Tasks

Tasklists

- Managing your personal tasks in the workbox
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You can manage your personal tasks in the Workbox, which can be accessed by clicking on the 🗓️ or 📌 icon (depending on what theme you are using) beside the searchbox in the header.

You can also create a list of tasks on a page, and assign them to your colleagues via @Mentions. Changes made in the workbox are reflected in the task list on the page, and changes made on the page are reflected in the workbox too.

There are a few ways that you and other people can assign tasks to you:
• You can add a personal task via the workbox.
• You can add a notification to your task list, via the notification workbox. This is useful if you want to get back to it later.
• Someone can assign you a task from a task list on a Confluence page.

Managing your personal tasks in the workbox

The Workbox displays your notifications and your personal tasks in separate tabs. The task tab shows the tasks assigned to you. When you update a task that originated in a task list on a page, the update is reflected in the task list too.

To manage your tasks:

1. Choose the workbox icon, or in the Confluence page header.
   - You can use the keyboard shortcut: Type g then n. (When in the Confluence editor, click outside the editor pane before pressing the keyboard shortcut keys.)
   - The icon indicates the number of unread notifications.

2. Choose the personal tasks icon:

3. To add a task and assign it to yourself, type the task summary in the text box and choose Add task.
4. To prioritise tasks, drag and drop them into your chosen order. (Click a task, hold down your mouse button to drag the task into position, then release the mouse button.)
5. To complete a task, or mark it as incomplete, choose the check box next to the task.
6. To add notes to a task and see further information (for example, a related page) choose View tasks details. The task details dialog will open.
7. To see the tasks that are marked as complete, choose View completed.

Adding your Notifications to your Tasklist

You can flag a notification as a task. This is useful if you want to take action on the notification later.
1. Choose the workbox icon or in the Confluence page header.
   - You can use the keyboard shortcut: Type g then n. (When in the Confluence editor, click outside the editor pane before pressing the keyboard shortcut keys.)
   - The icon above shows that you have 3 unread notifications.
2. Choose the notifications icon.
3. Choose the notification that you want to add to your task list. The notification details dialog will open.
4. Choose the ‘add task’ icon to add this notification to your tasks. The notification will remain in the notification list too.

Creating task lists and managing tasks on a page

Task lists on a page are useful for assigning and managing tasks in a team.

To add a task list on a page:

1. Edit the page.
2. Choose the task-list icon in the editor toolbar, or press [ and then ] on your keyboard.
3. Type the description of the task.
4. If you want to assign a task to someone, use an @Mention in the task description. That person will receive a notification, and the task will appear in their personal task list in the workbox. If you @mention yourself, the task will appear in your personal task list.
5. To end the list, press Enter twice.