

## Team.Do – Task Management: Grouping Information

## 1. Sorting and Filtering:

When managing projects with a lot of details, many tasks may accumulate. You can control the information by simply changing the view in the Tasks page, by

	Projects	Tasks	Gantt	Contac
	Search 2	► Filter	D	
	Sort	▼ New T	ask More	• C
sorting and filtering				

1. General Filtering by Project (or sub project): If you want to view only tasks of a specific project, you can simply select the project (or sub project) from the list at the top of the page

	1-5-					
Team.Do 😻	Project Social Media 💌 in Productive Solutions Edit Project					
-	Projects Tasks Gantt Contacts More Admin					
	Search Filter					
Help Restrict access to project	U v Sort v O New Task More v C					1 - 1 of 1
Sync to Outlook	Task		Due date	Assigned to	Priority	Project
	a 🖄 Social Media Campaign - Autumn Survey Results	18 cm	1 Feb	Shiri Huberman-L	e High	Social Media
Sync to Google						1 - 1 of 1

2. Filter: Click on the ▶ next to "Filter" to expose the filter menu:

Projects	Tasks	Gantt	Contacts	More	Admin	
Search	Filter					
Priority	Status	Creator	Assign	ed to	Admin	
Priority Show All	Status Show All	Creator	Assign ▼ Show		Admin Show all tasks ▼	

By default, users with Employee, External User or View Only permissions will see only tasks they are involved in when they enter the Tasks page. Admin and Project Manager see all tasks in the system.

You can filter by task priority, status, creator, owner ("Assigned to") and if you have Admin permissions you can choose to see all tasks or only the ones they are directly involved in.

3. Search: You can filter by searching for specific text within the tasks.





## 2. Grouping

Sometimes there are just too tasks and too much information to manage. You may want to group information. Grouping information here means putting a few similar or related tasks together. It allows clarity and helps identify issues that may need your attention. You can group tasks by their different attributes, for example: Grouping by task's Priority

ID	Task		Update	Due date	Assigned to A	Priority v	<u>Status</u>	Project	Creation
Priority: Urgent									
🗏 ☆ 79	11% Make a movie wwwww w	£8	16/11/18	23/11/18	Nikola Tesla	Urgent	11%	Marcom	17/05/18
🗏 ☆ 5	100% Add Electricity עדכון	13 œ	17/10/17	07/05/17	Nikola Tesla	Urgent	100%	Eiffel Tower	14/05/15
<ul> <li>Priority: High</li> </ul>									
🗉 ☆ 11	81% Build the Eiffel tower	-	17/10/17	07/04/16	Alexandre Eiffel	High	81%	Eiffel Tower	06/12/15
🗏 🦙 75	Security Check Due to latest virus on a sales rep laptop, we will be running tight security checks for the next couple of weeks	18	27/05/18	29/05/18	Michelle Kofler	High		IT and Ops Manag	17/05/18
🗏 🏠 16	Build stage 2 build stage 2		17/10/17	21/07/17	Nikola Tesla	High		Eiffel Tower	08/12/15
🗏 👷 3	Eiffel tower blueprints Task Completed	-	16/11/18	27/11/18	Rafael Moreno	High		Eiffel Tower	14/05/15
<ul> <li>Priority: Norma</li> </ul>									
🗏 🏠 15	Build stage 1		16/11/18	27/11/18	Gustave Eiffel				08/12/1
🗏 🏠 31	build a building		17/10/17	01/09/16	Gustave Eiffel			Eiffel Tower	13/11/10
🗏 🚖 30	build a building		17/10/17	02/12/16	Gustave Eiffel			Eiffel Tower	13/11/16
🗏 🏠 81			18/09/18	17/10/18	Michelle Kofler			Marcom	17/05/1
🗏 🚖 78	Create wish list for training Interview all employees using the new platform and put together a needs analysis for training	Ľ8	16/11/18	3 Jan	Nikola Tesla			IT and Ops Manag	17/05/18
E 🚖 6	Payment Please see attached invoice and details		17/10/17	22/12/15	Rafael Moreno			Eiffel Tower	14/05/15

To turn on the "Show Groups" option, navigate to the Tasks page setting: Click on the

Search		► Filter		
	Sort *	New Task	More V C	
			Search	
	Task		X Export	
	Social Med	ia Campaign - Autumr	🖶 Print	
		1.0	Settings	
E \\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	Define Surv	vey Goals Need to define	e obcounnô wune, en weà done	

More button and select "Settings".

Show Fields: Add your fields		ID Update			Rows in page: Sort 1:		▼ Priority ▼	Show	Groups		-		×
Reset columns	width	Start Due date			Sort 2 (internal):		ssigned to A	)	010020				
Hide Header Show Side Wir	<u>ndow</u>	Assigned to Priority	<b>x</b>		Reset Sort and Filters								
ID	Task						Update	Due date	Assigned to	Priority T	Status	Project	Creation
🗏 🏠 79	11% Make	e a movie w	NWWW W			L8	16/11/18	23/11/18	Nikola Tesla	Urgent	11%	Marcom	17/05/18
□☆ 5	100% Add	Electricity	עדכון			18 📼	17/10/17	07/05/17	Nikola Tesla	Urgent	100%	Eiffel Tower	14/05/15
🗏 🚖 11	81% Build	the Eiffel to	wer			-	17/10/17	07/04/16	Alexandre Eiffel	High	81%	Eiffel Tower	06/12/15
🗏 🚖 75	C Secur	ity Check D	ue to latest vir	us on a sales rep laptop, we will be running tight security checks for	the next couple of weeks	L8	27/05/18	29/05/18	Michelle Kofler	High		IT and Ops Manag	17/05/18
🗏 🚖 16	Build stag	e 2 build star	je 2				17/10/17	21/07/17	Nikola Tesla	High		Eiffel Tower	08/12/15
🗏 🏠 3	Eiffel towe	er blueprints	Task Comple	eted		-	16/11/18	27/11/18	Rafael Moreno	High		Eiffel Tower	14/05/15
🗉 🏫 15	Build stag	le 1					16/11/18	27/11/18	Gustave Eiffel				08/12/15

On the settings menu, click "Show Groups". The display of the tasks table will change accordingly (<u>see screenshot</u>). Tasks will be grouped according to the selected attribute in Sort 1 field and the internal sorting within each group will be by the attribute selected in Sort 2.



To turn off Grouping, click

You can expand or close each tasks group by clicking on the group (category) name:

