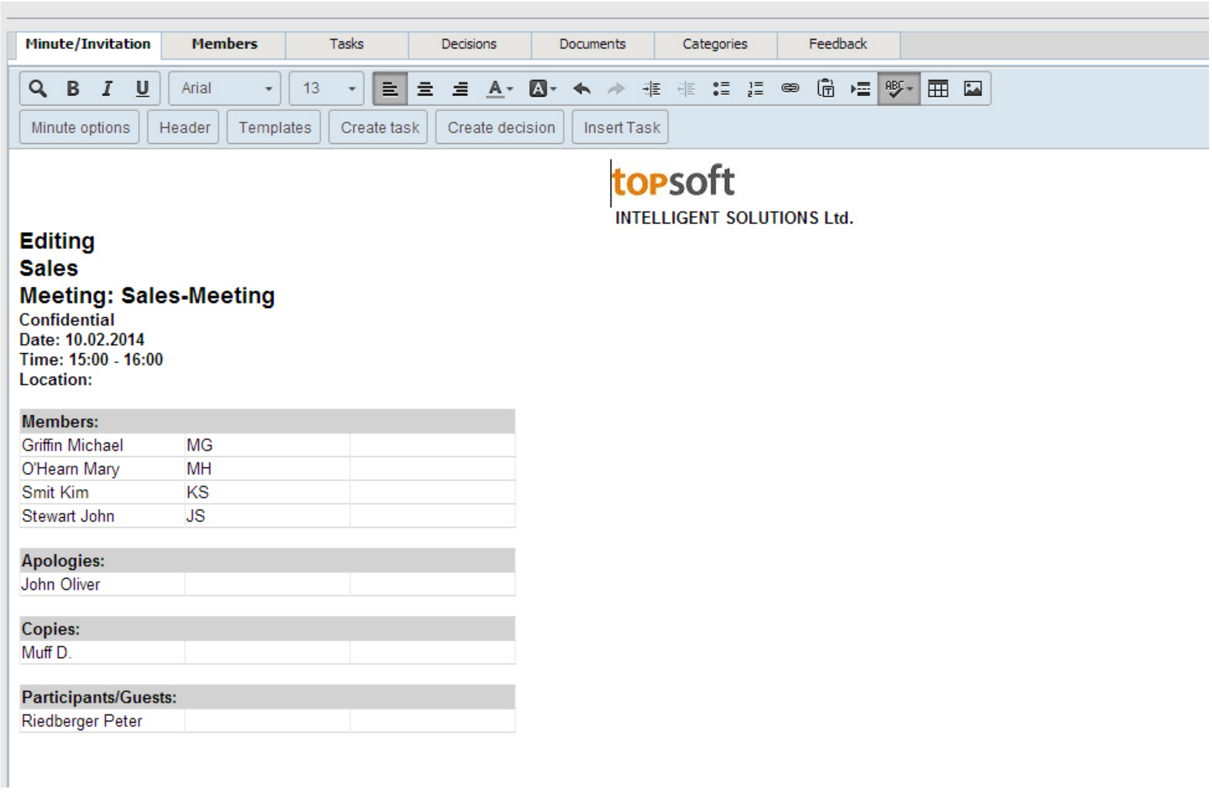


Members

Under the Members tab, you will find all members/participants of/in the selected team. Teams are created by the “Administrator” or “Authorized User.” If a member is absent at the meeting, put a checkmark in the checkbox next to his name. By clicking Add / Remove, you can edit the list of participants, adding new guests or copy receivers of the minutes.

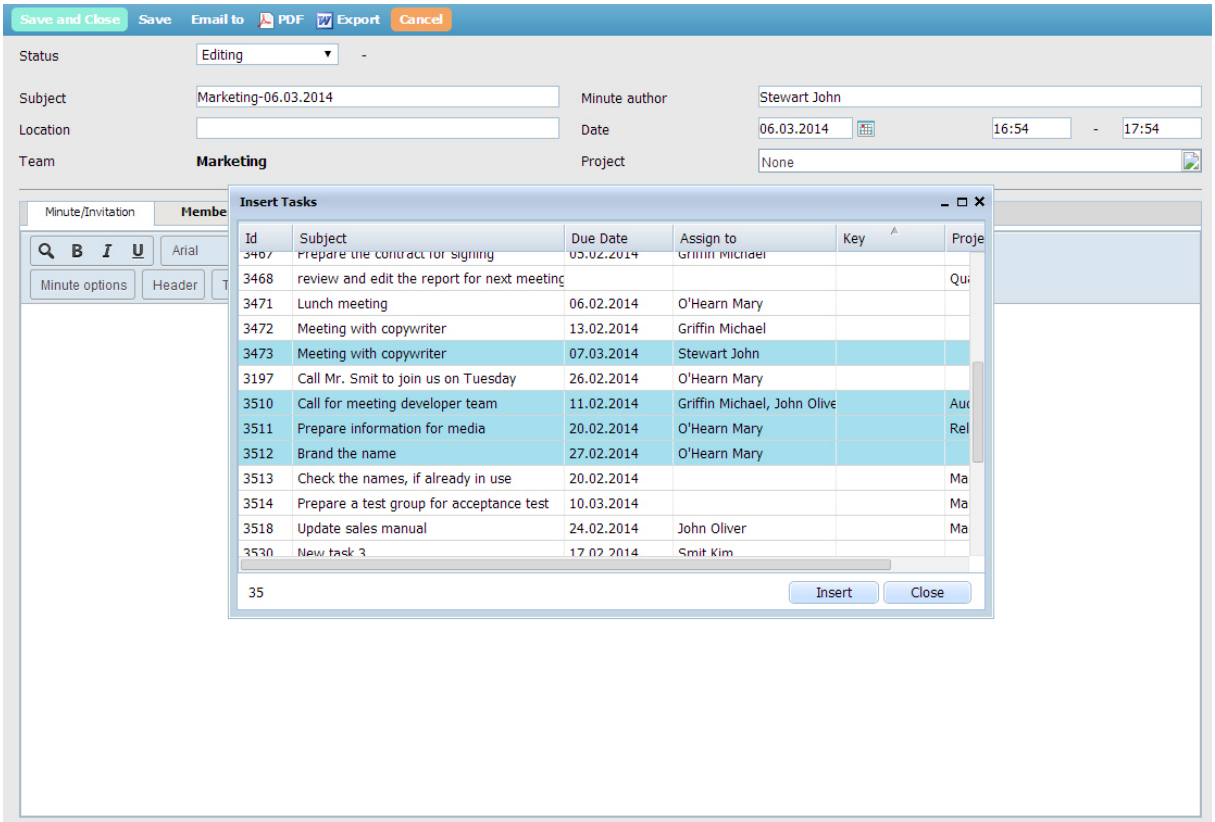


All information appears automatically in the minute header.



Invitation with open items (Insert tasks)

Open items, or themes for meetings can be created as tasks before a meeting takes place in the folders “To me” and “From me.” To create an invitation, go to the menu, click Minute/Invitation, and click + New. Go to the tab Minute/Invitation. Now, move the cursor to the point in the agenda where you want to insert the open item (the beginning of that line), and click Insert Task. You get a list of all tasks with the status Not started or In progress. Select the tasks you want to insert at this point. To select multiple tasks, hold down the Control (Ctrl) button, select the desired tasks, and click OK. All tasks will be inserted with Subject, Assignee, and Due Date. These tasks will also appear automatically in the list of tasks under tab Tasks.



Distribute the invitation by clicking on the icon Status and selecting Invitation from the dropdown menu. The header is automatically inserted. Click on Save + Close.

Writing meeting minute

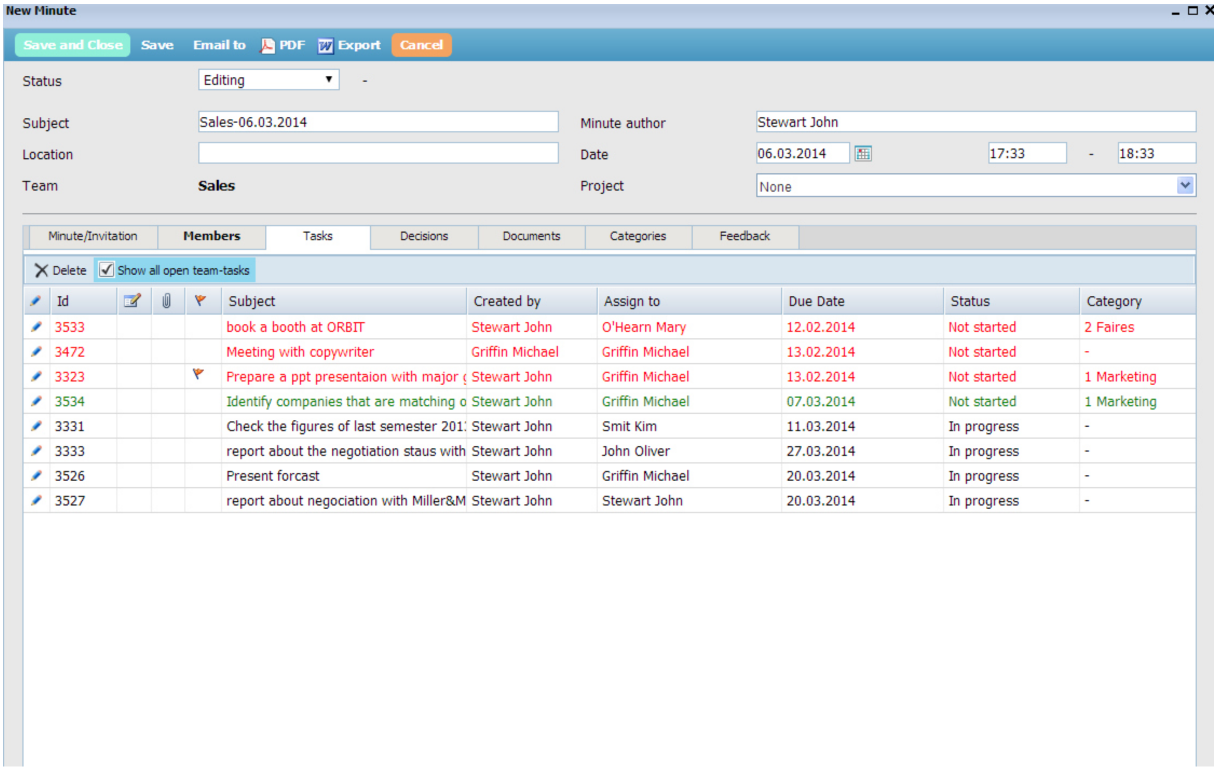
To write an invitation, or meeting minutes, go to the menu to Minute/Invitation and click + New. If you have a default agenda stored as a template (see Create Templates and Minute options), it will automatically appear under Minute/Invitation. You can also create an ad hoc agenda. Write your minutes as usual.

You can Save the minutes and continue to write them at any time.

Important! Ensure that a Minute in the status "Editing" can be seen by all team members who have the authority to create minutes. Permissions are assigned by the "Administrator" or "Authorized user." A minute with the status of Invitation or Distributed is sent to all meeting participants in Task-Base and sent by email, in addition, if required.

You can distribute the minutes by selecting the status Distributed. The header is automatically inserted (see Minute Options). Click on Save + Close.

At the beginning of each meeting, you can view all open tasks from previous meetings. Go to the Tasks tab and check Show all team tasks. All open tasks of all team meetings will be displayed.

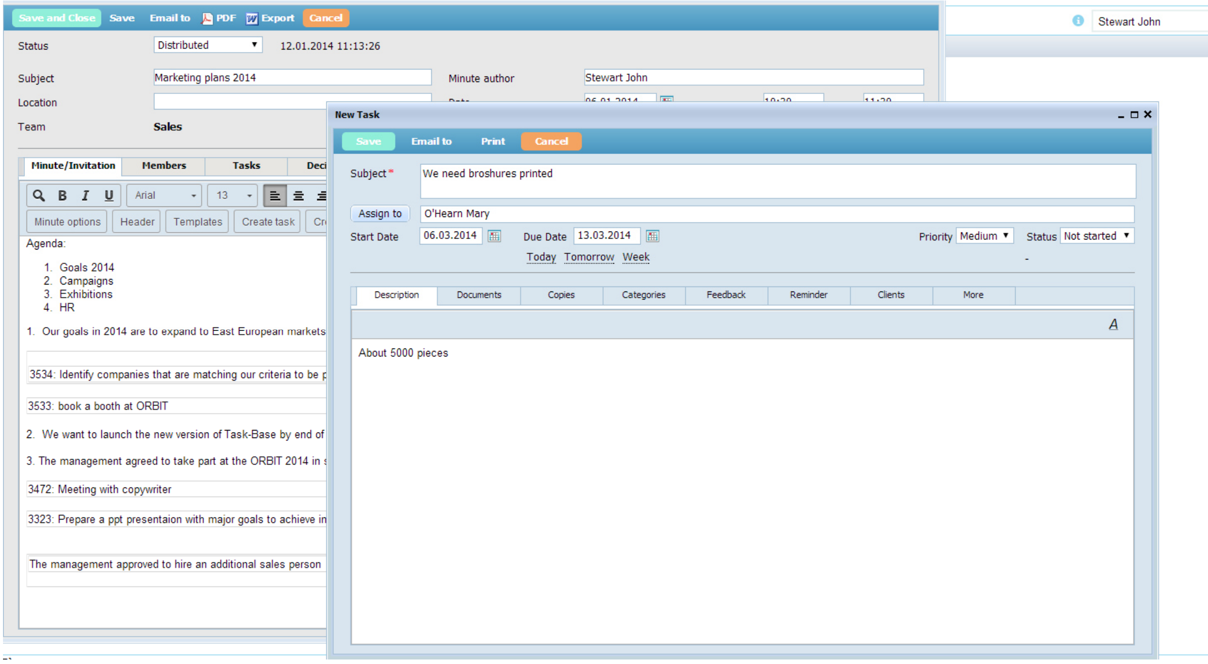


Tasks from minutes

To create a task directly from a minute, highlight the relevant text and click Create Task. A task form will open with selected text in the Subject field. Now you can add other parameters where needed (e.g., Assign ... / Copy / Key / Due day ...)

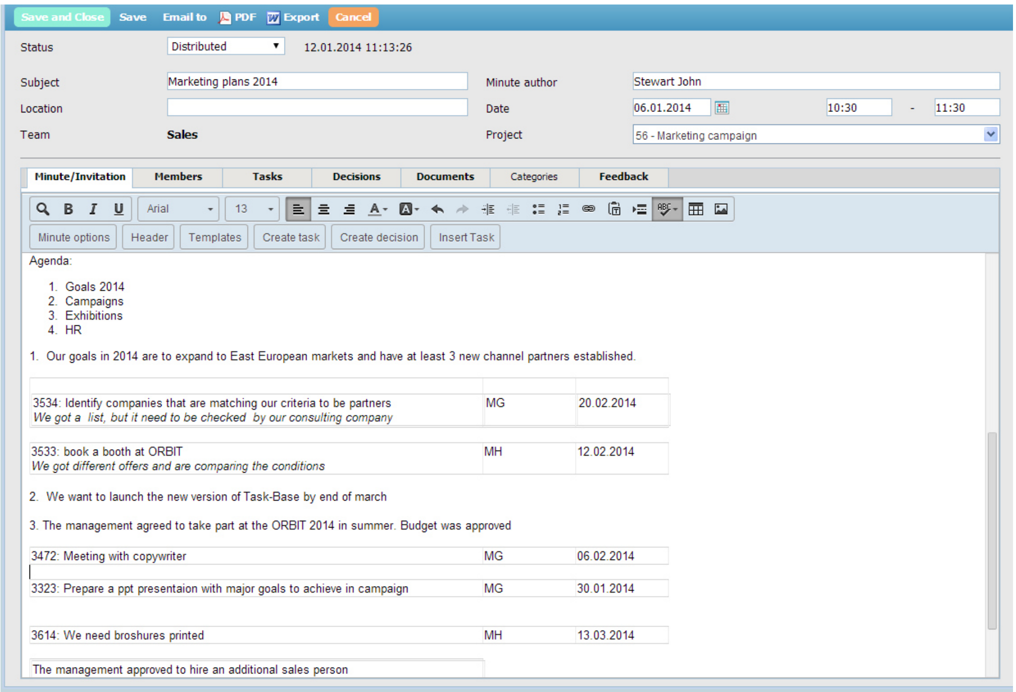
OR

Position the cursor in the minute text where you would like to insert a task. Click on the icon Create Task. The task form will open to create a task as usual. Click Save to insert the task at the desired location. The task will also appear in the task list under the tab Tasks.



Feedback on discussed items

When discussing an open item (task) at a meeting, you can write feedback directly in the task cell in a new line under the task subject in italics. The text is automatically copied as feedback in the task form itself. This is especially valuable for items that are regularly on the agenda.



Decisions

You can create decisions directly from the minute by highlighting the relevant text and clicking Create decision. The text is automatically copied into the decision form. You can specify copy recipients, if needed, and then save.

OR

Click on Create decision, write the decision directly in the form, and then save.

Decisions appear in both, your “Decisions” folder as well as in the minute form, under the tab “Decisions.”

Documents

You can attach any kinds of documents to the meeting minutes. These are stored in the Task-Base database. All recipients of Minutes/Invitations can open these documents.

Categories

It can be helpful for you to assign all minutes to categories. Click on Add category to open your categories tree, select the desired categories (by holding down the Ctrl key), and then click OK. Categories are created by the “Administrator” or an “Authorized User” for the whole organization. The assignment to categories is mainly useful for future searches of minutes.

Feedback

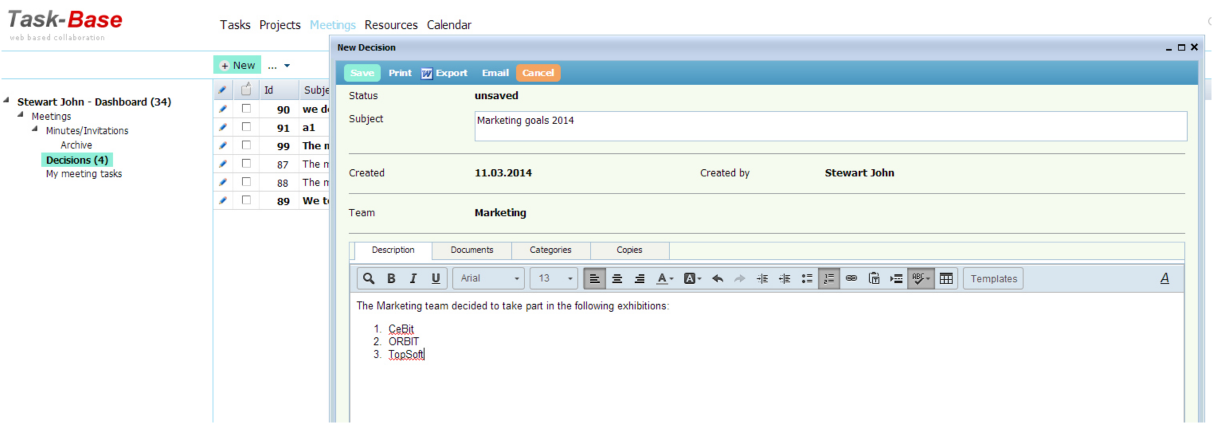
All participants can add their feedback to invitations or minutes when, for example, they want to bring a guest to the next meeting or put a particular topic on the agenda.

PDF and .doc exports

On the top of the minutes form, you will find button to create a PDF file or to export minute contents to an MS Word .doc file.

Decisions outside of the meeting minutes

Decisions are usually created directly in the minutes. It is also possible to create decisions outside of the minutes. Go to your Decisions folder and click on + New. All teams for which you are allowed to create a decision will be listed. Select a team to open the decision form. Enter the decision text and parameters and then Save. All team members will receive the decision in their “Decisions” folders.



Project Manager

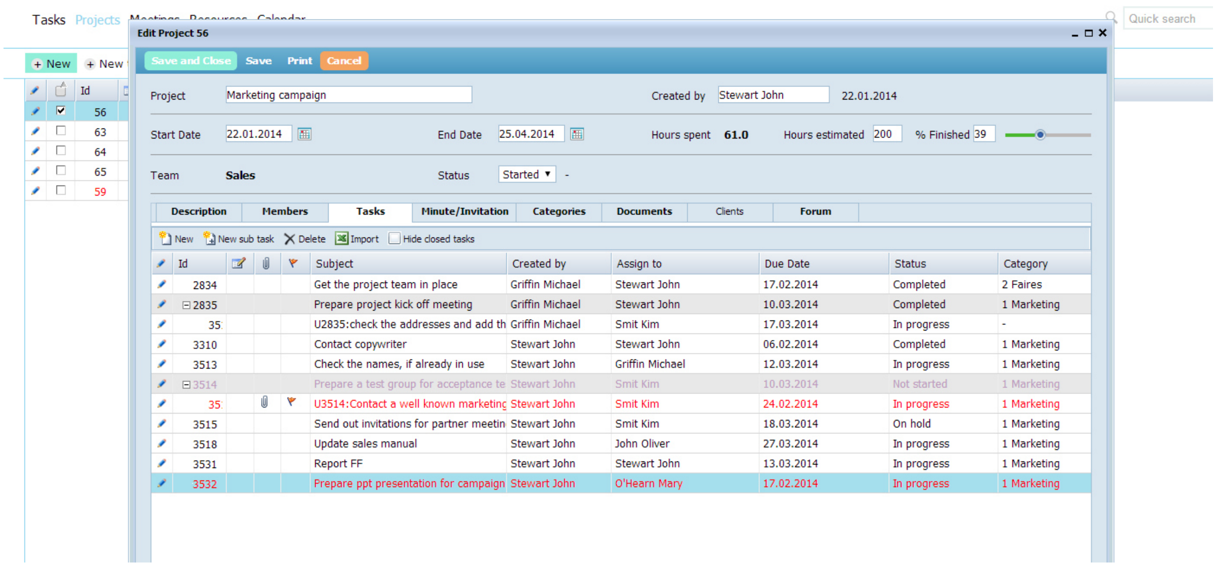
To create a project, you need authorization within a team. Teams are created by an “Administrator” or an “Authorized User.” You may have this authorization for several teams and a team can have multiple projects.

Go to the menu on Projects and click on + New. A list of all teams for which you are allowed to create projects will be displayed. Select a team to open a new project form. Enter the project name (Subject), Set the Start date and End date and enter the Hours estimated. Hours spent are calculated automatically from all entries in the task feedback.

Project Tasks

You can write the specifications of the project with all tasks (steps) under Description. You can assign tasks to team members directly from the text. To do so, select a text block and click Create task or just click Create task. All tasks will not be distributed until you change the project status to Started and Save it. Project team members will find their tasks in their "To me" folders. The Project Manager (tasks creator) will find all tasks in his "From me" folder with reference to the project. In the Project form, all project team members can see all tasks listed under the Tasks tab. You can categorize the project itself and all its tasks to allow a quick search. The category of the project is automatically inherited by all project tasks.

Any types of documents can be attached to the project and made available to the entire team.



Meetings minutes and project reports

You can write minutes for project meetings with the Task-Base Meeting Manager. Assign the meeting minutes to a project by selecting the project in the dropdown menu. All project meeting minutes will be listed under tab Minute/Invitation in the project form and will be visible to all team members.

Categories

Categorizing projects can be helpful in the search function. Categories assigned to a project are automatically inherited by all project tasks.

Documents

You can attach any type of document that can be accessed by all team members. Documents marked as Intern cannot be seen by customers.

Customers

You can assign a Customer to the project. This is also an important search criterion.

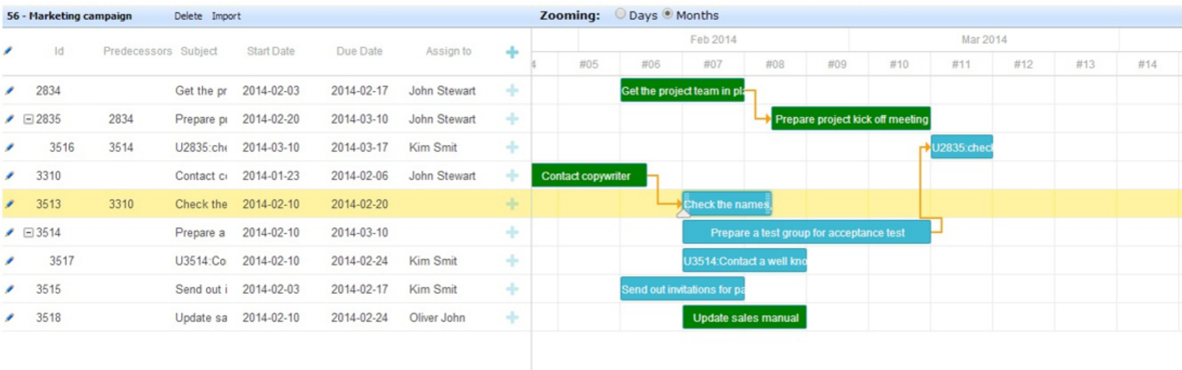
Forum

All team members can compose feedback (reports/messages, discussion posts, etc.) that will be visible to all team members.

Gantt chart

You can plan your project with the Gantt chart. Select a project, and click Gantt. All project tasks are displayed in a Gantt chart.

Tasks that you create directly in Gantt (with +) are automatically transferred to the project form and can be tracked in Task-Base, just as any other task. The advantage of the Gantt chart is that you can define dependencies among tasks. All tasks are displayed with each dependency as a bar in the chart.



Functions in Gantt chart

- +: Create a new task or subtask.

- Delete: Delete selected task.

- Import: Using the import function, you can import tasks from an MS Project via an XML file.

- Dependencies of tasks: The dependence that is most widely used between tasks in a project is that task B should start only after task A has been completed. Clicking in the (cell) Predecessors field of a task, you can define dependencies between this task and other tasks. Changes in Gantt are automatically saved.

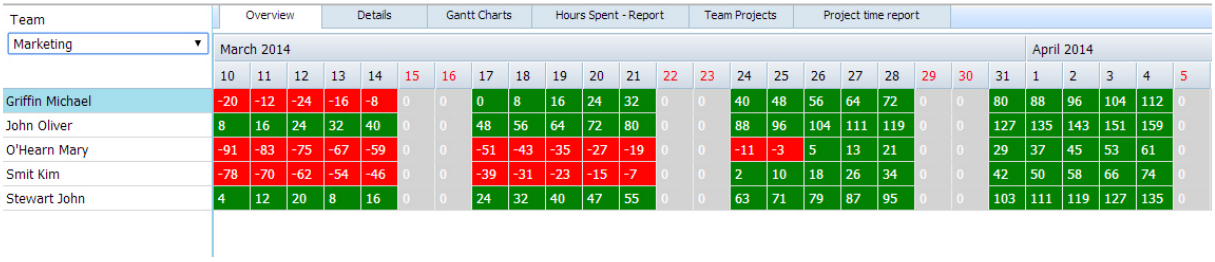
Bar chart

In the right field of the Gantt chart, the tasks are displayed as bars.

The Start and Due date of a task can be changed by moving the bar. Task % finished will show in green. You can zoom on the timeline in the bar chart by days or months.

Resources

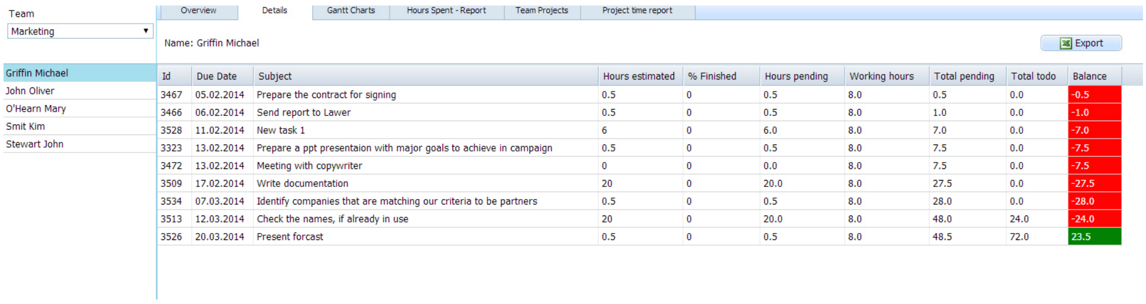
The module resources provide an overview of the workload of your employees. First select a team from the dropdown menu on the upper left side of the form. Then, all team members will be listed. To the right under the Overview tab, you will see a timeline for each person. With the scroll bar, you can scroll through the calendar. On each date, you will see a box with a number. The number indicates how many working hours the person has accumulated up to this date. The nominal hours of his tasks will be deducted from the working hours/day. (Working hours /day are set by the administrator in the contact form for that person.) On the due date, you can see the difference between available working hours and the sum of the accrued hours up to this date. If the field is green, the nominal hours do not exceed the work hours. If the box is red and there is a minus in front of the number, then the employee is overloaded. If the employee is about to be overloaded soon, that employee's data boxes will appear yellow from today to the date on which he will be overloaded.



	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5
Griffin Michael	-20	-12	-24	-16	-8	0	0	0	8	16	24	32	0	0	40	48	56	64	72	0	0	80	88	96	104	112	0
John Oliver	8	16	24	32	40	0	0	48	56	64	72	80	0	0	88	96	104	111	119	0	0	127	135	143	151	159	0
O'Hearn Mary	-91	-83	-75	-67	-59	0	0	-51	-43	-35	-27	-19	0	0	-11	-3	5	13	21	0	0	29	37	45	53	61	0
Smit Kim	-78	-70	-62	-54	-46	0	0	-39	-31	-23	-15	-7	0	0	2	10	18	26	34	0	0	42	50	58	66	74	0
Stewart John	4	12	20	8	16	0	0	24	32	40	47	55	0	0	63	71	79	87	95	0	0	103	111	119	127	135	0

Under the second tab, Detail, you can see all the tasks for a selected person in the left pane. For each task, there is detailed information about the workload, how many hours have already been completed, or what % of the job is already done. This results from time record entered in the feedback for every task.

You can export the table to Excel by clicking on the icon Export at the top right.



Id	Due Date	Subject	Hours estimated	% Finished	Hours pending	Working hours	Total pending	Total todo	Balance
3467	05.02.2014	Prepare the contract for signing	0.5	0	0.5	8.0	0.5	0.0	-0.5
3466	06.02.2014	Send report to Lawer	0.5	0	0.5	8.0	1.0	0.0	-1.0
3528	11.02.2014	New task 1	6	0	6.0	8.0	7.0	0.0	-7.0
3323	13.02.2014	Prepare a ppt presentaion with major goals to achieve in campaign	0.5	0	0.5	8.0	7.5	0.0	-7.5
3472	13.02.2014	Meeting with copywriter	0	0	0.0	8.0	7.5	0.0	-7.5
3509	17.02.2014	Write documentation	20	0	20.0	8.0	27.5	0.0	-27.5
3534	07.03.2014	Identify companies that are matching our criteria to be partners	0.5	0	0.5	8.0	28.0	0.0	-28.0
3513	12.03.2014	Check the names, if already in use	20	0	20.0	8.0	48.0	24.0	-24.0
3526	20.03.2014	Present forcast	0.5	0	0.5	8.0	48.5	72.0	23.5

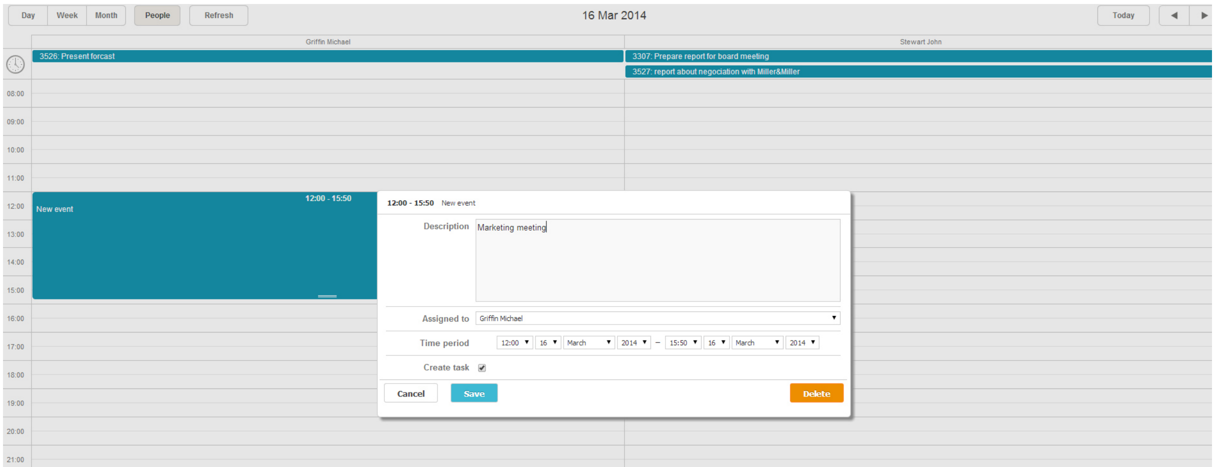
You can see all of a selected user's tasks as well as his Hours spent report, in which his hours spent are listed for each project, under the tab Gantt in Gantt view.

The tab Team Projects lists all of the current team's projects, with status, hours estimated, hours spent, and the difference. Select a project to create a time report under the next tab, Project-time report. In this report, all hours spent by the various team members are listed by task and with date of entry.

Click Export to Excel to export reports in an Excel spreadsheet.

Calendar

In the calendar, all meeting dates and the start and due dates of all Task-Base tasks are automatically entered for each user. These dates can be changed in the calendar but not deleted since they are automatically synchronized with the task module. You can also assign tasks directly in the calendar. (In the appointment form, tick the checkbox Create task.) Tasks will appear in the task module as all other tasks and can only be deleted there. Each user can also enter any other normal appointment. He can see and change his appointments and those of other users in his team.



Administrator Manual

Administrator / Authorized user functions

In Task-Base, several people can take administrative or authorized users roles. They have their own menu on the top right side with the following functions:

People, Teams, Categories (and, for administrator only: Admin options).

Admin Options

Here all of the organization's data is entered and maintained, including an email account, license key, and language.

- Language: The language defined here is automatically set for all users. However, a user can change the language settings for themselves under User Settings.

- Default Font: Here you define the default font/size used by your organization in your editor.

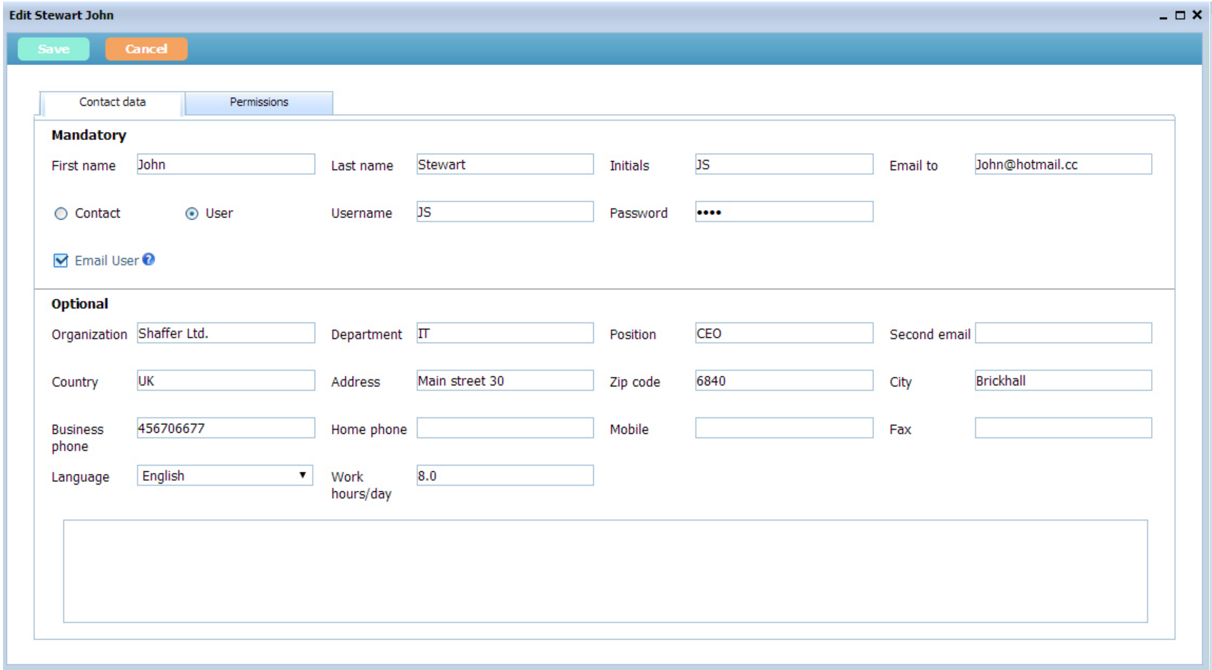
- Allow sending emails for: The administrator sets for the whole organization whether tasks/meeting minutes/decisions may also be sent by email.

People

Click New to open a new contact form.

Here you capture contacts for the entire organization. All mandatory fields must be filled in. Under Authorization, you specify which permissions a user may obtain.

A person defined as a Contact cannot log in to Task-Base. To define a Task-Base user, check the box User. A person checked as an Email User may receive, in addition, all tasks and meeting minutes by email.



Disabled: You can disable a user. All of his data will remain in the system, but he will no longer be able to login to access it and will not need a license.

Customer: Marked users who do not belong to your organization are customers. Feedback or documents marked as “Intern” cannot be seen by customers.

Modules: In the contact form, you define which modules will be visible and can be used by this User: Meeting/Project/Resources.

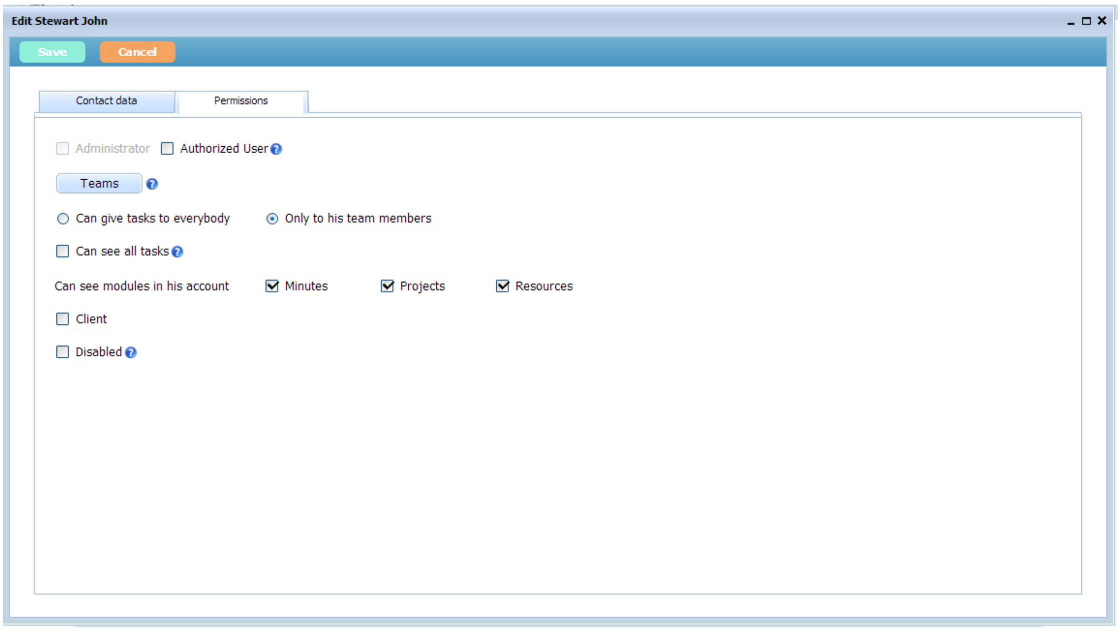
Admin: The admin will have full administrative rights.

Authorized user: This user has all admin rights except Admin options.

Define whether this user Can give tasks to everybody, or Only to his team members (default setting).

With Can see all tasks, you give this user the right to see all of the tasks of the organization in the Search function.

Import contacts: You can directly import User/contacts from an Excel file. Download the template under “?” / Download User Import Template.



Teams

A team is a group of people working together on a project and/or who meet up regularly and write meeting minutes. First, the administrator gives the team a name (e.g., project team, Commission Working Group, management, etc.) Next, he selects the people who belong to the team and adds them as members. Team members' names are listed in the team form. For each team member, you can check the appropriate column to give permissions to create minutes and/or projects.

The column "Head" gives no additional permissions. A "Head" appears in the participant list of a minutes file.

Categories

Click New to open new category form.

To create a subcategory, select the category and click on New sub-category and so on in the top menu bar.

The result is a tree that you can modify and supplement any time.

Categories are primarily important for the Search function. They are available to all users, since tasks and minutes should be uniformly categorized and stored within an organization.


Categories
New
Delete
Print
New sub category
Cancel
TaskBase
Users and contacts
Teams
Categories
Category code
Category
4
Quality Management
5
Finance
3
Produktion
1
Marketing
1
Campaigns
2
Faires
3
social media
2
Sales