

Document v1.0

Tasks

Creating, editing, and viewing in the Ecosystem

This document includes:

- Overview of the Global Tasks Hub
- Creating, editing, viewing, and deleting a task in a panel
- Inline editing of information in fields and sections
- Field, dropdown, and section interaction guidelines
- Panel construction and interaction guidelines
- Errors, dialogs, and notifications
- Additional features and functionality relating to a task

1

Tasks

Activity

Calendars

1

Past due

5

Due today

13

This week

Import

Create Report

2

New Task

Q

Search tasks

Filter

Sort byDue date

Task name	Assignee	Priority	Status	Due	
Attach banner assets to mobile app	Kelly Puttick	Medium	Past due	Jul 5	
Finalize breakout session content	Sammy McCormick	Medium	Complete	Jul 8	
Secure speaker panel	Cheslie Wasmer	Medium	Complete	Jul 8	
Schedule working sessions	Brenna McKim	Low	Not started	Jul 9	
Reach out to potential guest speakers	Shane Belchem	High	In progress	Jul 9	
Add process forms to team library once approved	Etienne Slyde	Low	In progress	Jul 9	
Research hotel block deals in February in Austin Texas	Saidee Moorman	High	In progress	Jul 11	
Book Sales team travel	Kaycee Pratley	Medium	Not started	Jul 12	
Send save the date email	Ronnie Reeday	Low	Not started	Jul 12	
Send post-event feedback survey	Miranda Kalkofen	Low	Not started	Jul 15	
Add Becca and Loren to team workspace	Almire Lorain	Medium	Pending	Jul 15	
Secure A/V vendor and get estimated cost	Haily Lahiff	High	Pending	Jul 18	
Print out signboards for on-location booth staff	Gerald Youngue	Medium	Pending	Jul 21	

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3

X

Not started

Give your task a title

Link to a project or session

Assignee

Start / Due date

Priority

Tags

Description

Add some helpful details to your task

Attach a file

Add a dependency

Add a subtask

Create Task

Tasks

Activity

Calendars

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Print out signboards for on-location booth staff	Gerald Youngue	Medium	Pending	Jul 21	

4

X

In progress

50% complete

Upload banner image to the Annual Sales Conference mobile app

in Annual Sales Conference

Assignee

Kelly Puttick

Start date

10/12/2019

Due date

10/24/2019

Priority

Medium

Contractor

Banner

Description

The assets are attached, just upload them to the app banner and double check the sizing to make sure it's not stretching or skewing, take a look at the dimensions they are recommending and let me know. Just leave a comment and I'll attach an updated asset matching the spec. If you have any q... See more

2 attachments

Add a dependency

Add a subtask

2 comments

Add a comment

Interaction guidelines

PROJECT: Tasks: Low complexity object

DATE: 10/7/2019

AUTHOR: Mark Iris

SCREEN

Task: Create, Edit, View

- 1

TASKS

The Tasks tab of the Planning Hub will display all the tasks associated with an account.
- 2

CREATE A TASK

Click "New Task" to create a new task record.
- 3

NEW TASK

The Preview Panel slides in from the right edge of the screen, over the global header, placing it at the highest plane on the Z-axis than any other component.
- 4

SELECTING A TASK

To view an existing task, click it in the table. The selected task will appear in its "selected" state in the table.
- 5

VIEWING A TASK

The Preview Panel will slide into view from the right edge of the screen, over the global header.

If you click another task in the list while the panel is open, it will appear in the panel immediately, without animating the panel.

×

1

👁🔖⋮

Not started

Give your task a title

Link to a project or session

👤 Assignee

📅 Start / Due date

📈 Priority

🏷 Tags

Description

Add some helpful details to your task

📎 Attach a file

🔗 Add a dependency

📋 Add a subtask

Create Task

×

2

👁🔖⋮

In progress50% complete

Upload banner image to the Annual Sales Conference mobile app

in Annual Sales Conference

👤 Assignee
Kelly Puttick

📅 Start dateDue date
10/12/201910/24/2019

📈 Priority
Medium

🏷 ContractorBanner

Description

The assets are attached, just upload them to the app banner and double check the sizing to make sure it's not stretching or skewing. take a look at the dimensions they are recommending and let me know. Just leave a comment and I'll attach an updated asset matching the spec. If you have any q... See more

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🔗 Add a dependency

📋 Add a subtask

2 comments

Add a comment

×

3

👁🔖⋮

In progress50% complete

Upload banner image to the Annual Sales Conference mobile app

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10/12/201910/24/2019

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Description

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📎 2 attachments

📎 Mobile banner_large.png
Added Sep 24 at 9:56am

📎 Mobile banner_med.png
Added Sep 24 at 10:02a

🔗 Add a dependency

📋 Add a subtask

2 comments

👤 Kelly Puttick
@JamiePardo I tested the large image and it looks great! Going to call this task done.
Just now

👤 Chad Hastings
@KellyPuttick Sounds good!
Just now

Activity

👤 Audrey Sullivan
Created this task
10:06a

Add a comment

Interaction guidelines

PROJECT: Tasks: Low complexity object

DATE: 10/7/2019

AUTHOR: Mark Iris

SCREEN

Task: Panel States

- 1

EMPTY STATE

The empty state of a new task.
- 2

POPULATED, 1024PX

A task that is fully populated, cut to 1024px hieght. Panel content scrolls beneath the bottom bar.
- 3

POPULATED, FULL HEIGHT

A task with all field sections populated, content in all sections, and all section headers expanded.
- 4

DEPENDENCIES & SUBTASKS

For this concept, I've skipped Dependencies and Subtasks since that functionality does not yet exist.

1

2

X

👁️🔖⋮

Not started

Give your task a title

Link to a project or session

👤 Assignee

📅 Start / Due date

📈 Priority

🏷️ Tags

Description

Add some helpful details to your task

📎 Attach a file

🔗 Add a dependency

📁 Add a subtask

3

Create Task

X

👁️🔖⋮

4

Not started

Give your task a title

Link to a project or session

👤 Assignee

📅 Start / Due date

📈 Priority

🏷️ Tags

Description

Add some helpful details to your task

📎 Attach a file

🔗 Add a dependency

📁 Add a subtask

4

Duplicate

Delete

Create Task

X

👁️🔖⋮

Not started

5

Give your task a title

🔗

✎

Link to a project or session

👤 Assignee

📅 Start / Due date

📈 Priority

🏷️ Tags

Description

Add some helpful details to your task

📎 Attach a file

🔗 Add a dependency

📁 Add a subtask

Create Task

X

👁️🔖⋮

Not started

6

Give your task a title

Link to a project or session

👤 Assignee

📅 Start / Due date

📈 Priority

🏷️ Tags

Description

Add some helpful details to your task

📎 Attach a file

🔗 Add a dependency

📁 Add a subtask

Create Task

X

👁️🔖⋮

Not started

7

Upload banner imag|

Link to a project or session

👤 Assignee

📅 Start / Due date

📈 Priority

🏷️ Tags

Description

Add some helpful details to your task

📎 Attach a file

🔗 Add a dependency

📁 Add a subtask

Create Task

8

Delete task?

Closing the panel before clicking "Create Task" will delete any content you've added to it.

Cancel

Yes, Delete

Your task has been deleted

×

Upload Banner imag

Undo

9

X

👁️🔖⋮

Not started

10

Upload banner image to the Annual Sales Conference mobile app|

Link to a project or session

👤 Assignee

📅 Start / Due date

📈 Priority

🏷️ Tags

Description

Add some helpful details to your task

📎 Attach a file

🔗 Add a dependency

📁 Add a subtask

Create Task

X

👁️🔖⋮

Not started

11

Upload banner image to the Annual Sales Conference mobile app

Link to a project or session

👤 Assignee

📅 Start / Due date

📈 Priority

🏷️ Tags

Description

Add some helpful details to your task

📎 Attach a file

🔗 Add a dependency

📁 Add a subtask

Create Task

X

👁️🔖⋮

Not started

12

Upload banner image to the Annual Sales Conference mobile app

✎

Link to a project or session

👤 Assignee

📅 Start / Due date

📈 Priority

🏷️ Tags

Description

Add some helpful details to your task

📎 Attach a file

🔗 Add a dependency

📁 Add a subtask

Create Task

X

👁️🔖⋮

Not started

13

Upload banner image to the Annual Sales Conference mobile app|

Link to a project or session

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Add some helpful details to your task

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Create Task

Interaction guidelines

PROJECT: Tasks: Low complexity object
DATE: 10/7/2019
AUTHOR: Mark Iris

SCREEN

Task: Title

- 1

TASK PANEL

To maintain context, a user creates a new task inside of a panel that slides in from the right edge of the screen, over the global header.

The empty state of the task panel maintains the same form as the fully populated task panel, allowing the user to enter any details they have for that record inline.
- 2

CLOSE BEFORE SAVING

When the task is empty, closing the task panel, by clicking X button, the "esc" key, or clicking outside of panel, will close the panel without showing any confirmation message.
- 3

CREATE BUTTON

The "Create Task" button is inactive until a character is entered into the title field.
- 4

PANEL ACTIONS

Watch button can be clicked, subscribing you to notifications & alerts.

Click the bookmark button to add this task to your bookmarks.

The Options Menu appears when the user clicks the Options icon. Options that are not possible before the task is created will be inactive.
- 5

HOVER STATE

Hover over the Title field to show its hover state. click anywhere in the field, or the pencil icon to activate the field.

The cursor appears as an "I-beam" over the text area, and as a "hand-pointing" when hovering over the pencil icon.
- 6

ACTIVATING THE FIELD

When the field is active, the cursor will appear on the left side of it. Hint text still visible until a character is entered into the field.
- 7

ENTERING A CHARACTER

Once a character is inserted, the Create Task button becomes active.

Once Create Task button is active, closing the task panel by clicking X button, the "esc" key, or clicking outside of panel, will prompt a confirmation dialog.
- 8

DELETE BEFORE SAVE

When the "Create Task" button is active, clicking the "X" button in the upper left of the panel will prompt the "Delete task" dialog.
- 9

UNDO

Confirming the delete action will display a temporary notification that allows you a limited time to undo the action.
- 10

LINE WRAPPING

When your title reaches the end of the line, it will wrap pushing all subsequent panel content down to accommodate.
- 11

SUBMIT TITLE

Clicking anywhere in the panel outside of the active field commits the title to the record and closes the field.

The "Return" key will also submit your title and close the field.
- 12

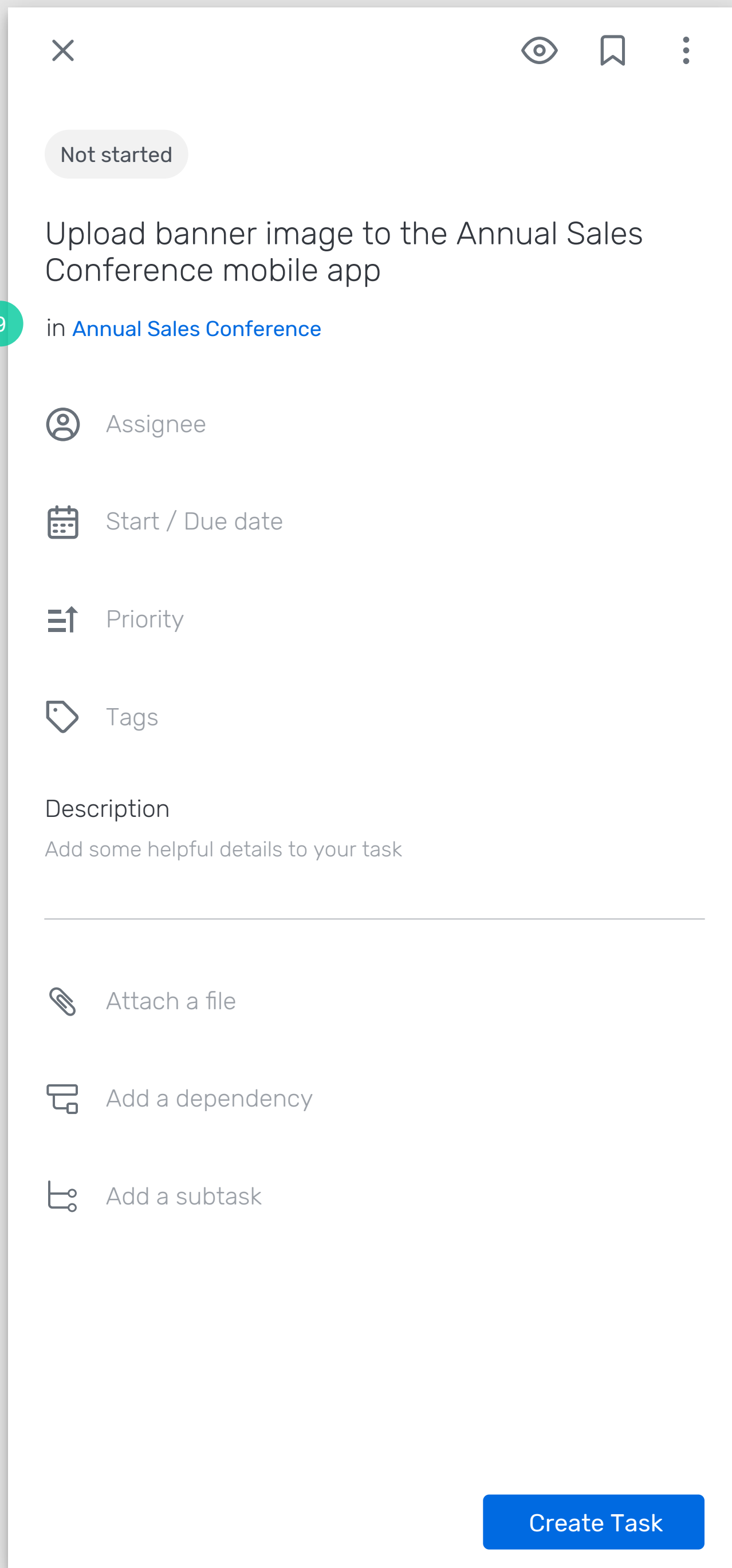
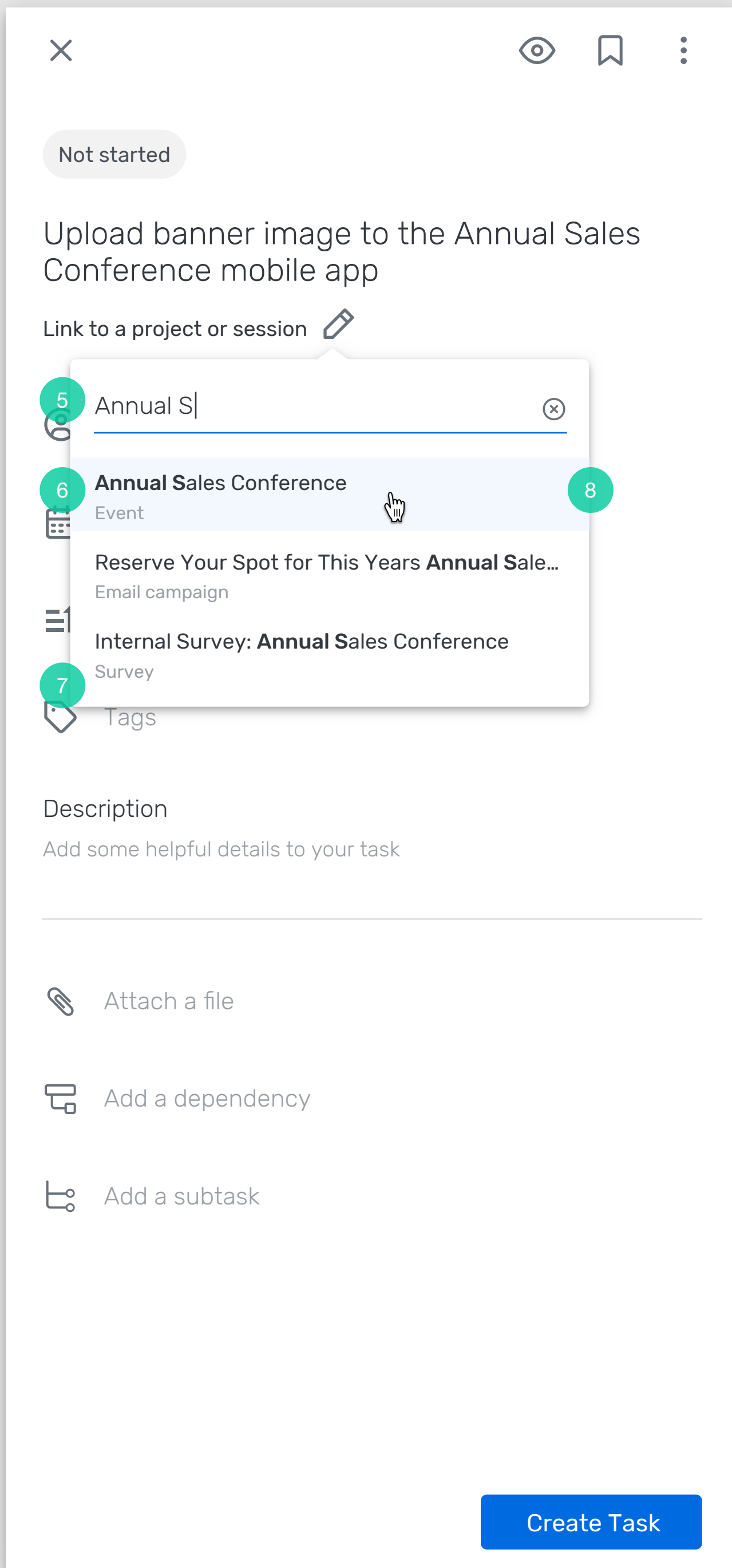
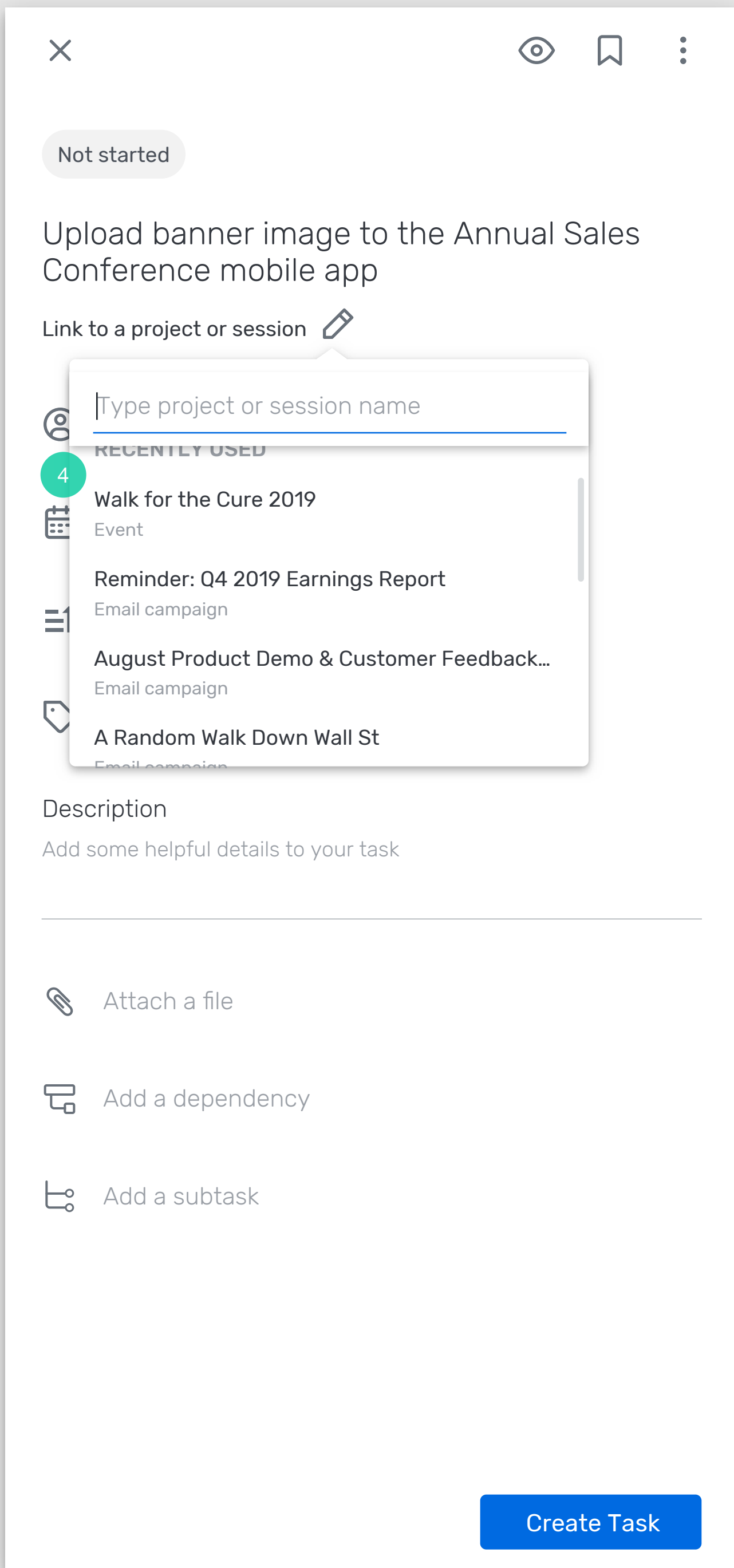
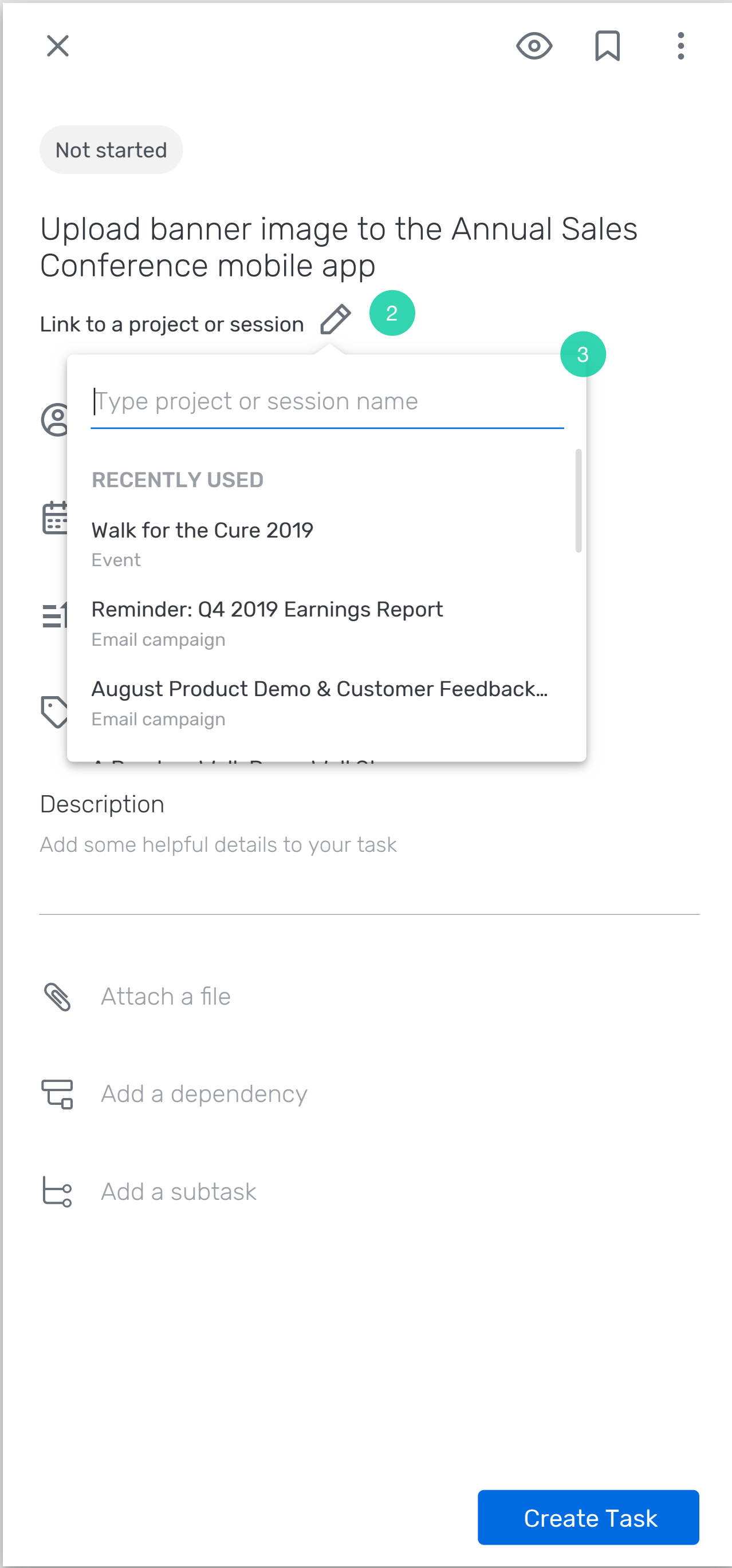
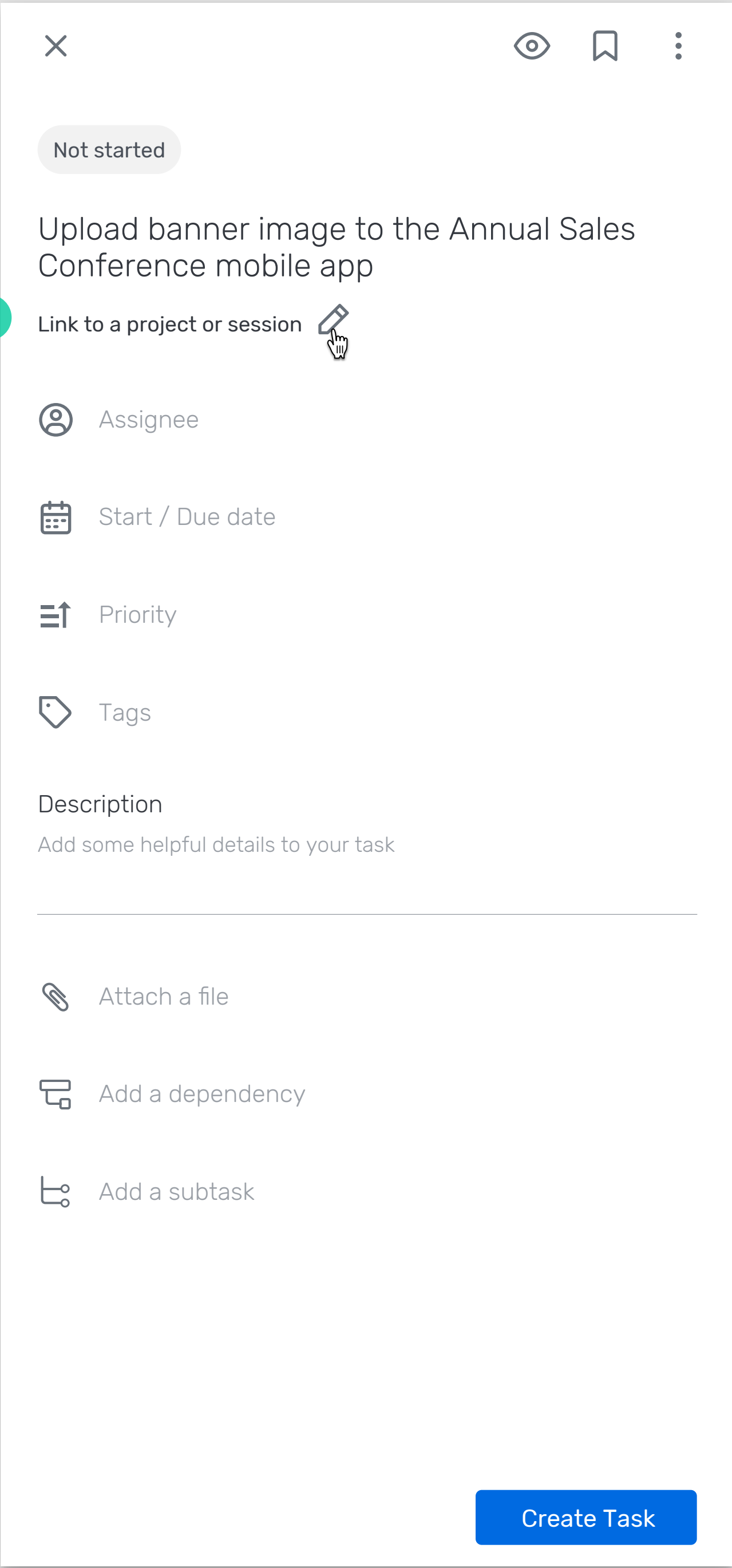
EDIT TITLE

After the title is submitted to the record, you must click the pencil icon to edit the field.

Hovering over the field will show a subtle highlight over the field with a pencil icon, indicating that you can edit the contents of the field.
- 13

REACTIVATING FIELD

When the field becomes active, the cursor appears at the end of the text that was entered.



Interaction guidelines

PROJECT: Tasks: Low complexity object
DATE: 10/7/2019
AUTHOR: Mark Iris

SCREEN

Task: Link to project or session

1 HOVER STATE
When you hover over the "Link to a project or session" button, the text appears in its hover state and a pencil icon appears to the right of it.

2 ACTIVATE SECTION
Clicking the pencil icon triggers a popover allowing you to find a project/session to link your task to.

3 PROJECT POPOVER
The popover contains a function to search for a project or session, and the 5 most recently used projects/sessions. The Search field is active and the cursor appears there allowing you to begin typing immediately.

4 SCROLLABLE CONTENT
The recent projects/sessions list is scrollable, and will scroll beneath the search field.

5 CLEAR FIELD
As soon a character is entered, the "X" button appears on the right side of the field. Clicking the "X" will clear the field.

6 SEARCHING IN POPOVER
Recently Used projects will remain in the popover until search suggestions appear.

Projects and Sessions can both be searched. The resulting items may match any part of the name or label. The matching characters in the name will be bold.

7 DYNAMIC SIZING
The popover is dynamic in size and its height will decrease to fit the result set, if the result set is smaller than its original height.

8 SELECTING AN ITEM
Clicking one of these suggestions will link your task to it. If you continue typing until only one suggestion remains, then hit the "Return" key, that project will be selected and the task will be linked to it.

9 TASK IS LINKED
The task is now linked to the selected project. The project/session link is preceded by "in," for readability.

10 EDIT OR DELETE LINK
After a project has been linked, you can update or remove the link. To do so, hover over the link. A pencil icon will appear to the right of the link. Click the pencil icon to trigger the project finder popover.

Note: After the task is created, clicking the link (not the pencil) will navigate you to that project. This functionality should be blocked while creating, in order to maintain focus on the workflow.

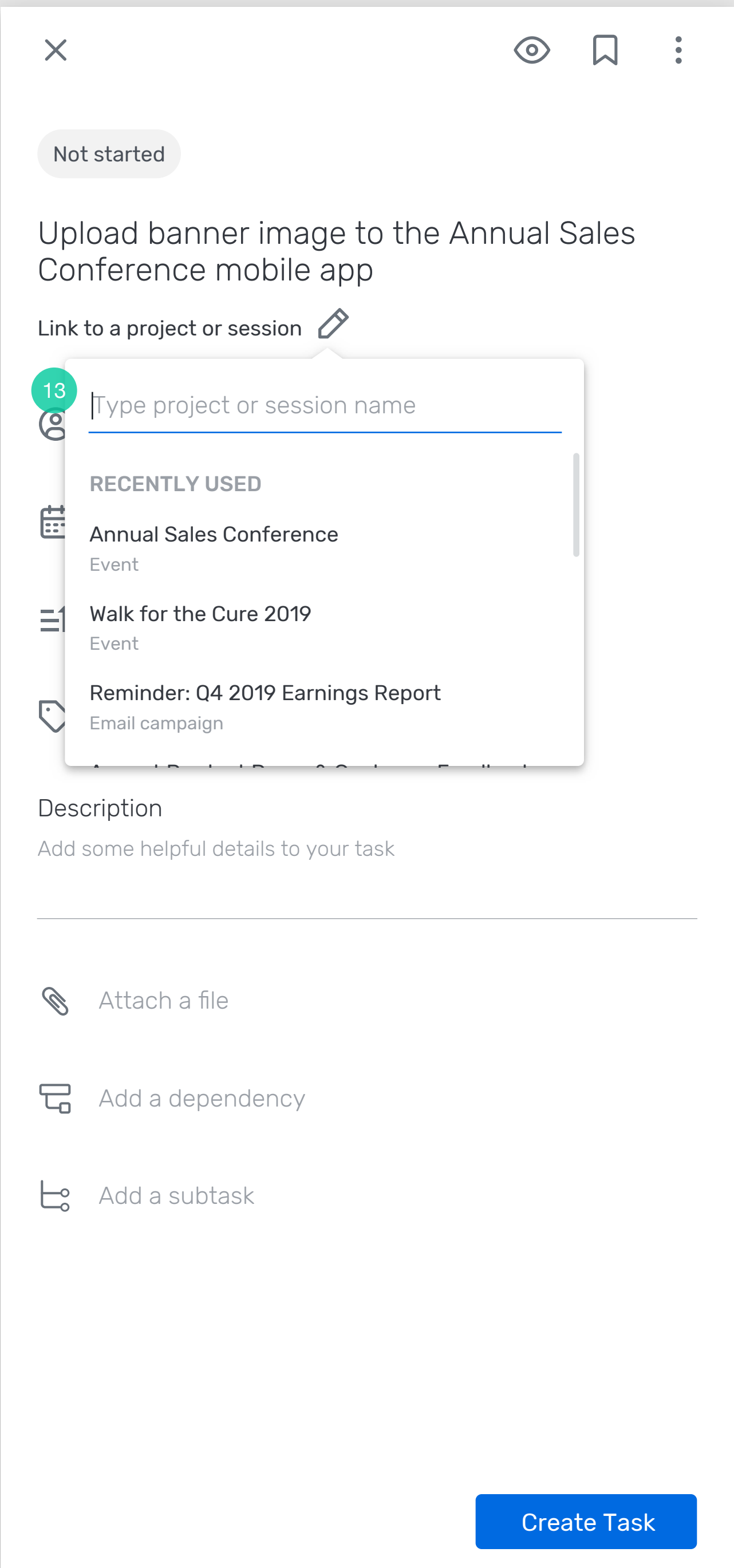
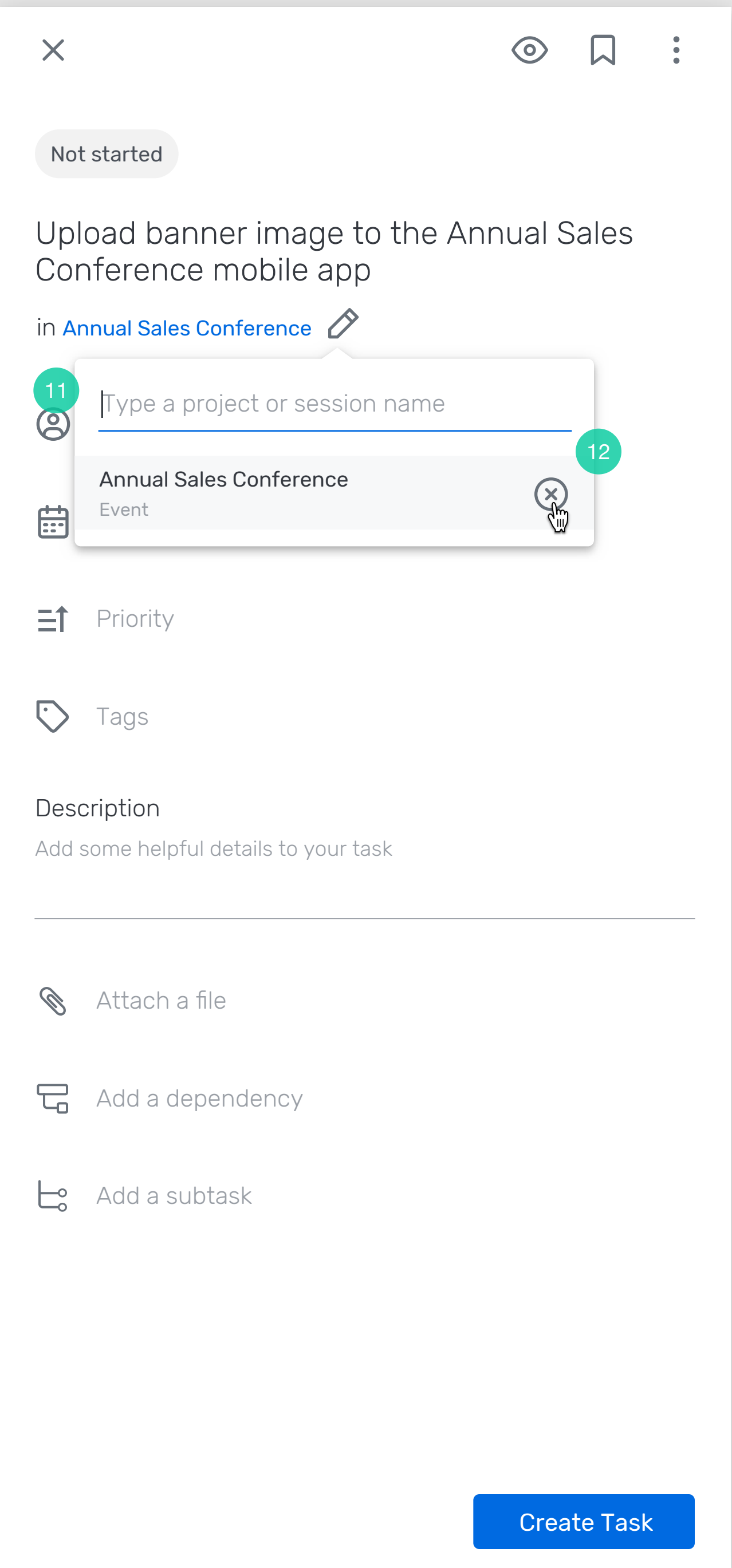
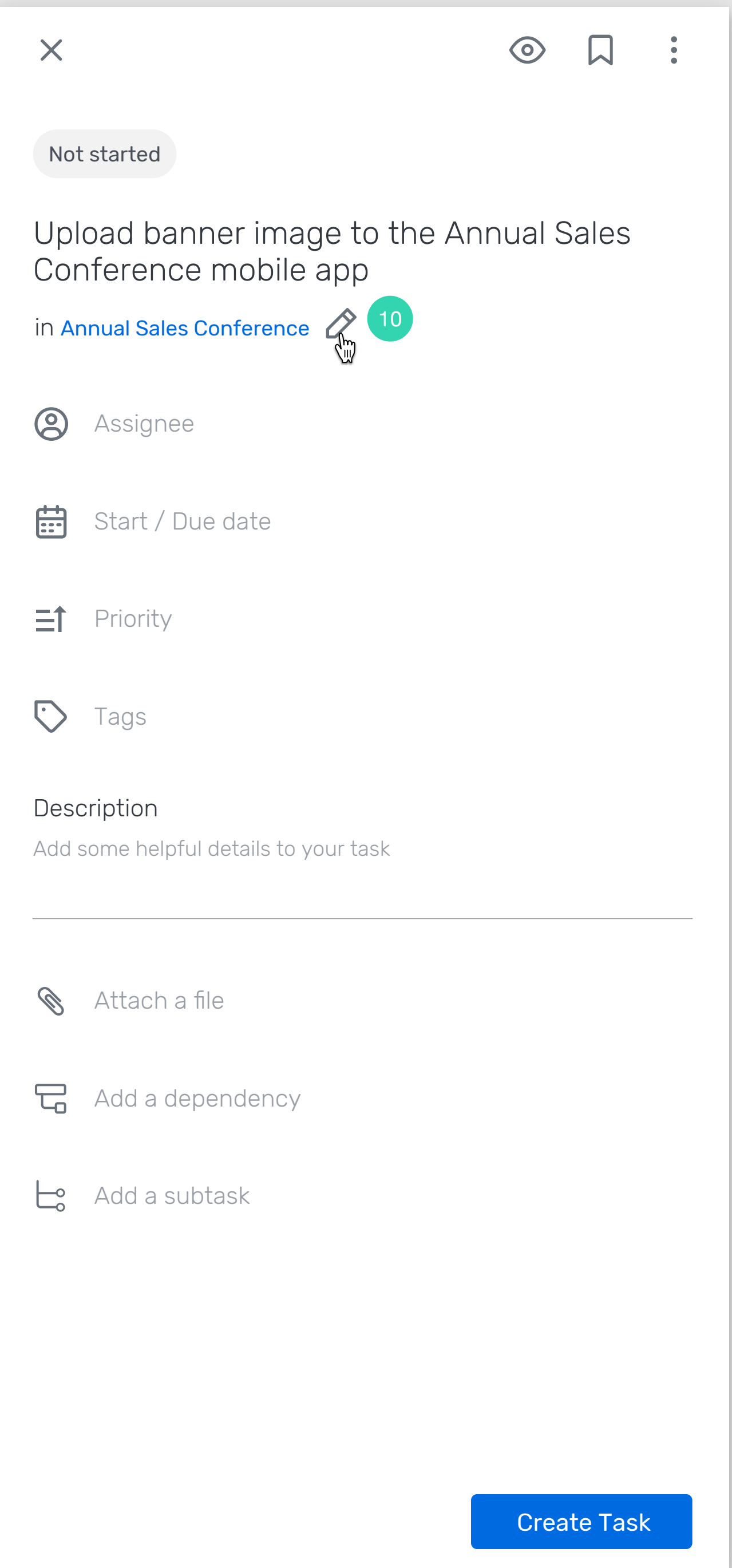
11 PROJECT POPOVER
When the popover appears, it will allow you to overwrite or remove the current link. The field will be active, and hint text will be visible.

12 REMOVE OR REPLACE LINK
Click the "X" next to the currently selected project/session to remove it. You can also begin searching for a new project/session to overwrite the current selection.

13 LINK REMOVED
The link has been removed and the search field and link signifier both return to their default state.

Recently used suggestions appear again, including the one you most recently added.

Click or tab outside of the popover to close it, returning the section to its default state.



Not started

Upload banner image to the Annual Sales Conference mobile app

in Annual Sales Conference

Assignee

Start / Due date

Priority

Tags

Description

Add some helpful details to your task

Attach a file

Add a dependency

Add a subtask

Create Task

Not started

Upload banner image to the Annual Sales Conference mobile app

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Tags

Description

Add some helpful details to your task

Attach a file

Add a dependency

Add a subtask

Create Task

Interaction guidelines

PROJECT: Tasks: Low complexity object
DATE: 10/7/2019
AUTHOR: Mark Iris

SCREEN

Task: Assignee

- 1

HOVER STATE
Hover over the Assignee field to show its hover state. Click the pencil icon to trigger the Assignee popover.
- 2

ASSIGNEE POPOVER
The Assignee popover appears originating from the Pencil icon.
- 3

POPOVER CONTENT
As before, cursor is active in the search field and the list content can scroll beneath the search bar.

The first suggestion is always the current user, followed by a recents section displaying the 5 most recently used people or teams.
- 4

SELECTING AN ITEM
Suggested contacts begin immediately after text is entered into the field and can include the current user.

For contacts, the name and email address can both be searched. The corresponding characters in the suggestions will be indicated with a heavier font.

Click any item in the list to assign the task to that person or team.
- 5

ASSIGNEE SELECTED
After selecting an assignee, the popover is dismissed and the person/team is added to the task.
- 6

EDIT OR REMOVE ASSIGNEE
To edit or remove the assignee, hover over that field. Click the pencil icon to trigger the assignee popover.
- 7

REMOVE OR REPLACE ASSIGNEE
When the popover appears, it will allow you to overwrite or remove the current assignee. The field will be active, and hint text will be visible.
Click the "X" next to the currently assignee to remove it.

You can also begin searching for a new assignee to overwrite the current selection.
- 8

ASSIGNEE REMOVED
The assignee has been removed. The Assignee field returns to its default state.
- 9

ADD ASSIGNEE AGAIN
Hover over the field and click the pencil icon again to add an assignee. The person most recently selected will appear at the top of the recents list.

Not started

Upload banner image to the Annual Sales Conference mobile app

in Annual Sales Conference

Assignee
Kelly Puttick

1

Start / Due date

Priority

Tags

Description
Add some helpful details to your task

Attach a file

Add a dependency

Add a subtask

Create Task

Not started

Upload banner image to the Annual Sales Conference mobile app

in Annual Sales Conference

Assignee
Kelly Puttick

2

Start date

Due date

3

Notify assignee

1 days before due

Priority

Tags

Description
Add some helpful details to your task

Attach a file

Add a dependency

Add a subtask

Create Task

Not started

Upload banner image to the Annual Sales Conference mobile app

in Annual Sales Conference

Assignee
Kelly Puttick

4

Start date
MM/DD/YYYY

Due date

Priority

Tags

Description
Add some helpful details to your task

Attach a file

Add a dependency

Add a subtask

Create Task

Not started

Upload banner image to the Annual Sales Conference mobile app

in Annual Sales Conference

Assignee
Kelly Puttick

5

Start date
MM/DD/YYYY

Due date

Priority

Tags

Description
Add some helpful details to your task

Attach a file

Add a dependency

Add a subtask

Create Task

Not started

Upload banner image to the Annual Sales Conference mobile app

in Annual Sales Conference

Assignee
Kelly Puttick

6

Start date
10/12/2019

Due date

Priority

Tags

Description
Add some helpful details to your task

Attach a file

Add a dependency

Add a subtask

Create Task

Not started

Upload banner image to the Annual Sales Conference mobile app

in Annual Sales Conference

Assignee
Kelly Puttick

7

Start date
10/12/2019

Due date

Priority

Tags

Description
Add some helpful details to your task

Attach a file

Add a dependency

Add a subtask

Create Task

Not started

Upload banner image to the Annual Sales Conference mobile app

in Annual Sales Conference

Assignee
Kelly Puttick

8

Start date
10/12/2019

Due date

Priority

Tags

Description
Add some helpful details to your task

Attach a file

Add a dependency

Add a subtask

Create Task

Not started

Upload banner image to the Annual Sales Conference mobile app

in Annual Sales Conference

Assignee
Kelly Puttick

9

Start date
10/12/2019

Due date
MM/DD/YYYY

Priority

Tags

Description
Add some helpful details to your task

Attach a file

Add a dependency

Add a subtask

Create Task

Not started

Upload banner image to the Annual Sales Conference mobile app

in Annual Sales Conference

Assignee
Kelly Puttick

10

Start date
10/12/2019

Due date
10/24/YYYY

Priority

Tags

Description
Add some helpful details to your task

Attach a file

Add a dependency

Add a subtask

Create Task

Not started

Upload banner image to the Annual Sales Conference mobile app

in Annual Sales Conference

Assignee
Kelly Puttick

11

Start date
10/12/2019

Due date
10/24/2019

Priority

Tags

Description
Add some helpful details to your task

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Add a subtask

Create Task

Not started

Upload banner image to the Annual Sales Conference mobile app

in Annual Sales Conference

Assignee
Kelly Puttick

12

Start date
10/12/2019

Due date
10/24/2019

Priority

Tags

Description
Add some helpful details to your task

Attach a file

Add a dependency

Add a subtask

Create Task

Not started

Upload banner image to the Annual Sales Conference mobile app

in Annual Sales Conference

Assignee
Kelly Puttick

13

Start date
10/12/2019

Due date
10/24/2019

Priority

Tags

Description
Add some helpful details to your task

Attach a file

Add a dependency

Add a subtask

Create Task

Not started

Upload banner image to the Annual Sales Conference mobile app

in Annual Sales Conference

Assignee
Kelly Puttick

14

Start date
10/12/2019

Due date
10/24/2019

Priority

Tags

Description
Add some helpful details to your task

Attach a file

Add a dependency

Add a subtask

Create Task

Not started

Upload banner image to the Annual Sales Conference mobile app

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Assignee
Kelly Puttick

15

Start date
10/12/2019

Due date
10/24/2019

Priority

Tags

Description
Add some helpful details to your task

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Add a dependency

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Create Task

Not started

Upload banner image to the Annual Sales Conference mobile app

in Annual Sales Conference

Assignee
Kelly Puttick

16

Start date
10/12/2019

Due date
10/24/2019

Priority

Tags

Description
Add some helpful details to your task

Attach a file

Add a dependency

Add a subtask

Create Task

Not started

Upload banner image to the Annual Sales Conference mobile app

in Annual Sales Conference

Assignee
Kelly Puttick

17

Start date
10/12/2019

Due date
10/24/2019

Priority

Tags

Description
Add some helpful details to your task

Attach a file

Add a dependency

Add a subtask

Create Task

Not started

Upload banner image to the Annual Sales Conference mobile app

in Annual Sales Conference

Assignee
Kelly Puttick

18

Start date
10/12/2019

Due date
10/24/2019

Priority

Tags

Description
Add some helpful details to your task

Attach a file

Add a dependency

Add a subtask

Create Task

Interaction guidelines

PROJECT: Tasks: Low complexity object
DATE: 10/7/2019
AUTHOR: Mark Ihs

Overview

Task: Dates

- HOVER STATE**
Hover over the Date field to show its hover state. Click the pencil icon to make the Date section editable.
- ACTIVATE SECTION**
Clicking the Pencil icon reveals the Start date and Due date fields, as well as a notification setting. Subsequent panel content slides down to accommodate.

The fields are in their Active-Unfocused (empty) state, so hovering over them displays an "I-beam" cursor. Just click to focus the field.
- DEFAULT NOTIFICATION SETTINGS**
By default, the notification checkbox will be selected, and the value=1. It will not have any effect until a due date is selected.
- FOCUSED FIELD**
The Start date field is focused and the Date Picker is triggered, animating down from the field. The cursor is placed at the left edge of the field, and the hint text remains visible.
- DATE PICKER**
The Date Picker component can be used to select a start/due date. Just click a date to add it to the field.
- SETTING START DATE**
After clicking a date, Date Picker disappears. The field returns to its Active-Unfocused (populated) state.

If I click on any other field or option outside of this section, the date section will close, committing my entry.
- SETTING START DATE**
By clicking outside of the active Date section, my entry will be submitted. In this case, the user has only selected a start date.
- ADD OR EDIT DATE**
Hover over the Date field to show the Pencil icon. Clicking the pencil will open the date section, without focusing either field, as before.
- DUE DATE**
Clicking into the "Due date" field follows the same pattern as "Start date," activating the field, placing the cursor, and triggering the Date Picker.
- TYPING DATE INTO FIELD**
I can also type directly into the field. The hint text should remain as I fill in the date, informing me of the format that the field requires.

Forward slashes should be entered automatically to reduce errors. If a user enters a forward slash on their keyboard, it can be ignored.

The Date Picker will remain in its default state until a complete date is entered into the field.
- TYPING FULL DATE**
As soon as the complete date is entered, the Date Picker will progress to it, highlighting it as the selected state.

Hitting the Return key, or clicking outside of the field will dismiss the Date Picker and commit the entered date.
- MONTH DROPDOWN**
An addition to the date picker component - Hover over the month/year to show dropdown controls. Click it to see a list of future months.
- MONTH DROPDOWN SELECTED**
The currently selected month will be highlighted as "selected." Choose a different month to progress the calendar.
- NOTIFICATIONS**
Deselect the checkbox to turn off notifications for this task. The cursor will turn into an "I-beam" when you hover over the "a days" field.
- DAYS FIELD**
Clicking the field will activate it, selecting the contents of the field. Enter any number into the field with your keypad. Only numbers can be entered into the field.

Clicking anywhere outside of this section will close it, submitting your entry.
- DATES SUBMITTED**
The Date section is closed, and your selections are added to the task.
- EDITING DATES**
Hover over the Date fields to show a pencil icon. Click the pencil icon to reopen the section.
- ACTIVATING A POPULATED FIELD**
Clicking into a field with a date already populated will highlight all the text in the field, allowing you to immediately type over it.

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Not started

Upload banner image to the Annual Sales Conference mobile app

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Assignee

Kelly Puttick

Start date

Due date

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Priority

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Tags

Description

Add some helpful details to your task

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Attach a file

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Add a dependency

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Add a subtask

Create Task

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Not started

Upload banner image to the Annual Sales Conference mobile app

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Assignee

Kelly Puttick

Start date

Due date

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Tags

Description

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Add a subtask

Create Task

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Not started

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Assignee

Kelly Puttick

Start date

Due date

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Priority

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Tags

Description

Add some helpful details to your task

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Attach a file

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Add a subtask

Create Task

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Not started

Upload banner image to the Annual Sales Conference mobile app

in [Annual Sales Conference](#)

Assignee

Kelly Puttick

Start date

Due date

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Priority

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Tags

Description

Add some helpful details to your task

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Attach a file

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Add a dependency

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Add a subtask

Create Task

Interaction guidelines

PROJECT: Tasks: Low complexity object

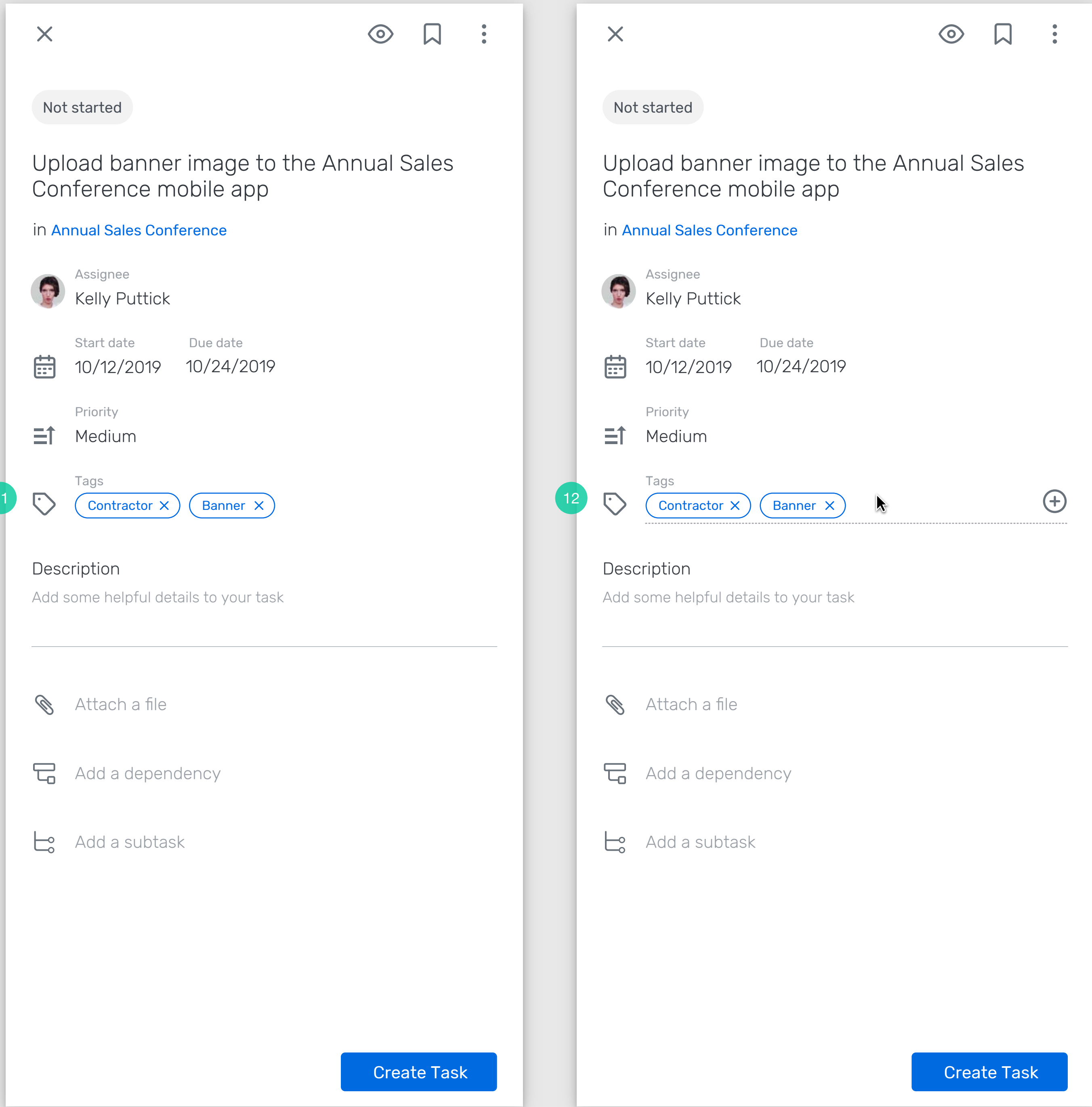
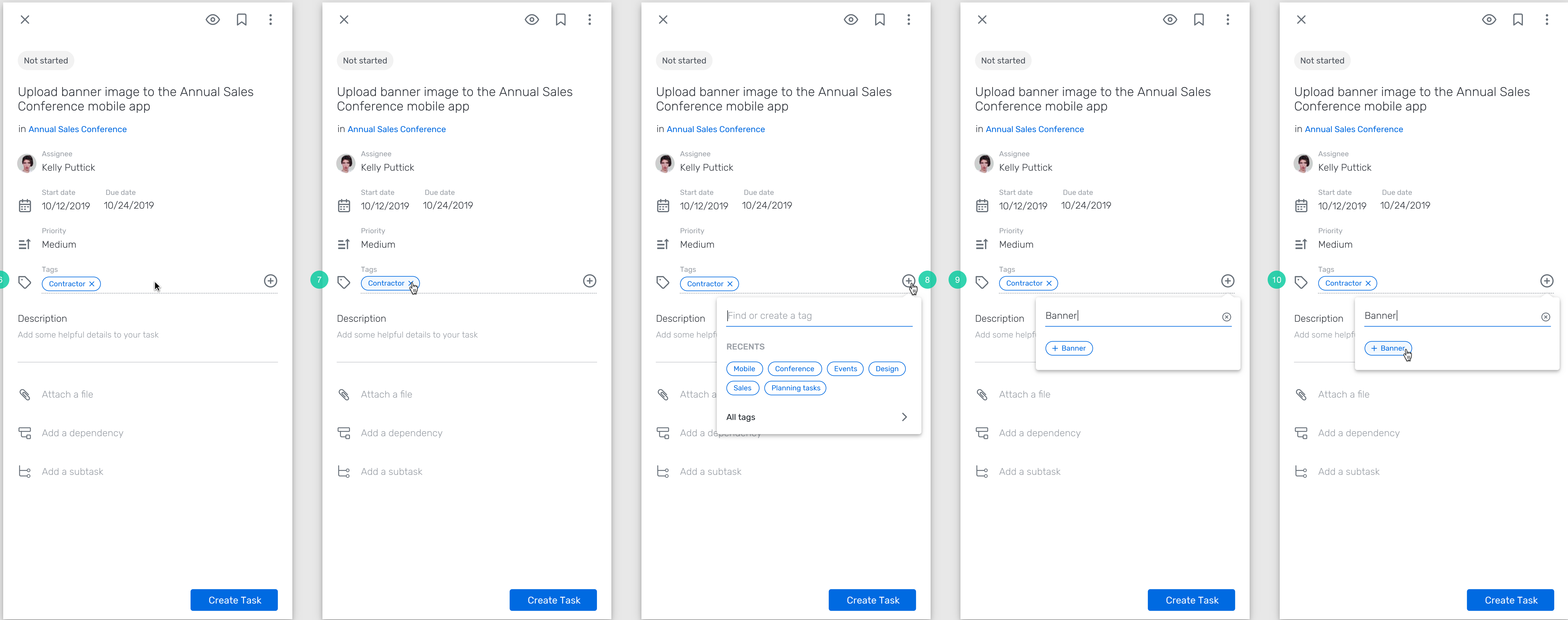
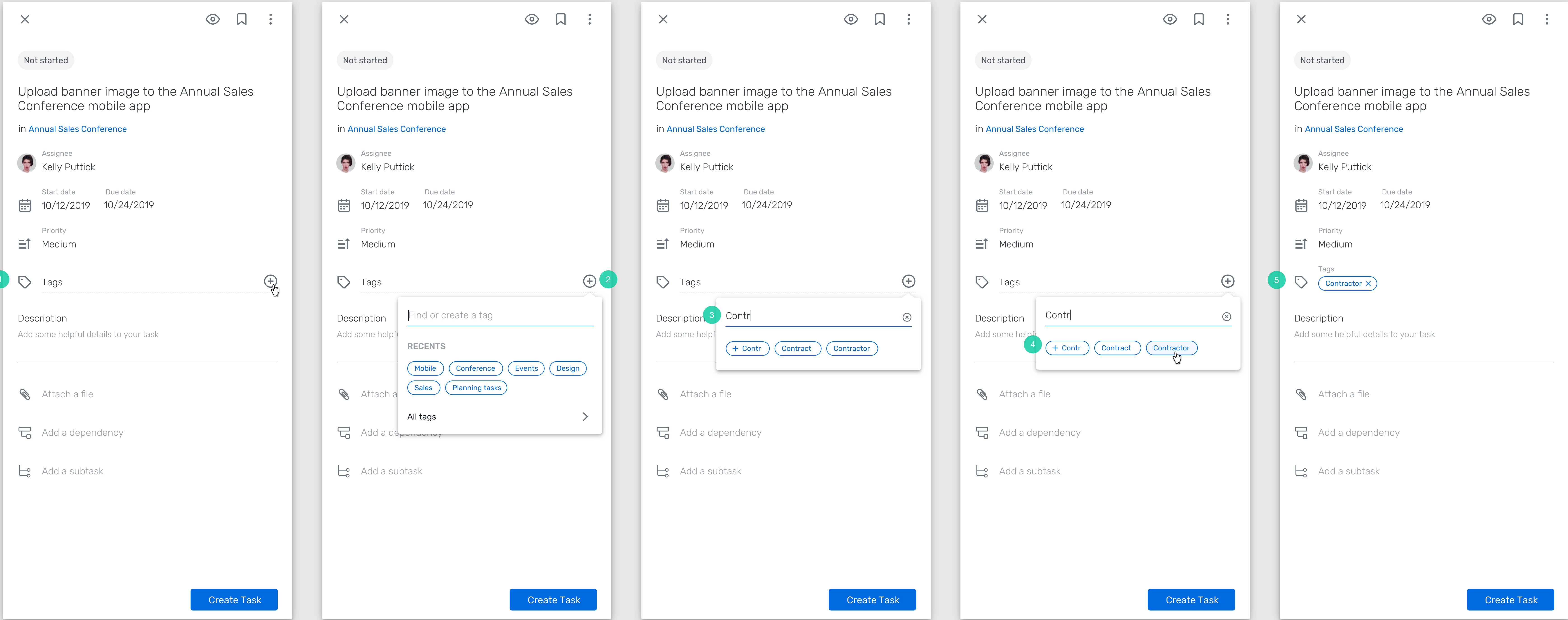
DATE: 10/7/2019

AUTHOR: Mark Iris

SCREEN

Task: Priority

- 1 HOVER STATE**
Hovering over the Priority field will display its dropdown control.
- 2 OPEN DROPDOWN**
Clicking the the dropdown to open it. The current selection (None) is highlighted. The current open that the cursor is hovering over shows the hover state.
- 3 PRIORITY SET**
After selecting an option, the dropdown closes and your selection is displayed in the Priority field.
- 4 CHANGING PRIORITY**
To change the priority, hover over it, and and click to open the dropdown.



Interaction guidelines

PROJECT: Tasks: Low complexity object
DATE: 10/7/2019
AUTHOR: Mark Iris

SCREEN

Task: Tags

- 1 HOVER STATE**
On hover, a "+" icon appears to the right of the Tags field. Clicking either will activate the popover.
- 2 TAG POPOVER**
Just as the Tag popover appears originating from the "+" button. As before, the search field contains hint text and cursor is active. The list content can scroll beneath the search bar if needed.

Recently used tags will appear beneath the field, along with a link to browse all tags.

You can browse all tags by navigating sub-menus, following the patterns described in our Combo Box component here.
- 3 SEARCH FOR A TAG**
When a character is entered into the input field, it replaces the helper text. As you type characters into the field, an "Add tag" option is displayed (" + text ").

Matching tags will be displayed as you enter characters in place of the recently used tags. Search should work for any part of a tag's name.

The matches are displayed in order of match accuracy.
- 4 SELECTING A TAG**
Hovering over any tag will display its hover state. Click to select.
- 5 TAG SELECTED**
After a tag is selected, the popover is dismissed and the tag is displayed in the field.
- 6 HOVER STATE**
Hovering your cursor over the Tags field will display the "+" icon, allowing you to add another tag.
- 7 REMOVING A TAG**
Hover over a tag to show its hover state. Click the "X" in the tag to remove it, returning the field to its default, empty state.
- 8 ADDING ANOTHER TAG**
Click the "+" icon to trigger the popover to add another tag.
- 9 NEW TAG**
If the field text does not match any existing tags you will only see the option to add a new tag comprised of the text in the field.
- 10 ADD NEW TAG**
Click the new tag to add it to your task. The new tag will also be added to your tag library associated with the account.
- 11 SECOND TAG ADDED**
The popover is dismissed and the new tag is displayed next to the previous one.
- 12 LINE WRAPPING**
Hover over the Tag field again to display the "+" icon again. If many tags are added, they may appear on multiple lines, pushing the lower panel content down to accommodate. They will wrap before they reach the "+" icon.

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Not started

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Assignee

Kelly Puttick

Start date

Due date

10/12/2019

10/24/2019

Priority

Medium

📎

Contractor X

Banner X

Description

Add some helpful details to your task

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Attach a file

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Add a dependency

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Add a subtask

Create Task

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Kelly Puttick

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10/24/2019

Priority

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Contractor X

Banner X

Description

The assets are attached, just upload them to the app banner and double check the sizing to make sure it's not stretching or skewing.

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Attach a file

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Create Task

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Assignee

Kelly Puttick

Start date

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10/12/2019

10/24/2019

Priority

Medium

📎

Contractor X

Banner X

Description

The assets are attached, just upload them to the app banner and double check the sizing to make sure it's not stretching or skewing. If the image is skewing, take a look at the dimensions they are recommending and let me know. Just leave a comment and I'll attach an updated asset matching the spec.

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Attach a file

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Add a dependency

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Add a subtask

Create Task

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Contractor X

Banner X

Description

The assets are attached, just upload them to the app banner and double check the sizing to make sure it's not stretching or skewing. take a look at the dimensions they are recommending and let me know. Just leave a comment and I'll attach an updated asset matching the spec. If you have any questions, feel free to shoot me a message or an email. I'm out of office next week so I'll get to it as soon as I'm back! [See less](#)

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Attach a file

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Add a dependency

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Add a subtask

Create Task

Interaction guidelines

PROJECT: Tasks: Low complexity object
DATE: 10/7/2019
AUTHOR: Mark Iris

SCREEN

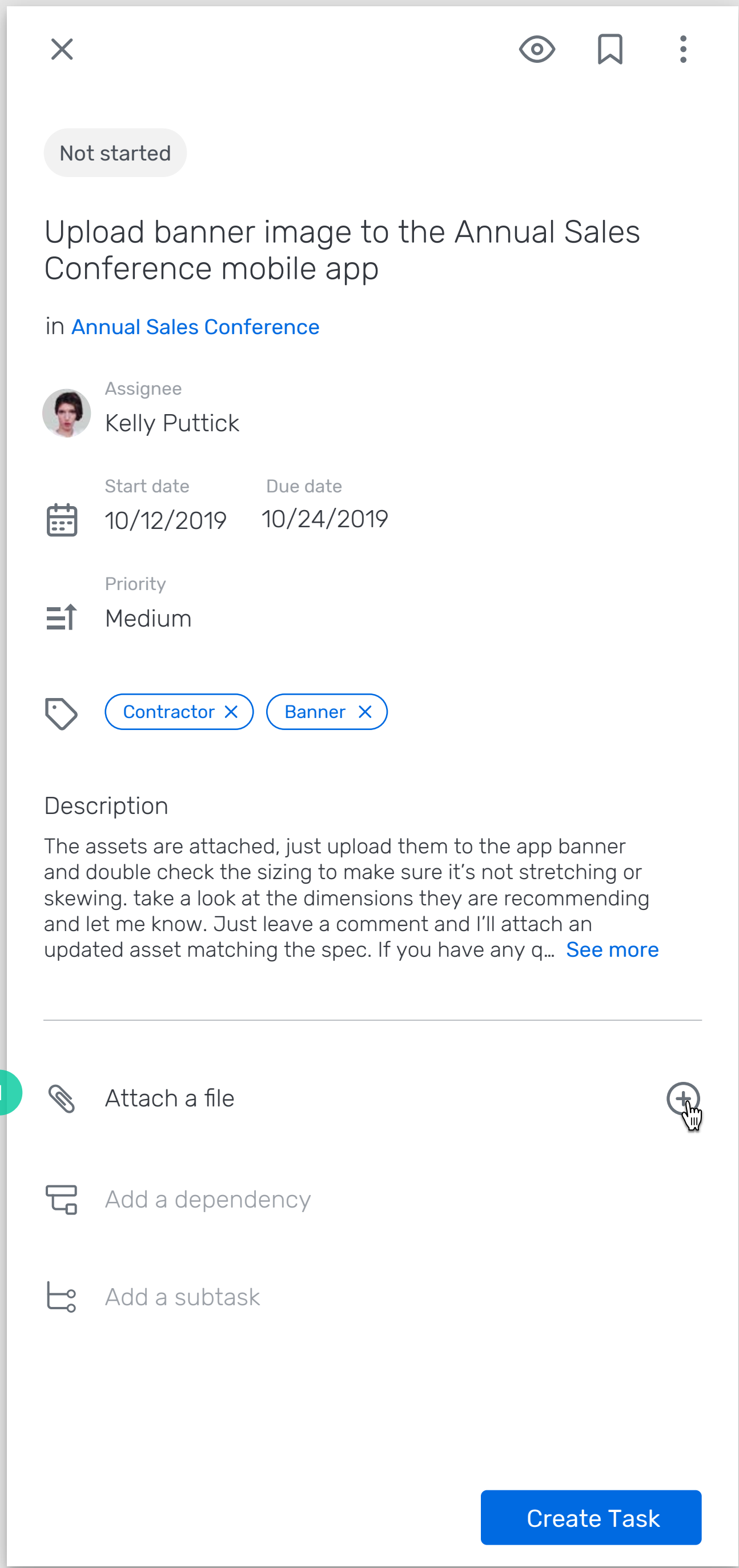
Task: Description

- HOVER STATE**
Hover over the Description field to show its hover state. Click the pencil icon to activate the field.
- ACTIVATED SECTION**
The Description field is activated. The cursor is placed at the beginning of the field, and the helper text remains until a character is entered.

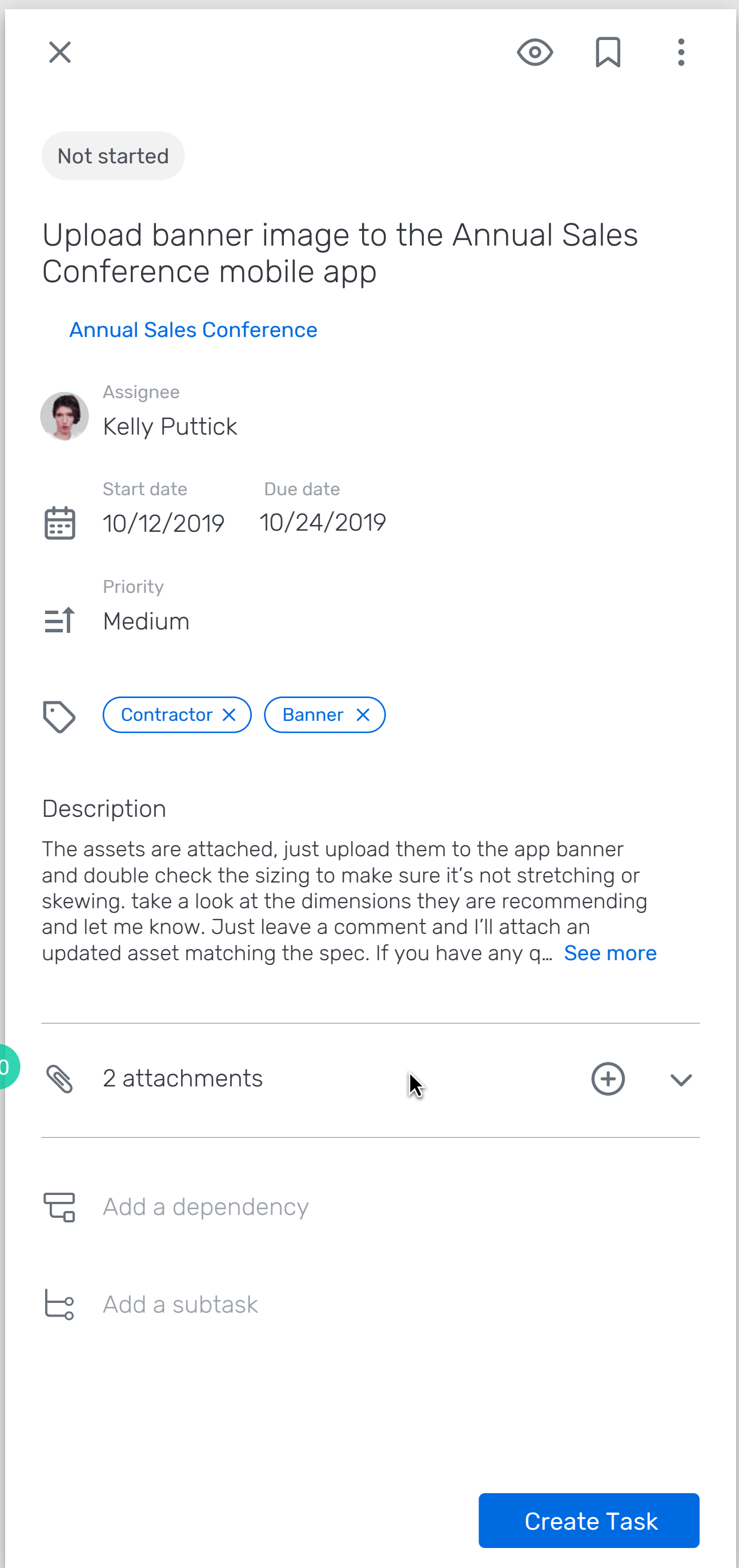
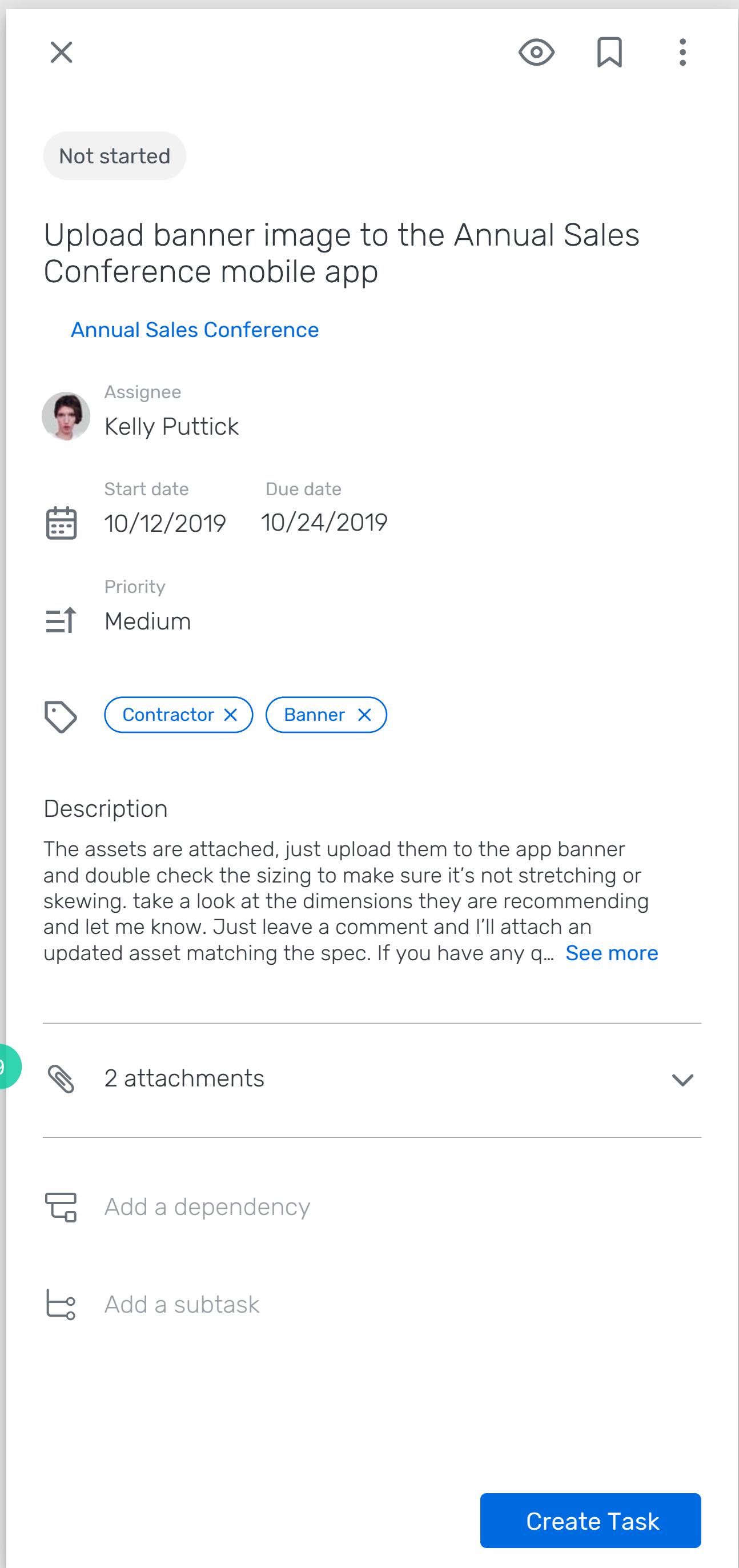
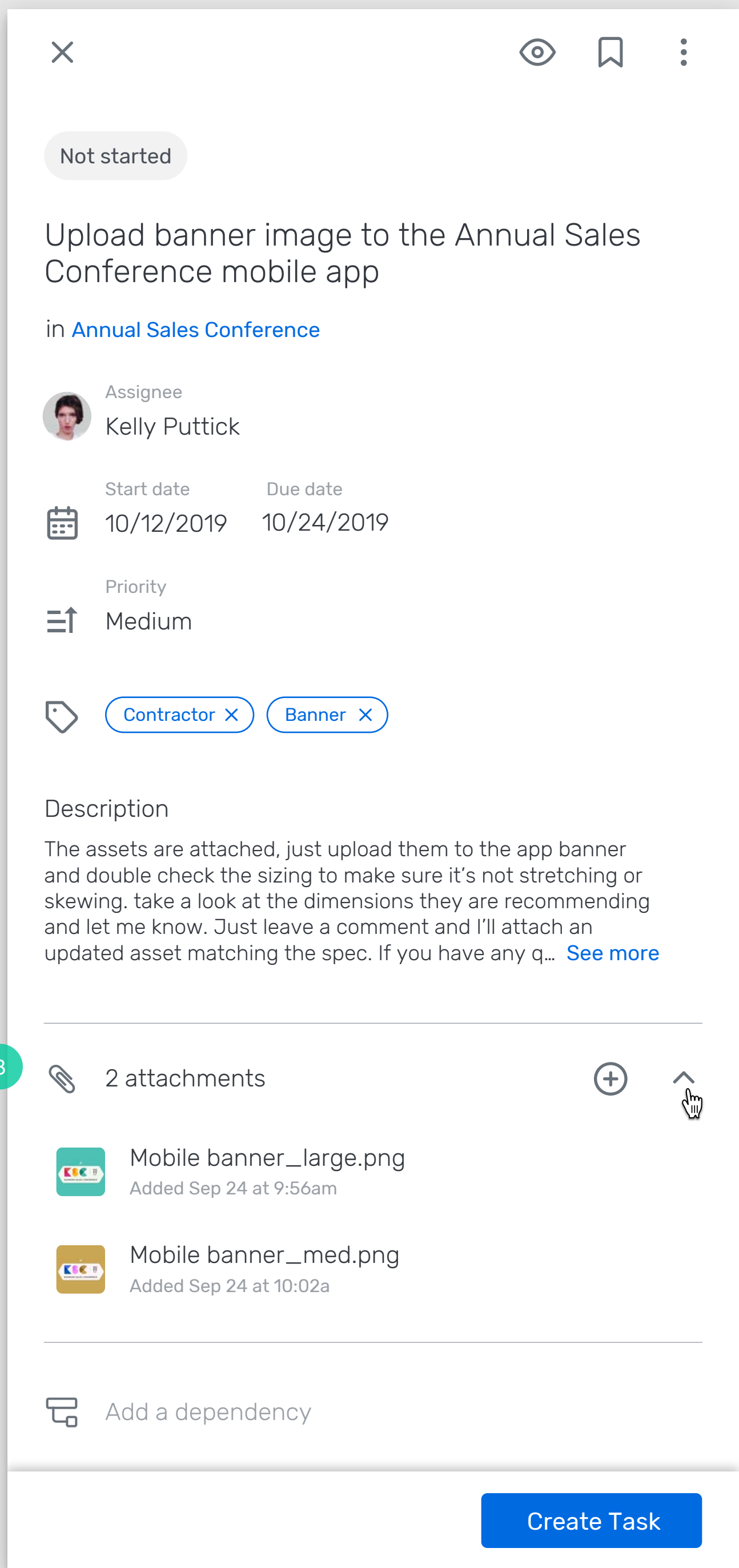
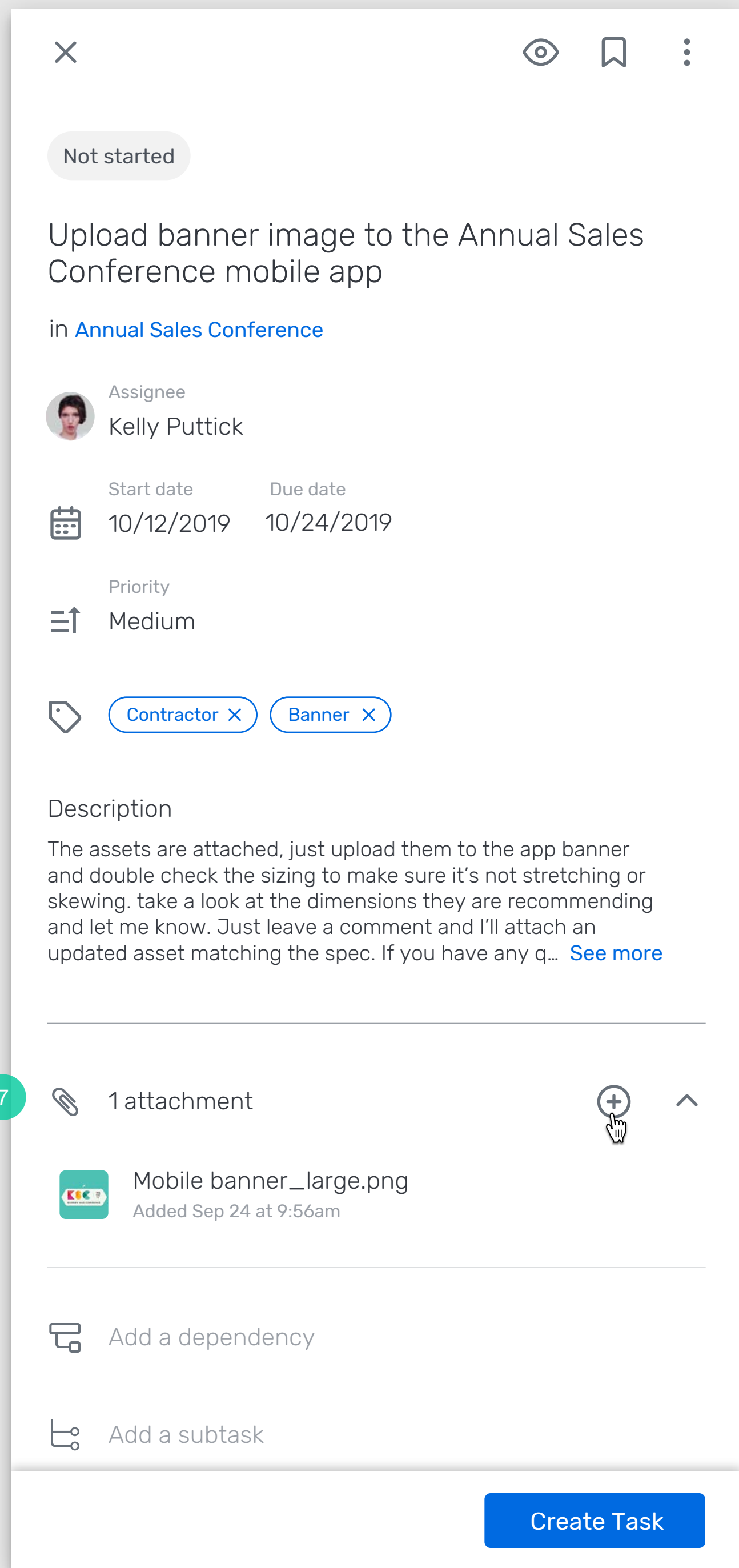
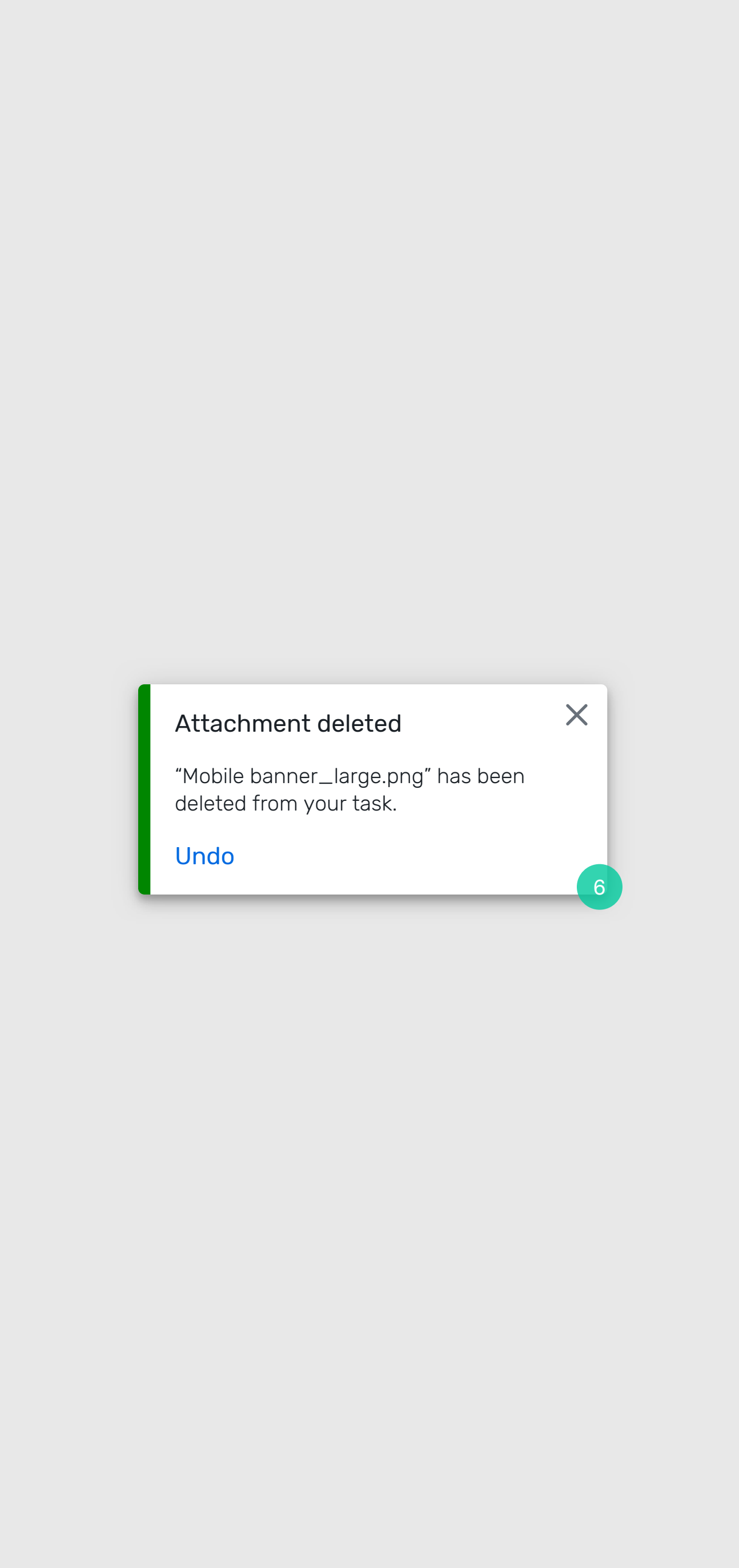
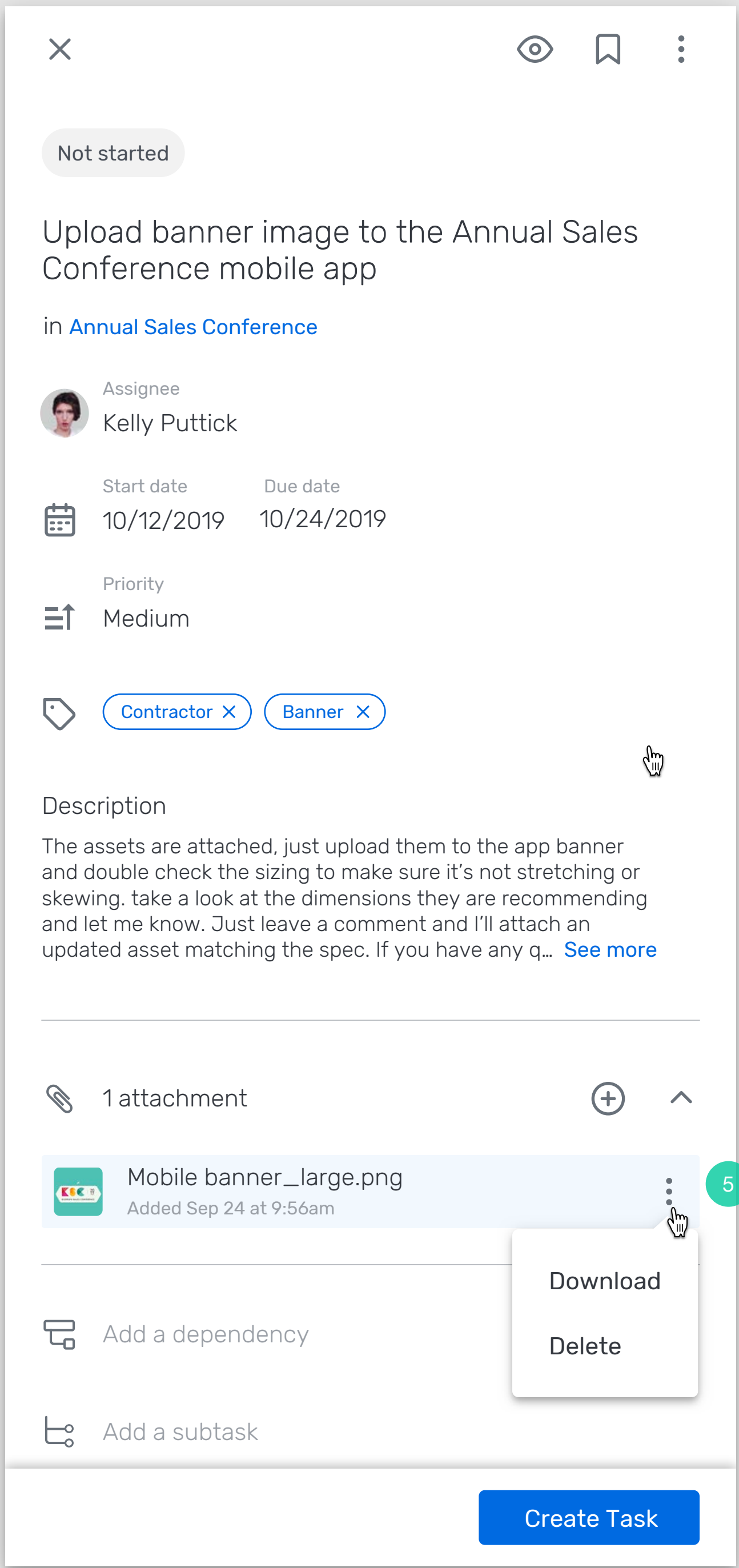
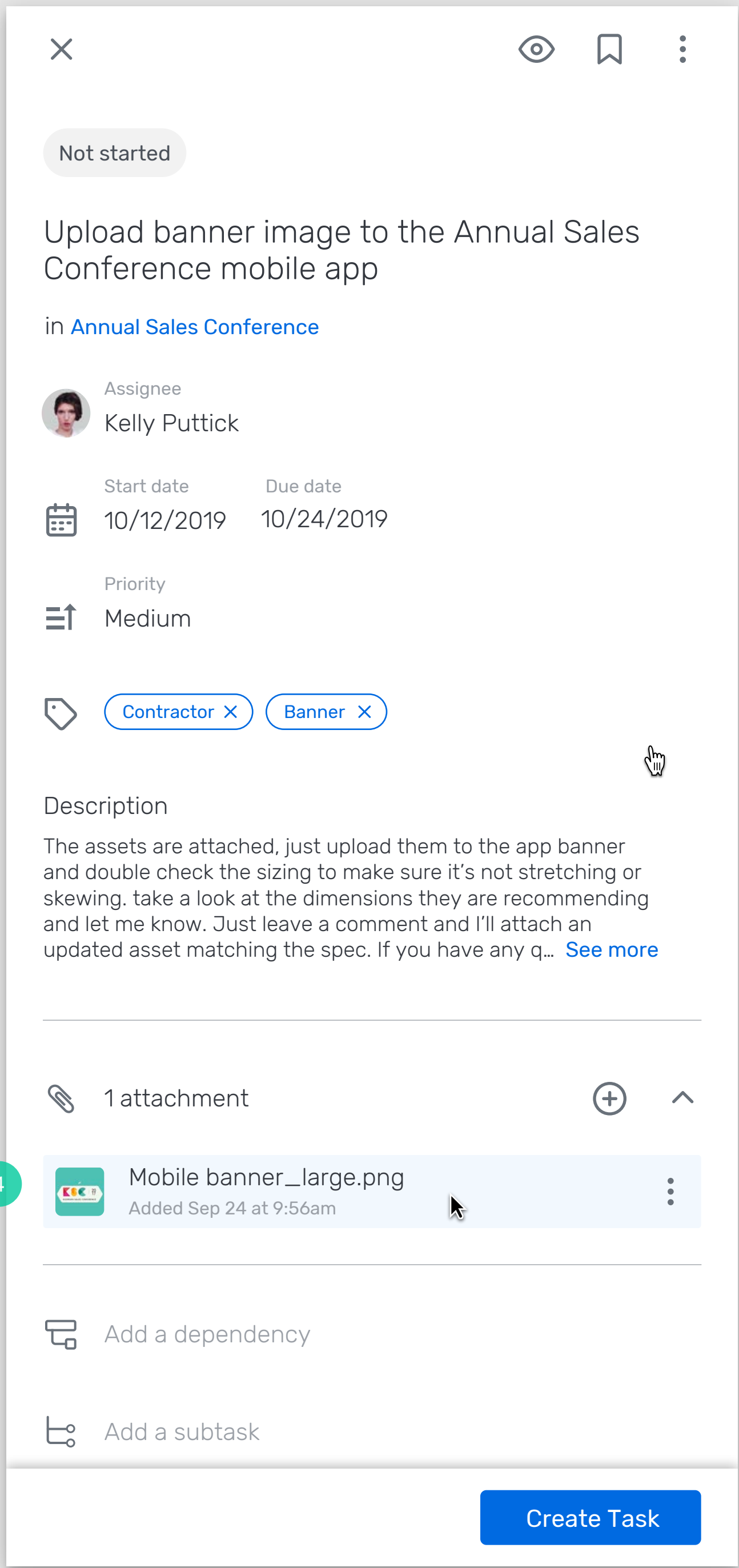
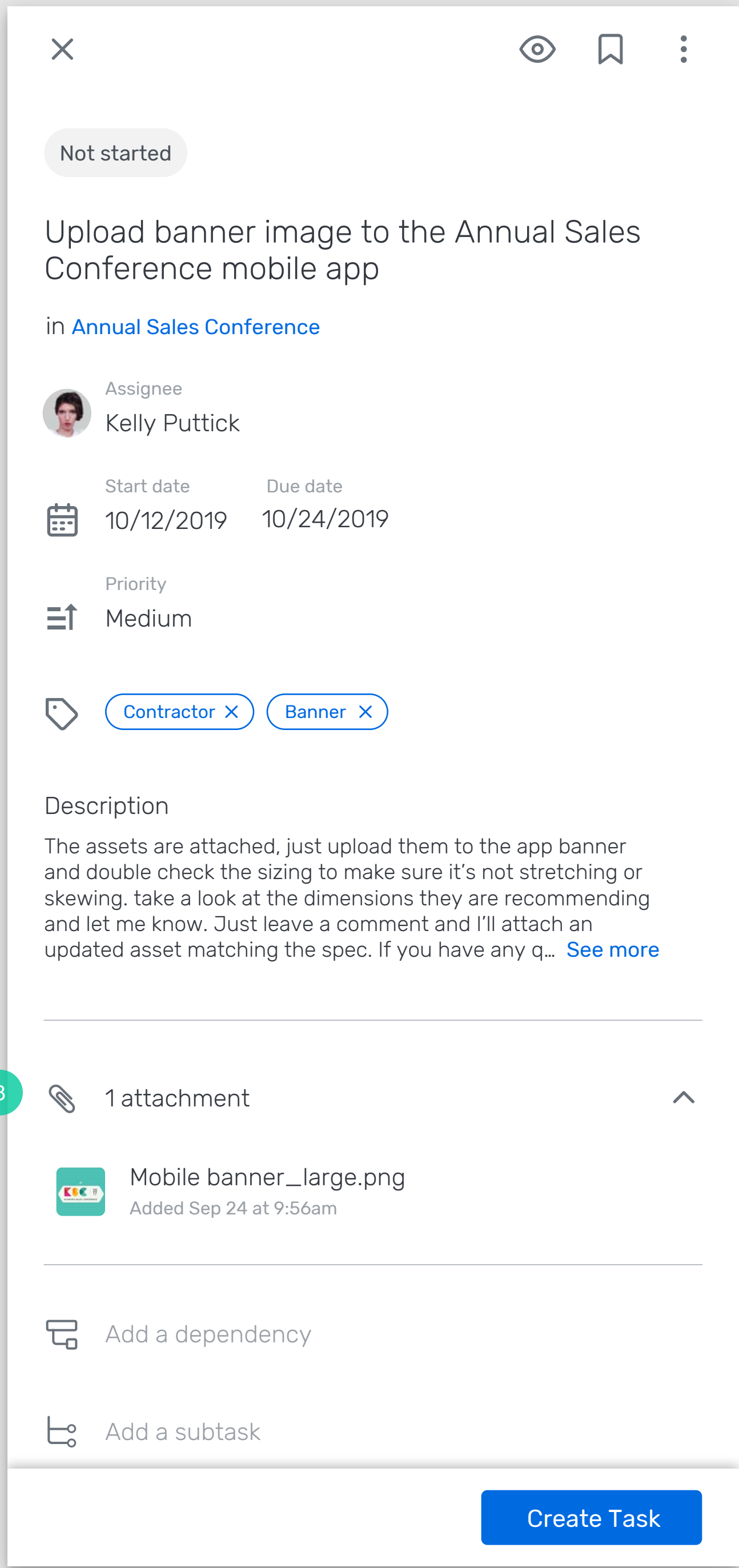
A resizer control is visible in the lower right corner of the field, allowing you to resize the field as needed.
- RICH TEXT CONTROLS**
Rich text controls appear beneath the field, pushing all subsequent panel content down to accommodate.
- DYNAMIC FIELDS**
The field expands as text wraps to the next line, pushing any subsequent panel content down to accommodate.
- DESCRIPTION ADDED**
Tab to the next field, or click outside of the description section to submit the description.
- EDITING THE DESCRIPTION**
Hover anywhere over the description to display its hover state. Click the pencil icon to activate it.
- ACTIVE POPULATED FIELD**
When the populated field is activated, the cursor appears at the end of the entered text. Hovering over the resizer control displays a "resize" cursor.
- MANUAL RESIZE**
-The user can resize the field as needed. As the field is resized, the subsequent panel content is pushed down to accommodate.
- SEE MORE**
In its closed state, the description field shows 5 lines of text. If there is more than 5 lines of content, a "See more" text link appears at the end of the third line. Content will be ellipsed before it reaches the "See more" button.

Clicking "See more" will expand the description in its entirety, remaining in its view state.
- SEE LESS**
When the "See more" link is pressed, the entire description will be displayed, pushing subsequent panel content down to accommodate.

A "See less" text button will appear at the end of the description content. Clicking "See less" will collapse the description back to five lines.



Launch uploader,
choose file and attach



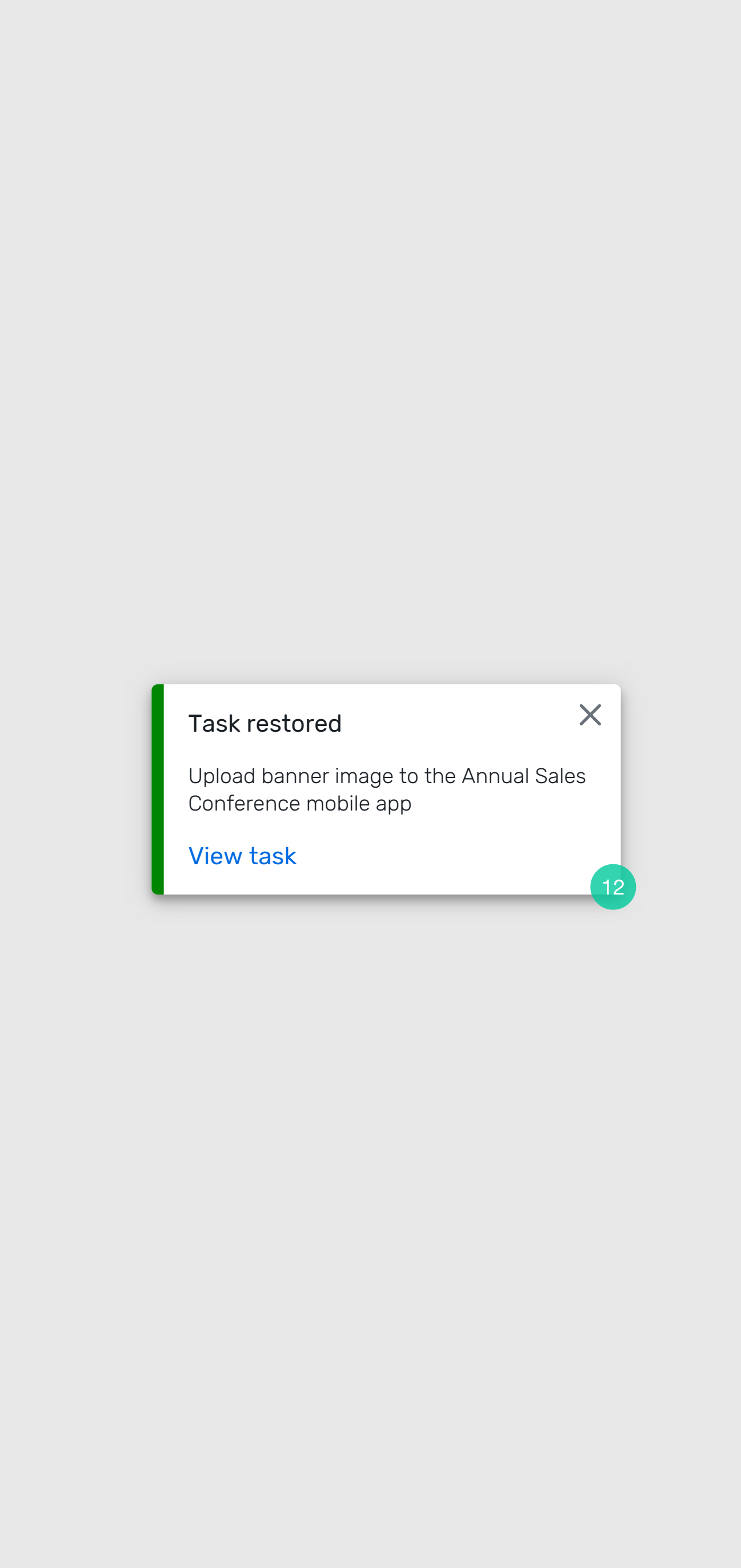
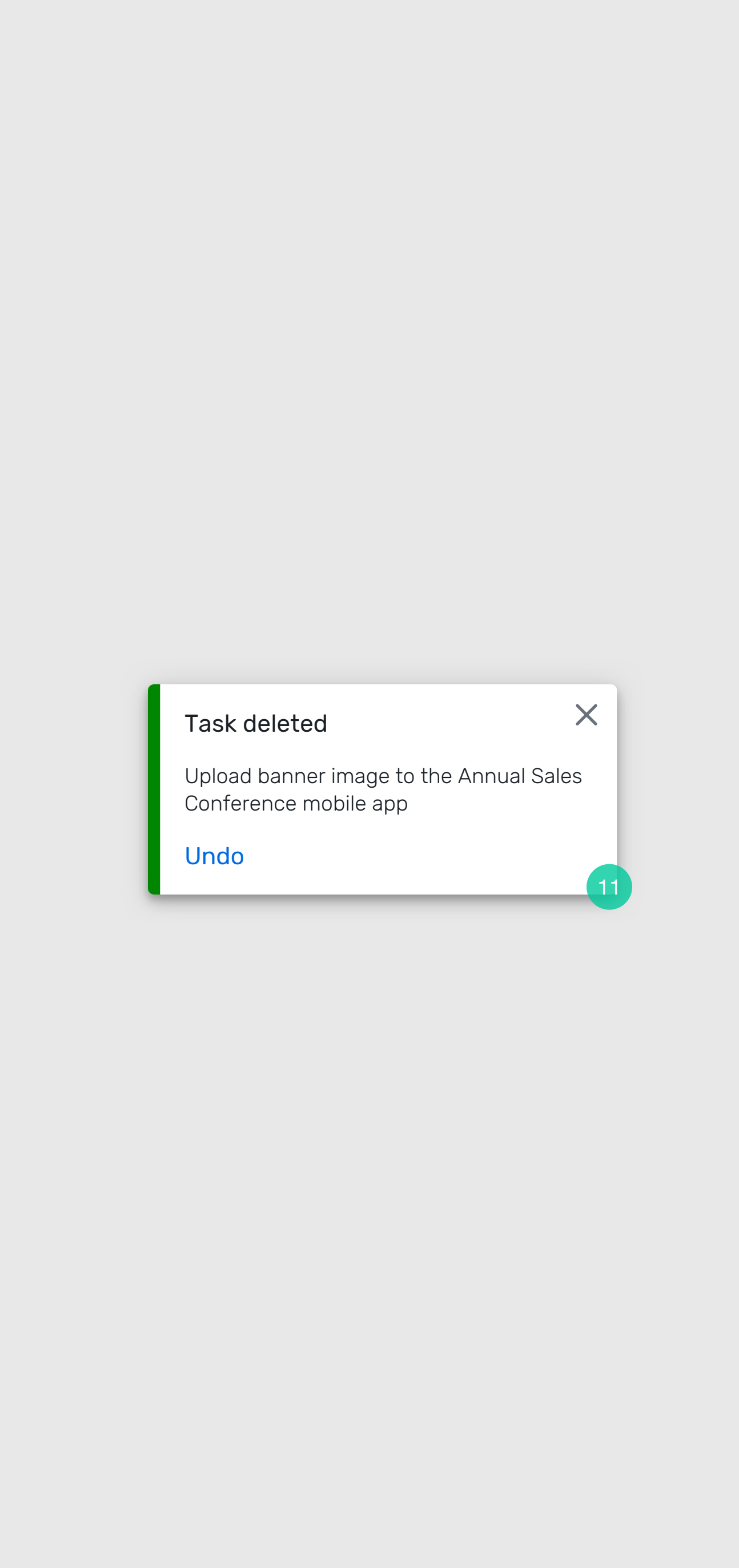
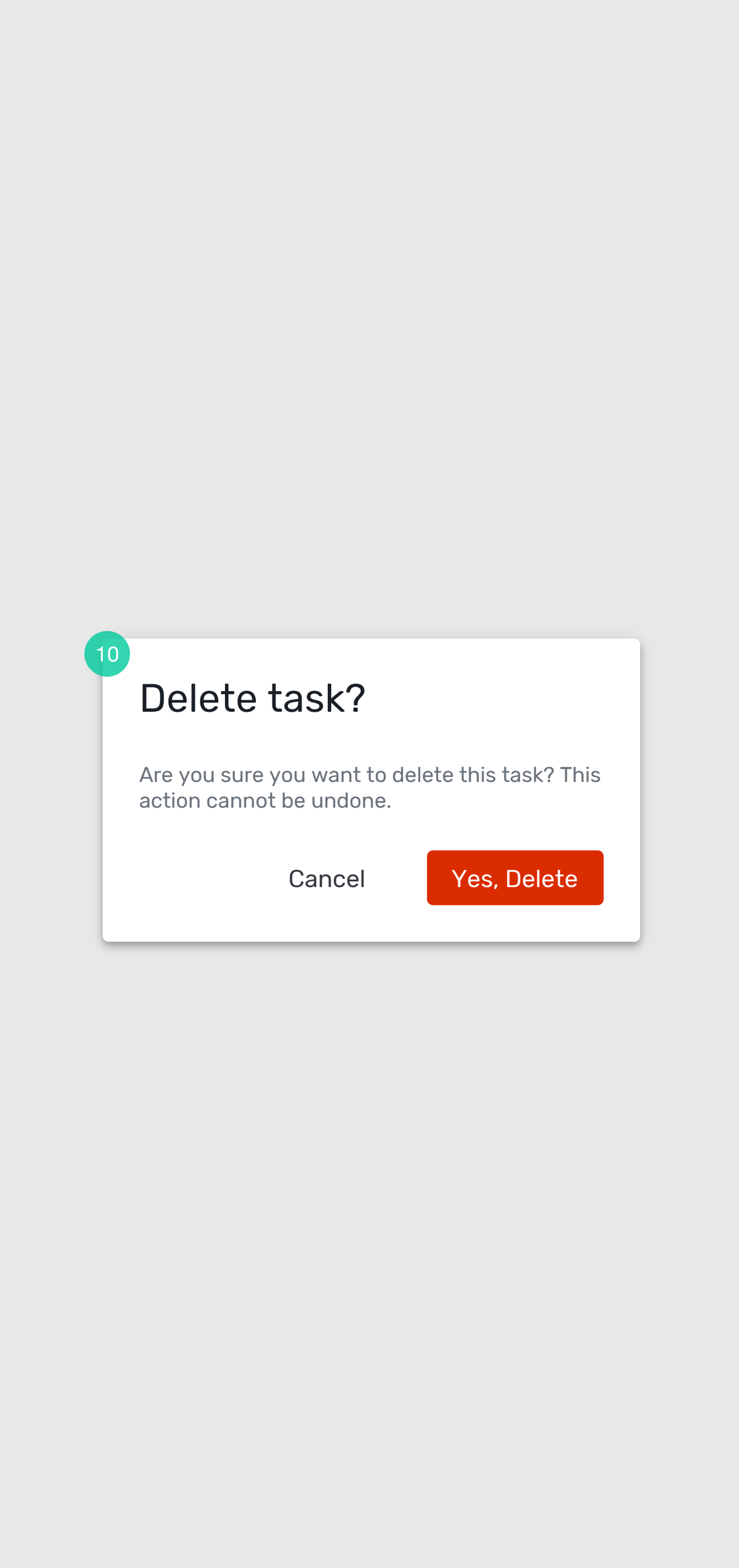
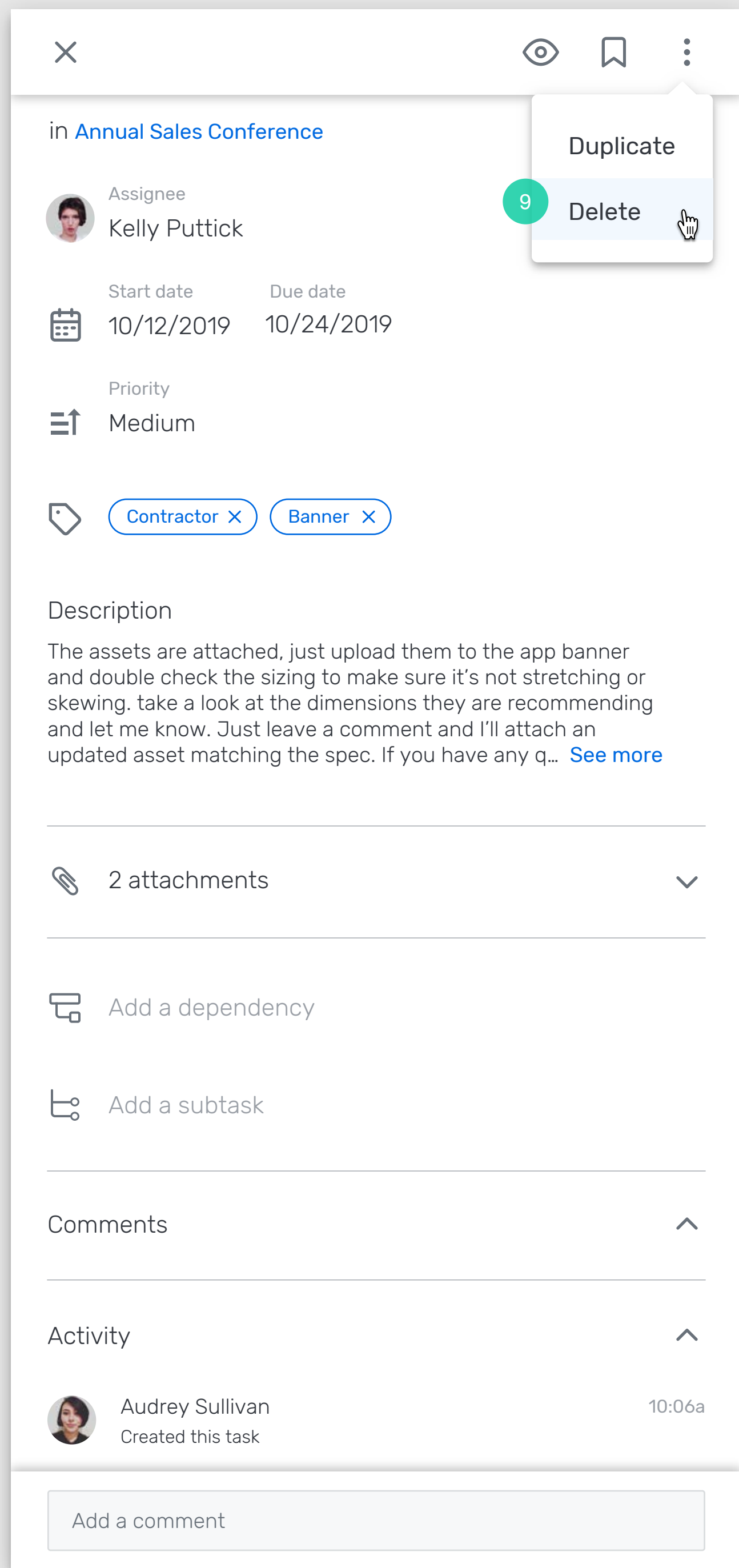
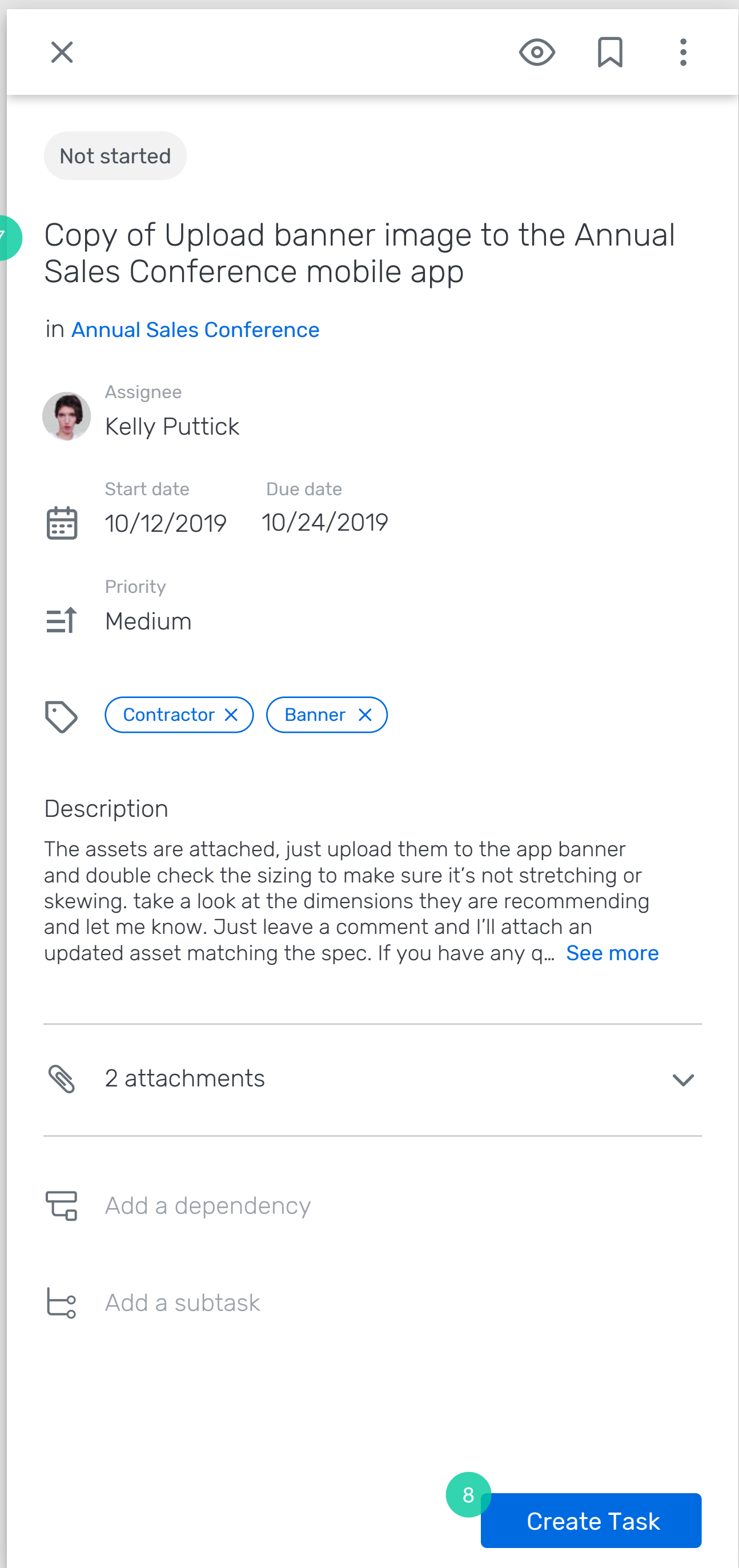
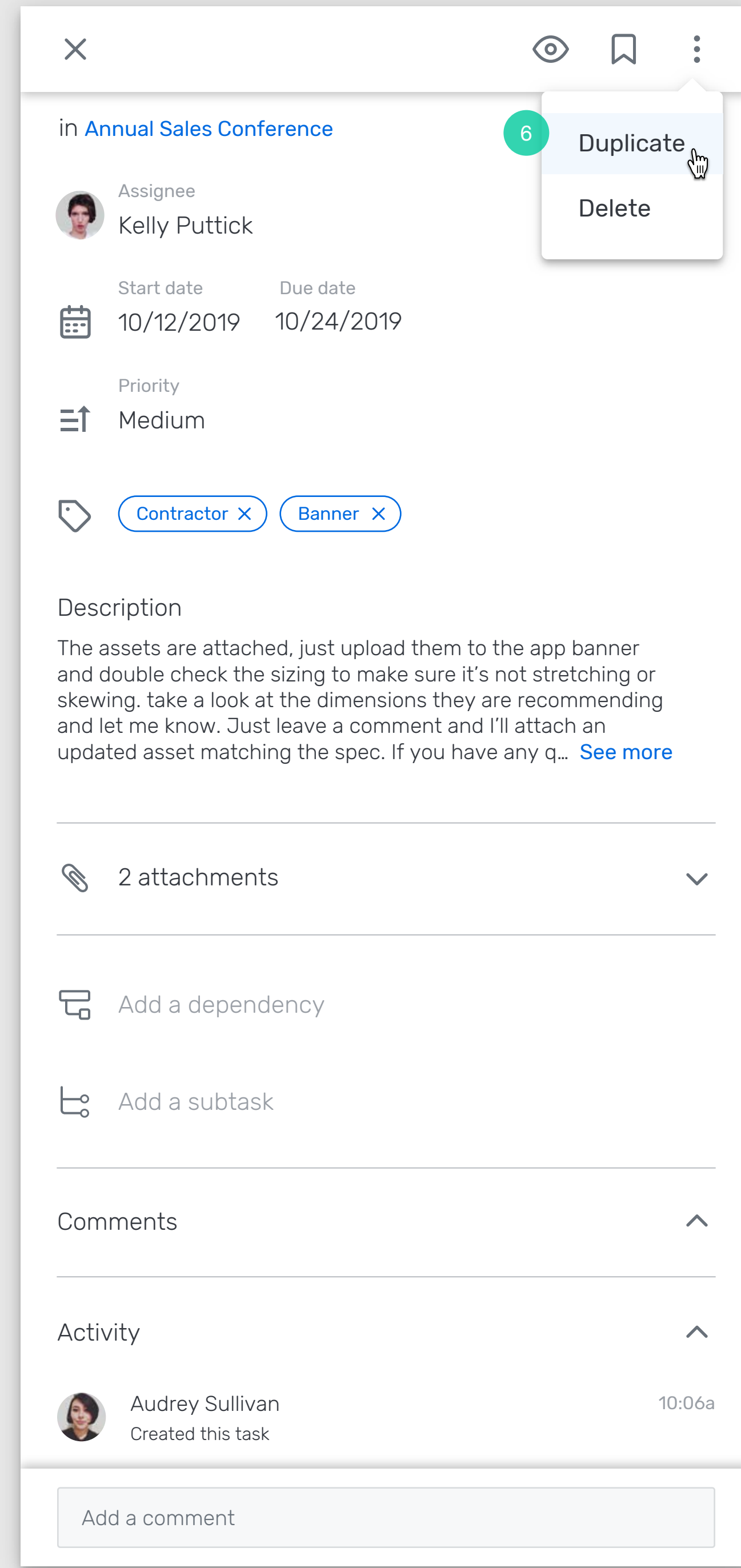
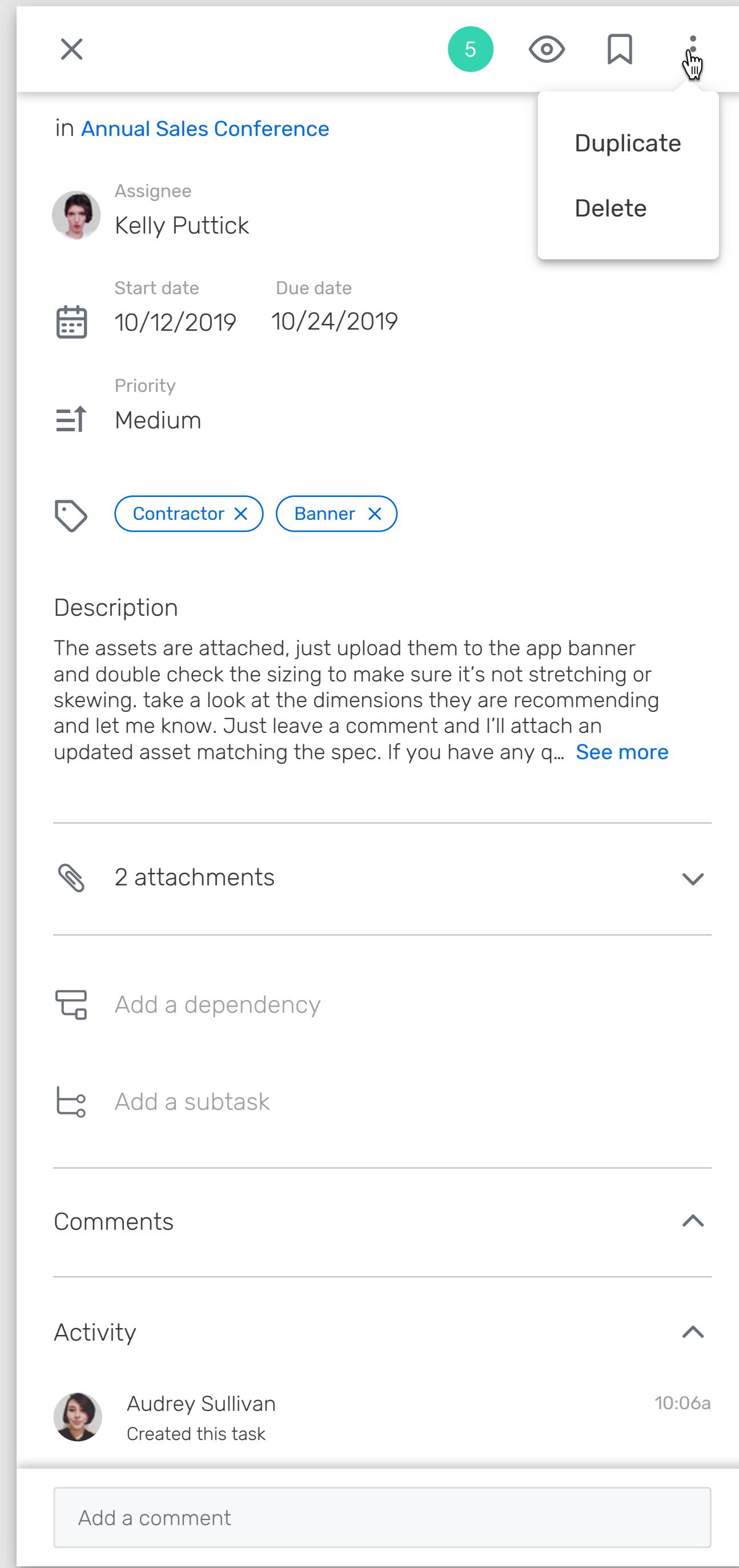
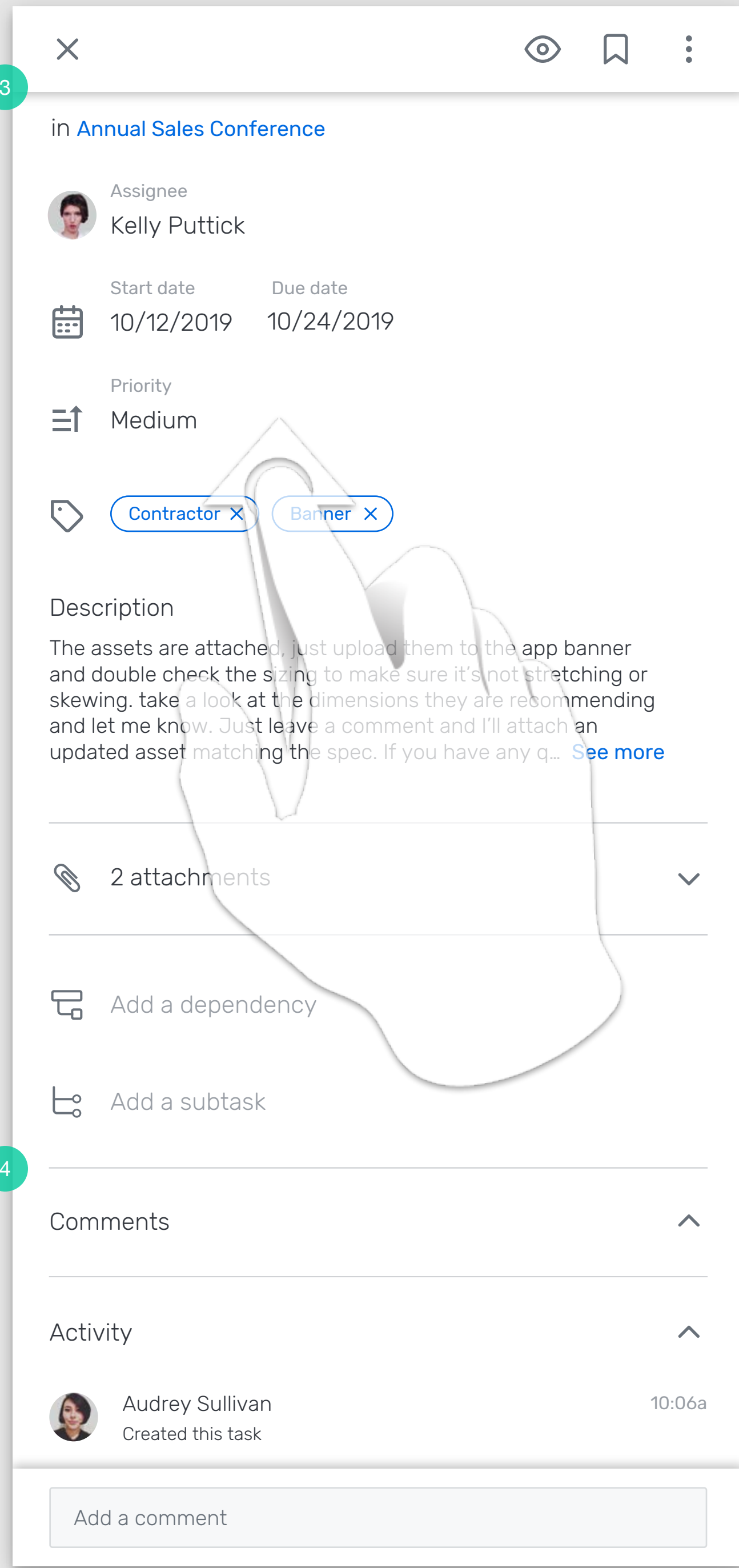
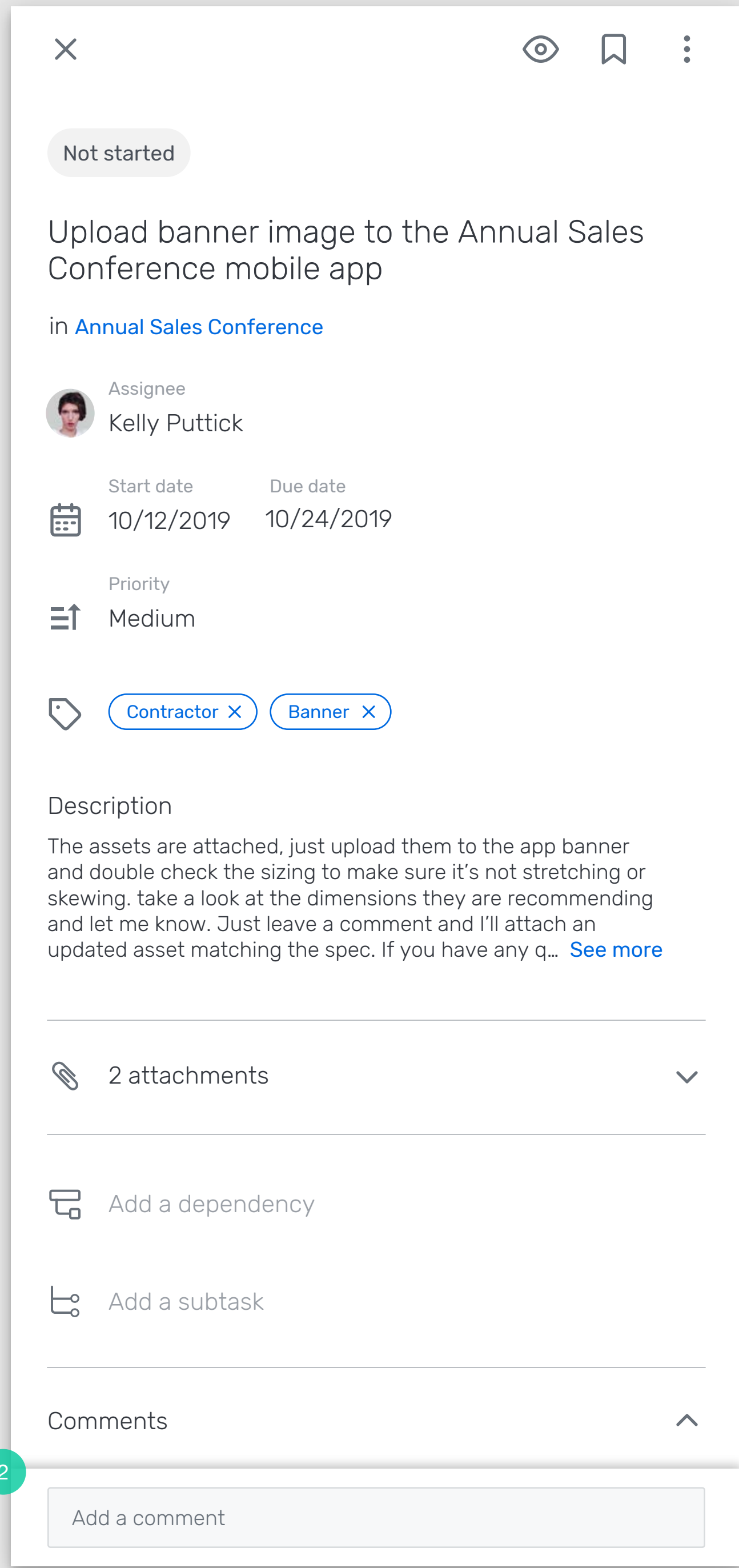
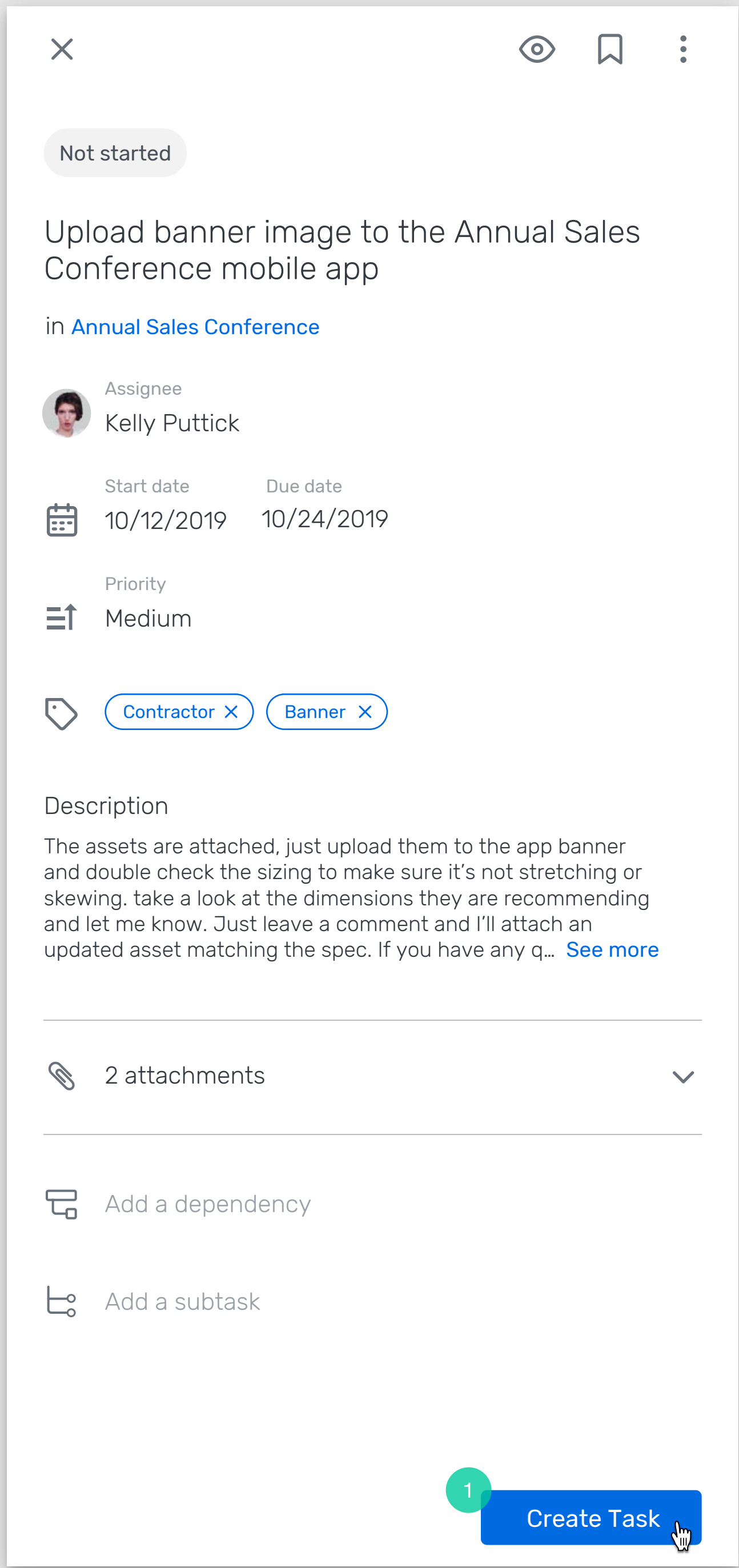
Interaction guidelines

PROJECT: Tasks: Low complexity object
DATE: 10/7/2019
AUTHOR: Mark Iris

SCREEN

Task: Attachments

- 1 HOVER STATE**
Hover over the Attachment section to show its hover state. A "+" icon appears to the right of it. Clicking "+" will trigger the file uploader in a modal, centered over the viewport.
- 2 FILE UPLOADER**
The standard file uploader will be used to select a file to attach to the task.
- 3 FILE ATTACHED**
When a file is attached, the Attachments section header contains a collapse icon. The section is expanded so that the attachment is visible. The section header title will display the number of files attached, "1 attachment."
- 4 HOVER STATE**
Hovering anywhere in the Attachments section will display the "+" icon in the header, left of the collapse icon.
When the cursor hovers over an attachment, its hover state displays, with an options icon.
- 5 OPTIONS**
Clicking the options icon will display the actions you can take.
Deleting the file will remove the file from the task, and return the Attachments section to its default, closed state.
- 6 UNDO**
After deleting a file from a task, a confirmation notification will appear briefly, allowing you to undo the action.
- 7 ATTACH ANOTHER FILE**
To attach another file, hover over the Attachments section and click the "+" icon, triggering the File Uploader.
- 8 RECTANGLE COPY 11**
When a new file is attached, the section header will reflect it, now reading "2 attachments."
Each subsequent file that is attached will appear beneath the previous one(s).
You can collapse the section by clicking the Collapse icon.
- 9 SECTION COLLAPSED**
The section is collapsed. There is no "+" icon in the section header in this non-hover state.
You can expand the section header by clicking the Expand icon.
- 10 HOVER STATE OF COLLAPSED HEADER**
The "+" icon will appear on hover.



Interaction guidelines

PROJECT: Tasks: Low complexity object
DATE: 10/7/2019
AUTHOR: Mark Iris

SCREEN

Task: Create, Duplicate, Delete

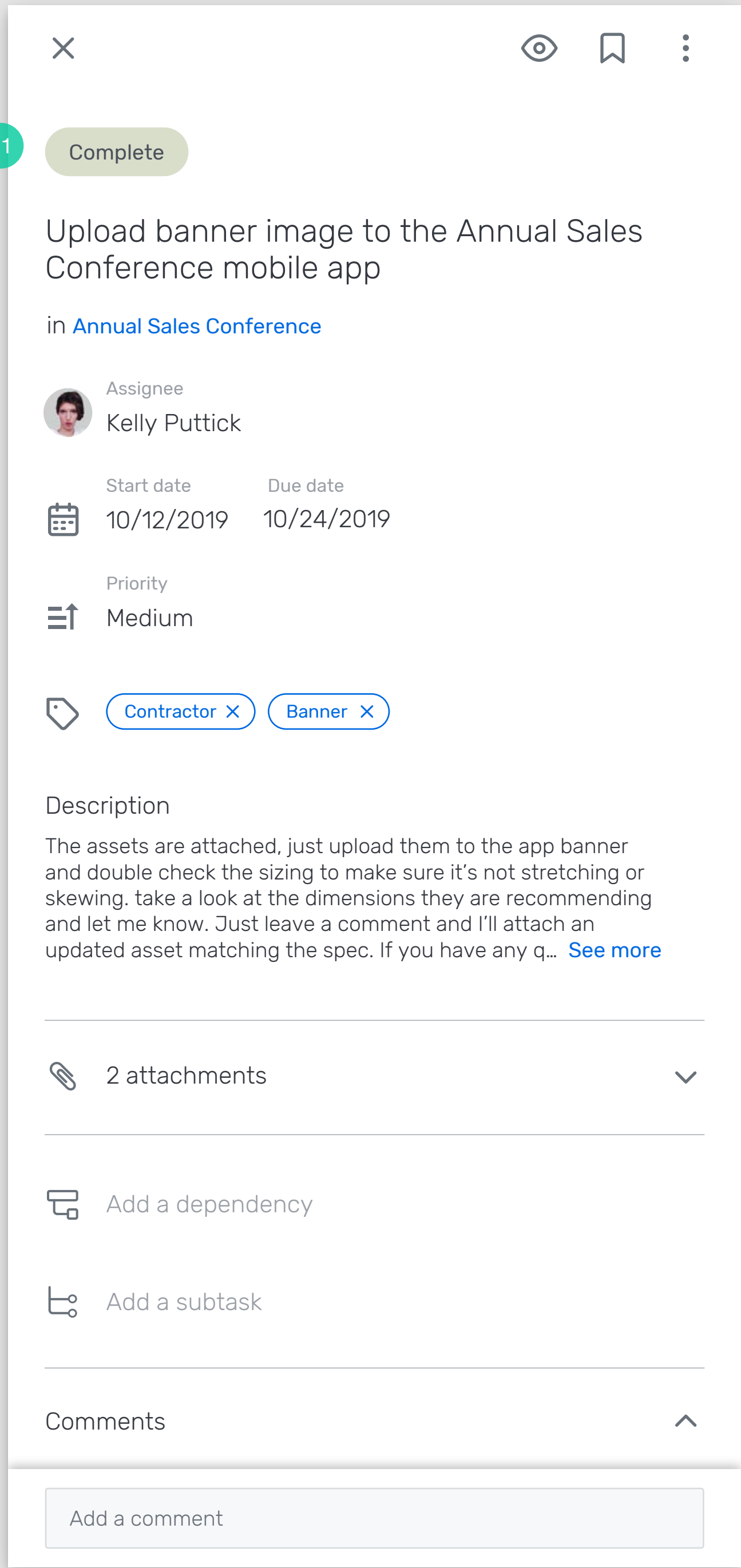
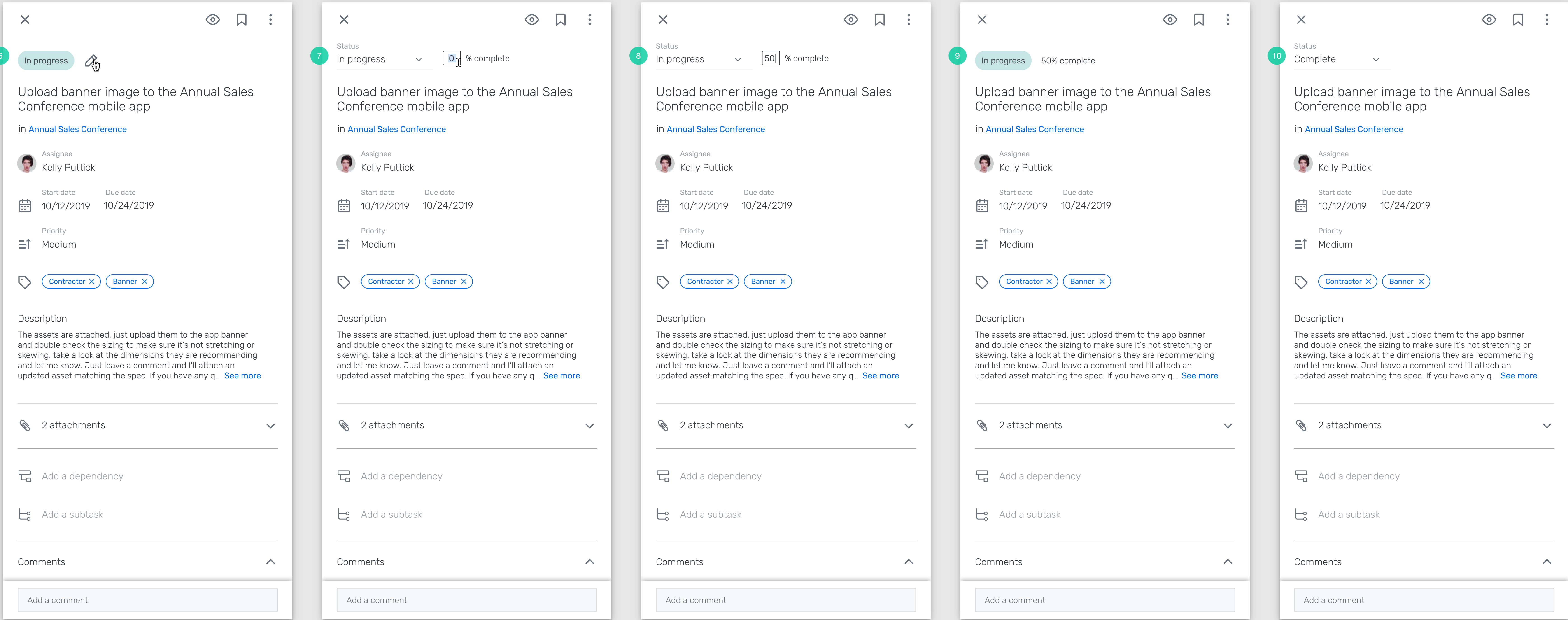
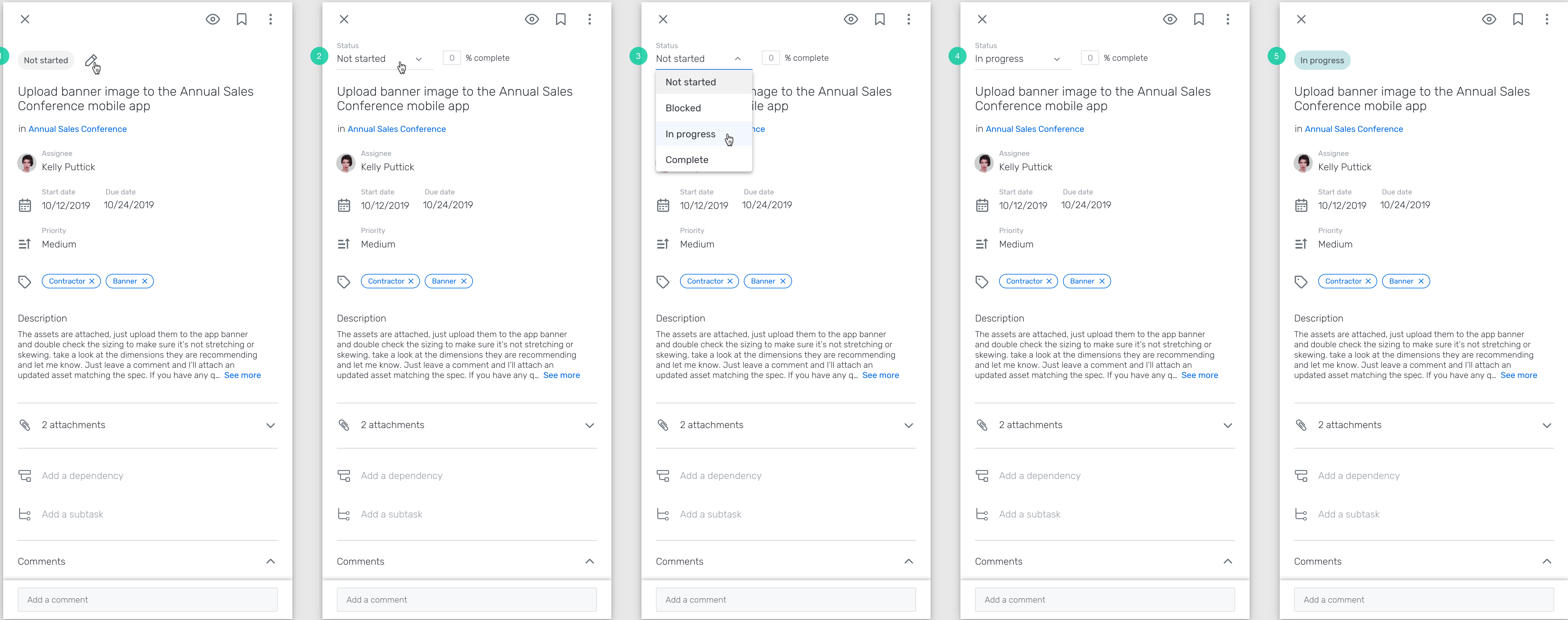
- 1 CREATE TASK**
When you're done adding content to your task, click the Create Task button in the bottom bar.

Note: I'm skipping the Dependencies and Subtasks for now, as this functionality is not available.
- 2 COMMENT BAR**
The task has been created. The Add a comment function appears in the bottom bar. As with all bottom bars, when the panel content reaches it, a shadow is displayed and content will scroll beneath it.
- 3 SCROLLING UNDER HEADER**
Panel content will scroll beneath the Panel Header, just as it did in the "Create" stage.
- 4 COMMENTS & ACTIVITY**
The Comments and Activity sections appear on any created task and are expanded by default.

Any change made to the task at this point will be reflected with an event logged in the Activity section.
- 5 OPTIONS**
Now that the task is created, the "Duplicate" and "Delete" options are available in the Options menu.
- 6 DUPLICATE A TASK**
To make a copy of the task, select Duplicate from the Options menu.
- 7 COPY OF TASK**
After selecting Duplicate, the new copy of the task will load in the panel. The words "Copy of" will be appended to the front of the Task's title.

All content will be copied to the new task. Activity and Comments will not.
- 8 CREATE BUTTON**
Since the new task is not saved yet, the bottom bar will show the "Create Task" button.
- 9 DELETE TASK**
Select Delete from the Options menu to delete the task. Once selected, the panel will close by sliding off the screen, to the right.
- 10 CONFIRMATION DIALOG**
Before the task is deleted, a confirmation dialog appears. Confirm to delete the task.
- 11 UNDO**
A notification will appear briefly to confirm the action, allowing you to undo it.
- 12 TASK RESTORED**
Click the Undo button to restore the task. When the task is restored, the Toast will display a confirmation message, and provide a link to view the task.

Clicking View task will trigger the task panel to open from the right side of the screen.



Interaction guidelines

PROJECT: Tasks: Low complexity object
DATE: 10/7/2019
AUTHOR: Mark Iris

SCREEN

Task: Status

- HOVER STATE**
To change the status of the task, hover the cursor over the Status section. Click the pencil icon to activate the section.

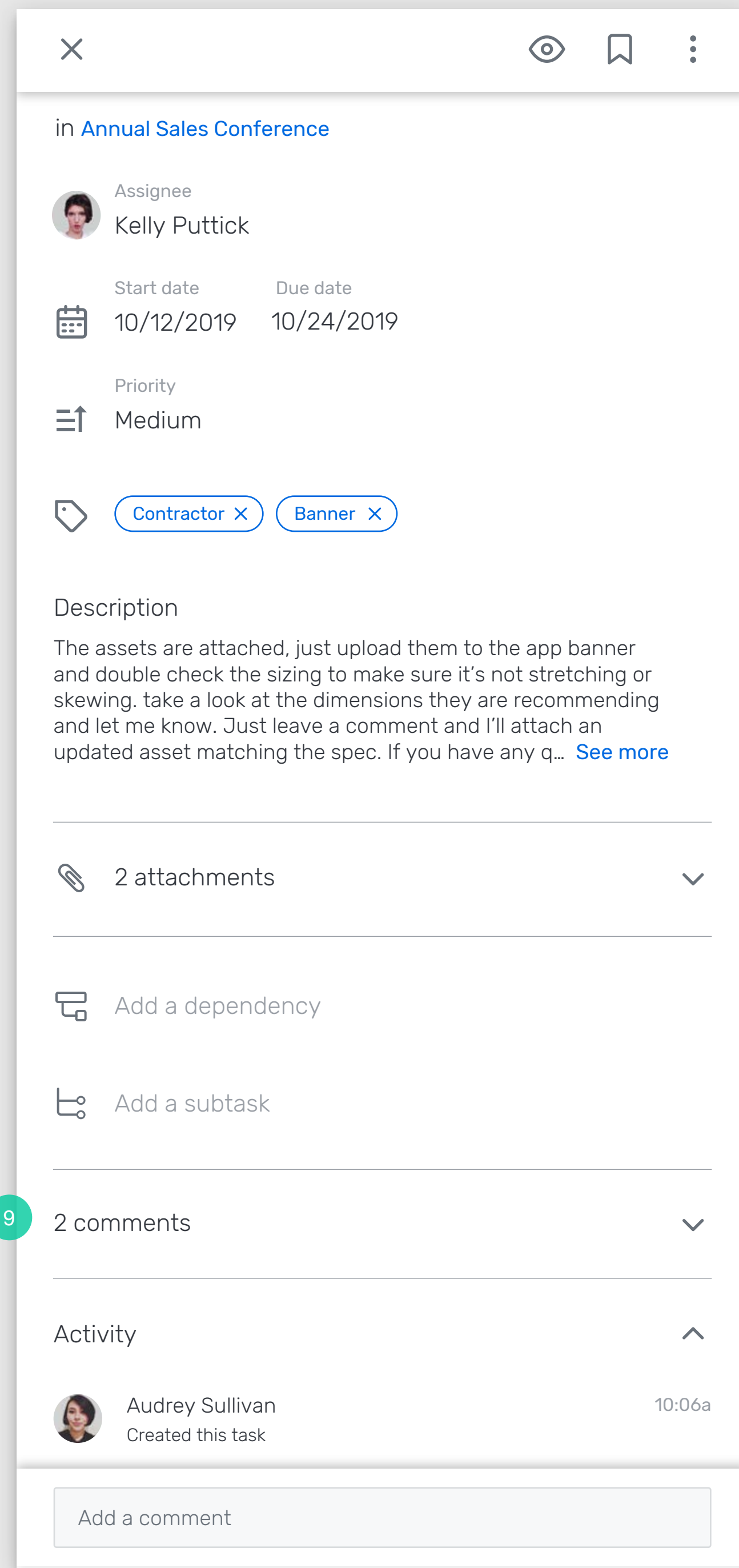
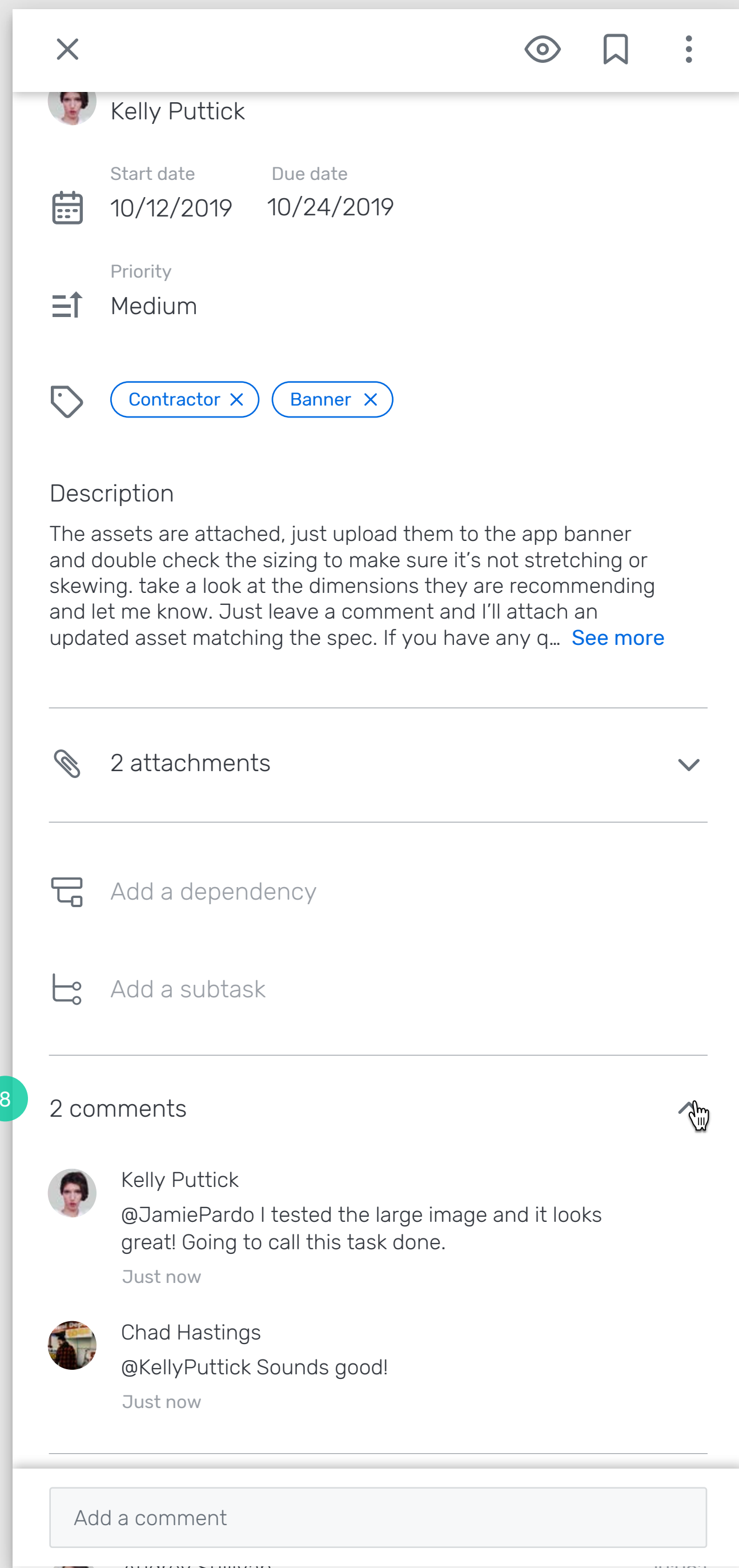
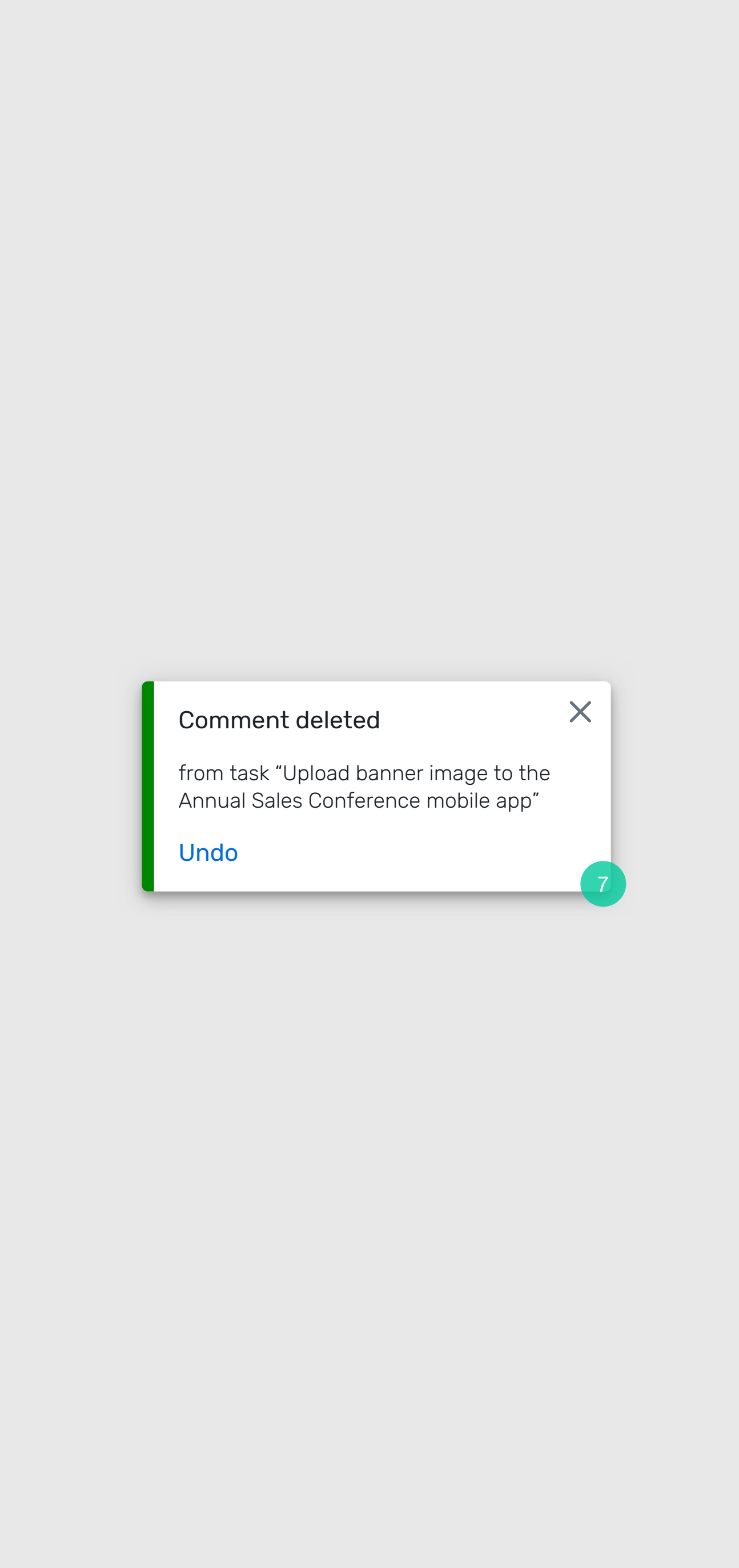
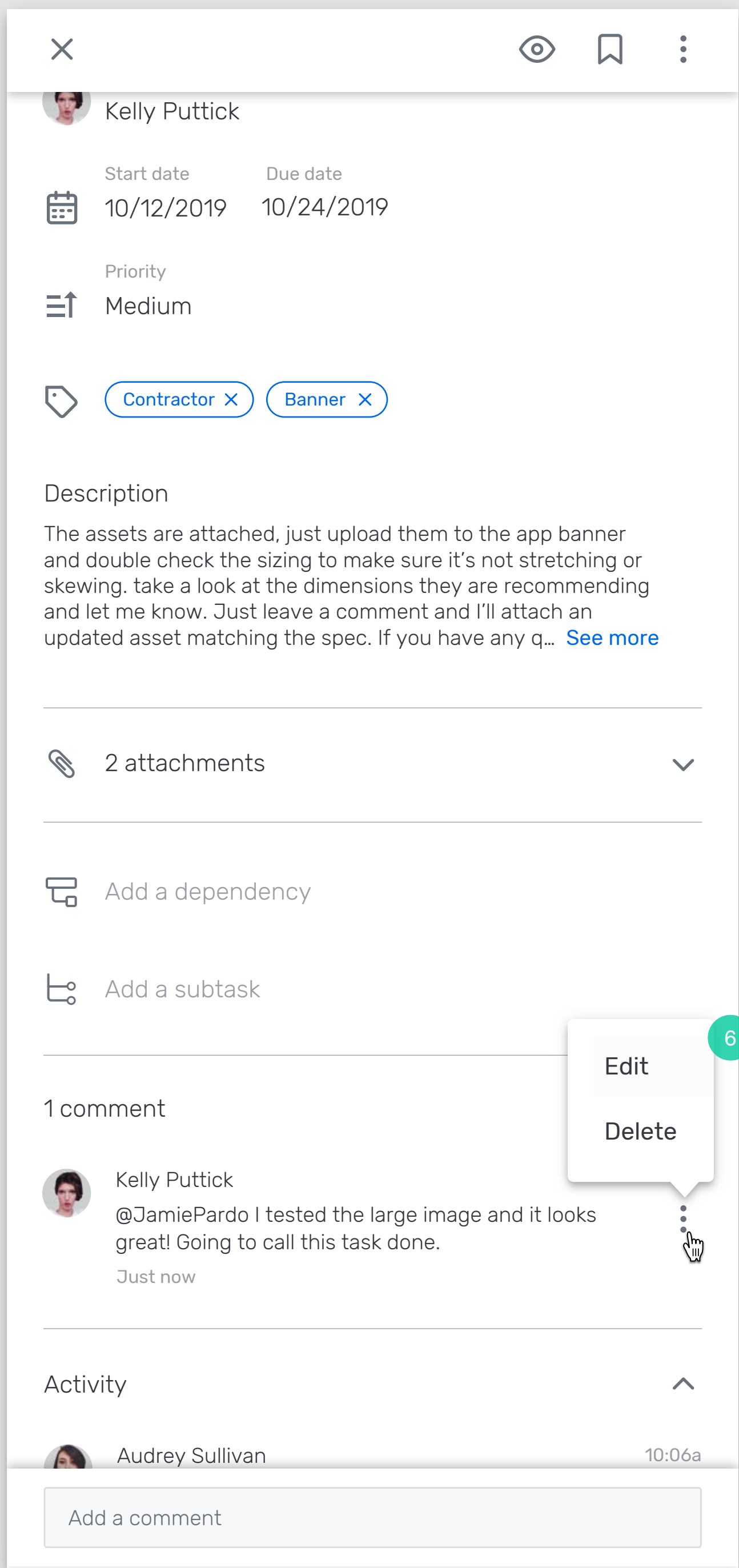
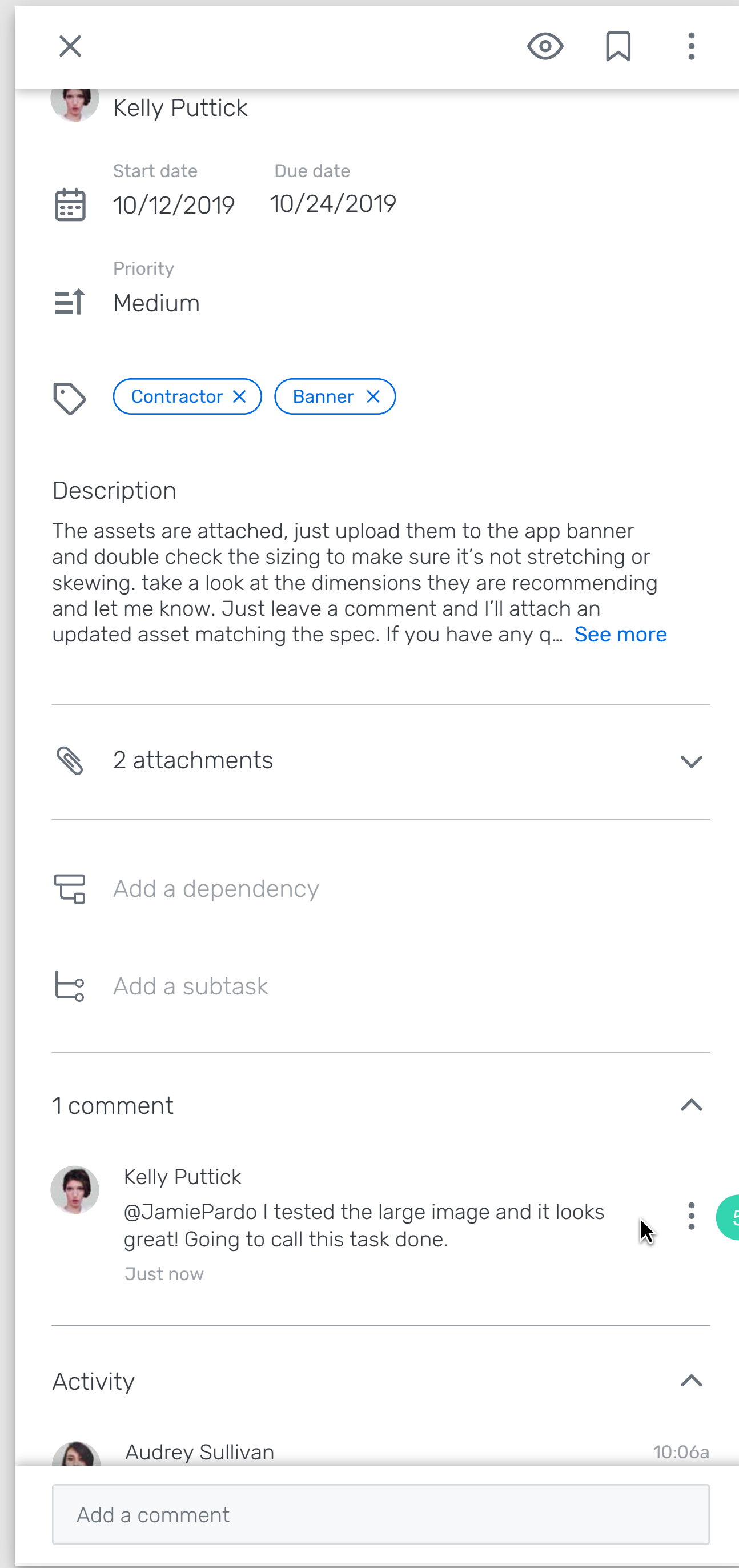
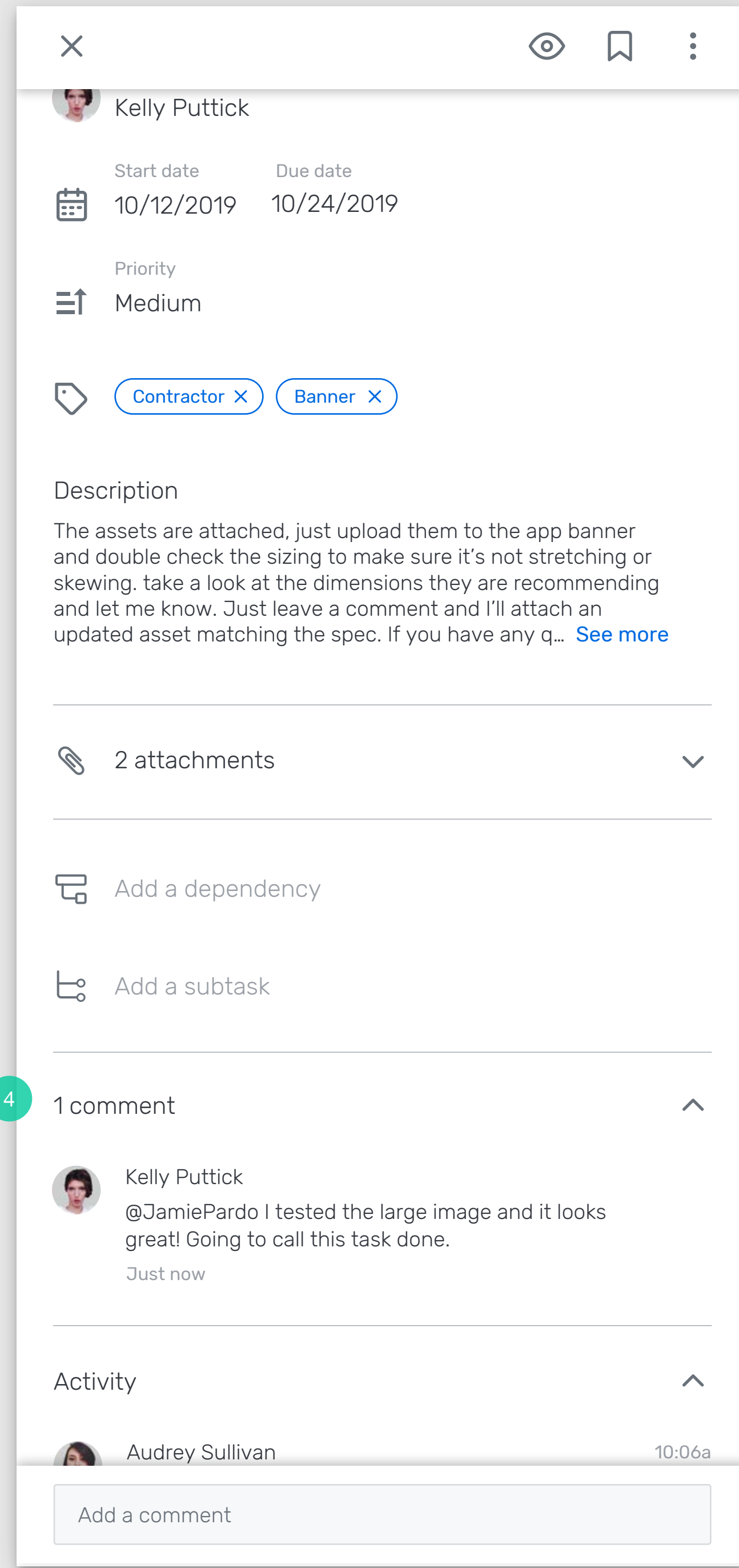
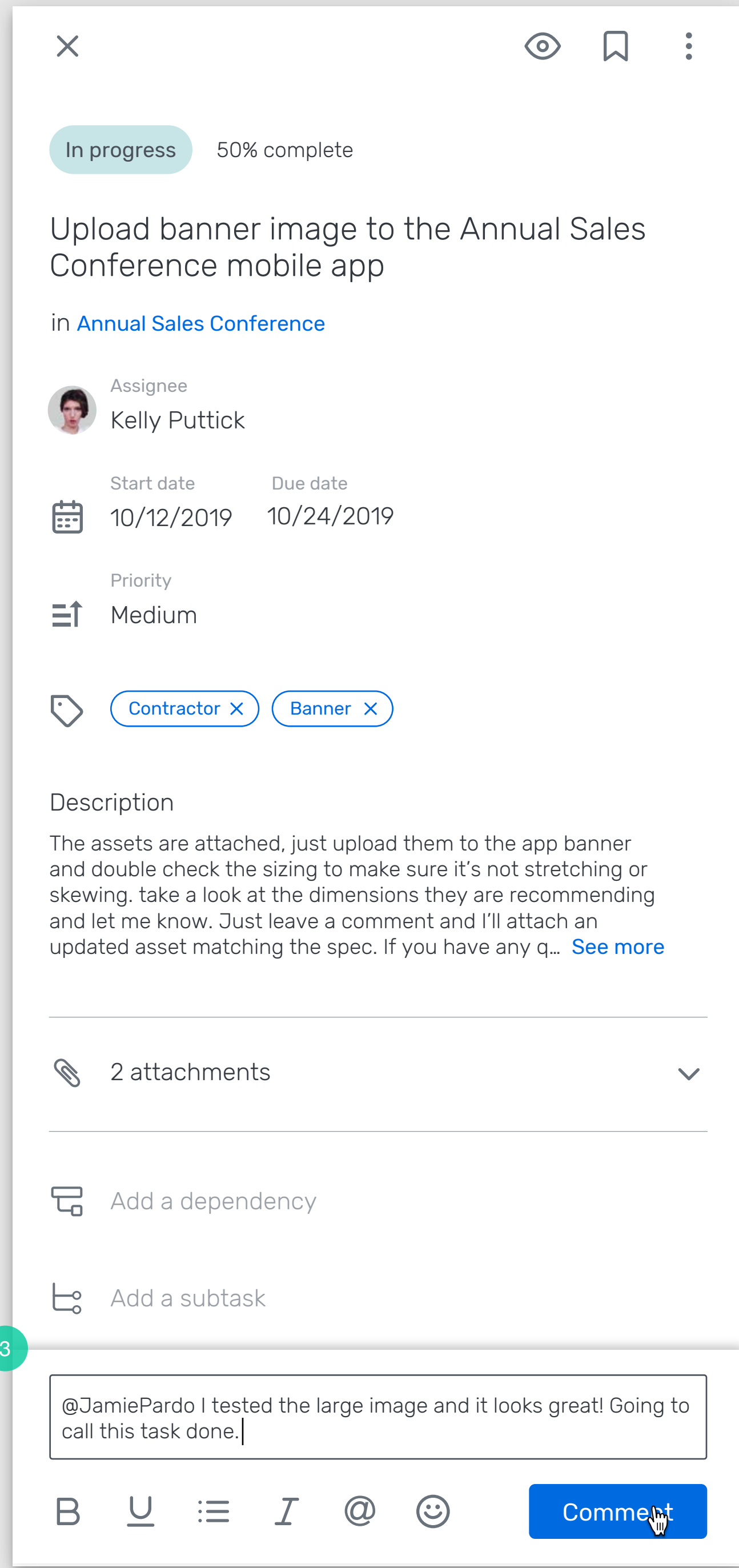
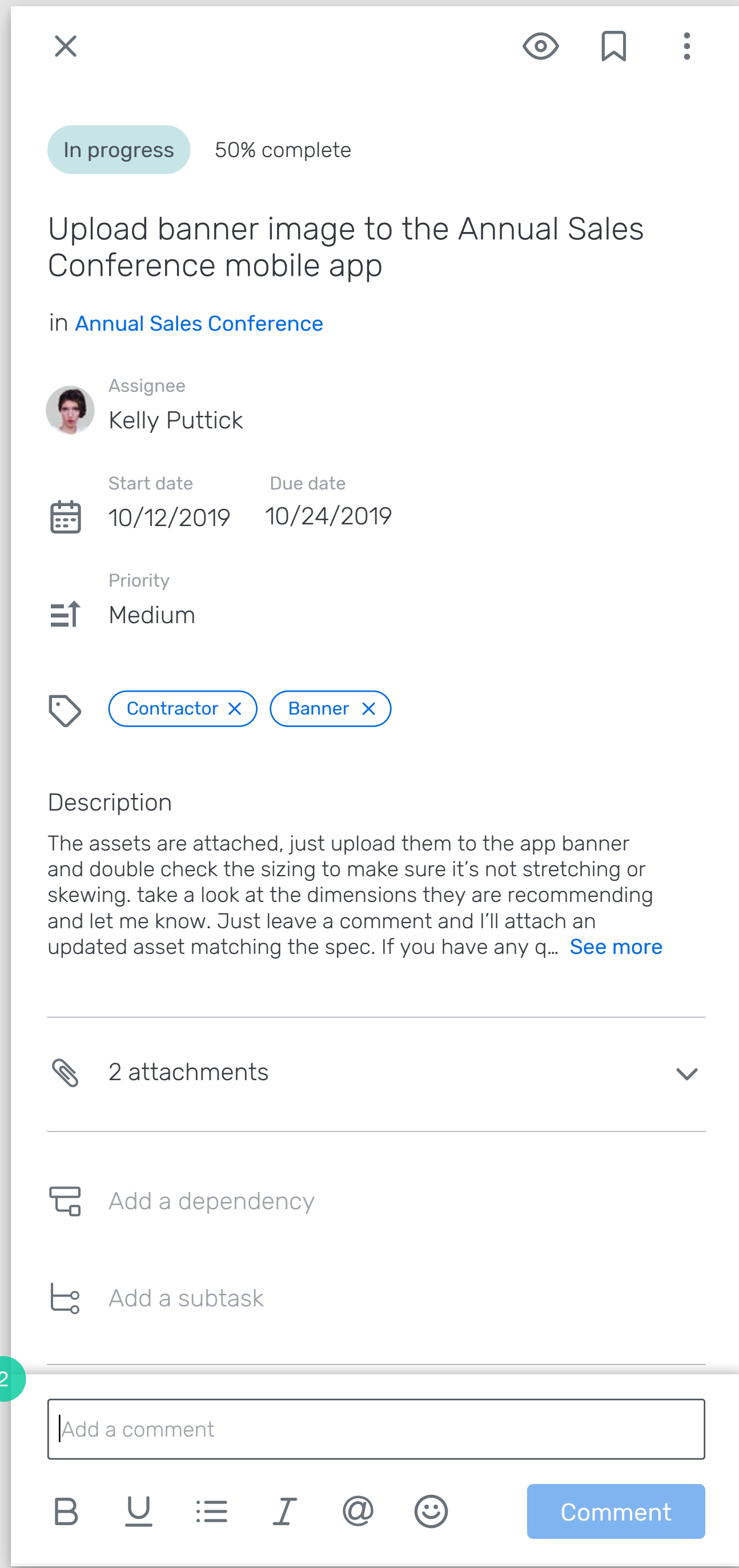
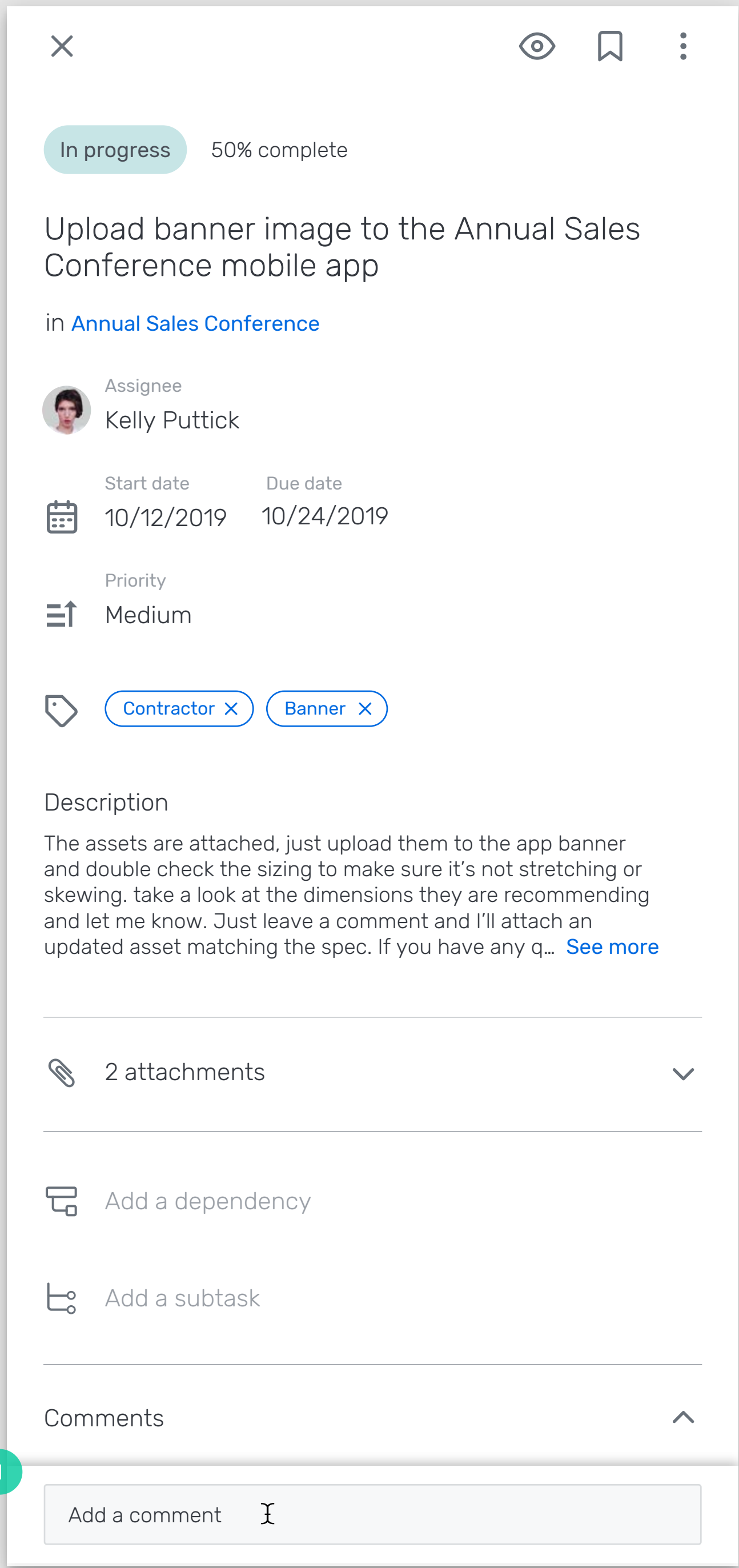
Note: You can change the status of the task before the task is created using the same method.
- ACTIVATED SECTION**
When the status section is active, it will display a dropdown menu, and a field for "% complete."

By default, a new task's status is set to "Not started," and the "% complete" is set to "0."
- STATUS DROPDOWN**
Click the Status dropdown menu and select any of the available options.
- STATUS SELECTED**
After clicking an option, the menu will close and the selected status will display in the dropdown field.

When the "% complete" is "0" or "100" it will not be shown when the Status section is closed.
- STATUS SET**
Click anywhere outside the status section, or tab to a new field to collapse the Status section.

The new progress will be displayed on the task in a status indicator style.

When a "0" is in the "% complete" field, the task will not display any % complete indication.
- EDIT STATUS**
As before, hover over the Status section to display a pencil icon. Click it to reopen the Status section.
- PERCENTAGE COMPLETE FIELD**
When you click into the "% complete" field, the current value will be highlighted, allowing you to begin typing immediately.
- SETTING PERCENTAGE COMPLETE**
Enter a new % complete value into the field and press enter, tab to a new field, or click outside the Status section to close it, submitting your status.
The field will only allow 2 characters to be entered.
- STATUS UPDATED**
The task is now set to "In progress" and "50% complete"
- SET STATUS TO COMPLETE**
When a task's status is changed to "Complete," the "% complete" field and label are removed.
- TASK COMPLETE**
The task's status has been set to "Complete."



Interaction guidelines

PROJECT: Tasks: Low complexity object
DATE: 10/7/2019
AUTHOR: Mark Iris

SCREEN

Task: Comment

1 COMMENT BAR

Click the Comment field in the bottom bar to activate it. The cursor appears as an "I-beam" when overing over the field.

2 ACTIVATED COMMENT BAR

The bottom bar will expand over the panel content, and the cursor will be placed in the field, in front of the helper text.

Entering a character in the field will replace the helper text and activate the "Comment" button.

3 RECTANGLE COPY 16

The Comment field and bottom bar will expand as text wraps to new lines.

Type "@username" to mention someone linked to your account. They will receive a notification of the mention. Suggested users will appear in a popover, being refined with type-ahead, as you type their name. A detailed design will be made when this functionality is scheduled to be built.

Click comment to leave your comment on the task, collapsing the Comment field.

4 COMMENTS SECTION

The comment appears in the Comments section, which will expand if it is not already expanded.

The Comments section header reflects the amount of comments, now reading "1 comment."

Note: Comments have a time stamp of their own, so they do not need to be logged as an event in the task's Activity.

5 HOVER STATE

Hover the cursor over a comment to see the options icon.

6 EDIT & DELETE

If you are the creator of the comment, the options to Edit or Delete the comment will be available.

Selecting "Edit" will activate the Comment field, with the comment's contents in the field, and the cursor at the end of the text.

Selecting Delete will remove the comment, and display a confirmation notification.

7 UNDO

After deleting a comment from a task, a confirmation notification will appear briefly, allowing you to undo the action.

8 COMMENTS SECTION

As more comments are added, the section header will reflect them.

Click the Collapse icon to collapse the section.

9 COLLAPSED SECTION

The comments section is collapsed. Adding a comment will expand the section, showing the most recent comment on the bottom. The panel content will scroll as needed to ensure the comment is visible to the user.