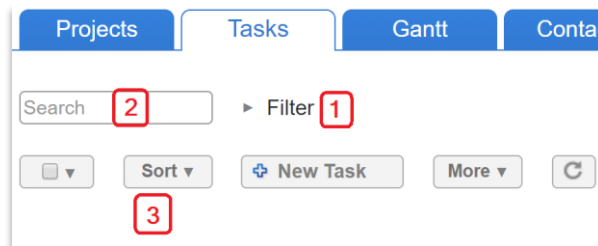


Team.Do – Task Management: Grouping Information

1. Sorting and Filtering:

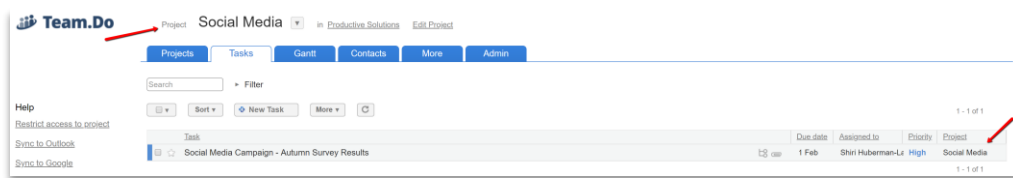
When managing projects with a lot of details, many tasks may accumulate.

You can control the information by simply changing the view in the Tasks page, by

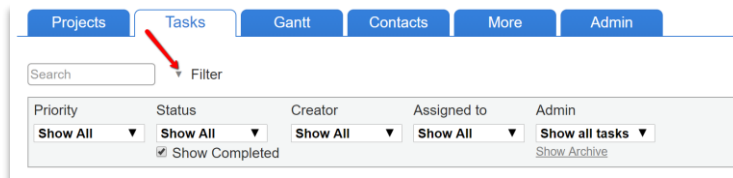


sorting and filtering

- 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



- 2. Filter:** Click on the ► next to “Filter” to expose the filter menu:



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.

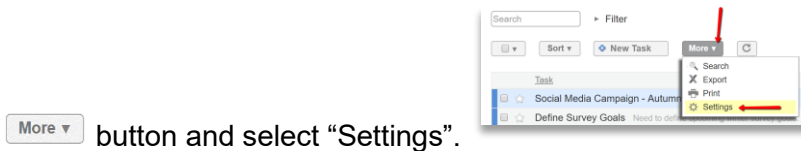
- 3. Search:** You can filter by searching for specific text within the tasks.

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	Priority	Status	Project	Creation
▼ Priority: Urgent								
79	11% Make a movie	wwwwww w	16/11/18	23/11/18	Nikola Tesla	Urgent	11%	Marcom
5	100% Add Electricity	יבדבד	17/10/17	07/05/17	Nikola Tesla	Urgent	100%	Eiffel Tower
▼ Priority: High								
11	81% Build the Eiffel tower		17/10/17	07/04/16	Alexandre Eiffel	High	81%	Eiffel Tower
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	27/05/18	29/05/18	Michelle Kofler	High		IT and Ops Manag
16	Build stage 2	build stage 2	17/10/17	21/07/17	Nikola Tesla	High		Eiffel Tower
3	Eiffel tower blueprints	Task Completed	16/11/18	27/11/18	Rafael Moreno	High		Eiffel Tower
▼ Priority: Normal								
15	Build stage 1		16/11/18	27/11/18	Gustave Eiffel			08/12/15
31	build a building		17/10/17	01/09/16	Gustave Eiffel			Eiffel Tower
30	build a building		17/10/17	02/12/16	Gustave Eiffel			Eiffel Tower
81	Produce a case study		18/09/18	17/10/18	Michelle Kofler			Marcom
78	Create wish list for training	Interview all employees using the new platform and put together a needs analysis for training	16/11/18	3 Jan	Nikola Tesla			IT and Ops Manag
6	Payment	Please see attached invoice and details	17/10/17	22/12/15	Rafael Moreno			Eiffel Tower

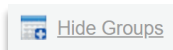
To turn on the “Show Groups” option, navigate to the Tasks page setting: Click on the



More ▼ button and select “Settings”.

ID	Task	Update	Due date	Assigned to	Priority	Status	Project	Creation
▼ Priority: Urgent								
79	11% Make a movie	wwwwww w	16/11/18	23/11/18	Nikola Tesla	Urgent	11%	Marcom
5	100% Add Electricity	יבדבד	17/10/17	07/05/17	Nikola Tesla	Urgent	100%	Eiffel Tower
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▼ Priority: Normal								
15	Build stage 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 ([see screenshot](#)). 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:

▼ Priority: Urgent								
79	11% Make a movie	wwwwww w						
5	100% Add Electricity	יבדבד						
▶ Priority: High								
▼ Priority: Normal								
15	Build stage 1							
31	build a building							
30	build a building							
81	Produce a case study							