Quick Start Guide - Tasks (Add/Edit/Delete)

What's a task? Think of a task like a shortcut to campus services.

Institutions deliver a myriad of services to students, faculty, and staff from registering students to checking out library books and maintaining health records. Tasks are configured to provide access to these systems, services, or applications in one place (without having to remember a bunch of unique URLs).

If you are an administrator creating your first task, please refer to the Getting Started (Quick Start Guide) as the following fields must be configured first:

- Categories (Filter Settings > Categories)
- Task Contacts (Tasks > Task Contacts)
- Publishers (Advanced > Permission Groups)

Add a task

1 To add a task, click on the **Task** drop down from the left side tabs, then select **Task List.**

2 Click **+New Task**. Next, take a deep breath as there are quite a few fields that can be completed. Don't worry, most tasks don't require every box to be completed and only the fields with Red text and box are required.

New Task Definition
General

Task title	Task URL	Test	Application Name	Launch
				☑ Open Task in a new tab/window
Title is required	URL is required			

Authentication Type	Primary Contact ⊕	Secondary Contact ⊕	Mobile
	Select Contact	No Contact	☐ This Task is mobile-friendly.
	Please select a contact		

3 Enter a **Task Title** and **Task URL**. [Required]

- Keep the **Task Title** simple as it will be used throughout OneCampus (e.g. Email or Grades)
- The **Task URL** (where you will send the user) must include the complete web address (including http:// or https://)
  - Outbound parameterized URLs may be used here. (Note: this is typically for rare situations where an end system has complicated URL needs. **Talk to your IT team about how to take advantage of this only if needed**.
    - Variables that rSmart will replace in the URL with values (All uppercase):
      - $(PERSONID)
      - $(FIRSTNAME)
      - $(LASTNAME)
      - $(USERNAME)
      - $(EMAILS)
      - $(ROLES)
      - $(MARKETS)
      - $(GROUPS)
    - *Note: These variables are the attribute mappings.
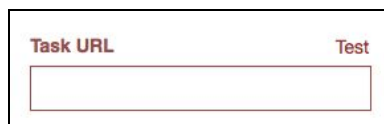   - General format: parameter=$(VARIABLENAME)
    - As an example, a URL entered as:

      `https://institution.edu/someapp/$(ROLES)?roles=$(ROLES)&markets=$(MARKETS)`

      will end up looking like this for a user who is a Staff and Student role on the "Springfield" campus:

      `https://institution.edu/someapp/Staff,Student?roles[]=Staff&roles[]=Student&markets=Springfield`
  - You can test to see if your URL is working by clicking the "Test" link above the URL field.

4 Enter an **Application Name**. [Optional]

- The application name is the name of application that provides the task. This option is handy if two tasks have the same name (e.g. a student version and a faculty version). Anything typed in this field will be listed in italics beneath the task title on the task tile.

5 To open the task in a new tab/window, leave the **Launch checkbox** checked (default). End users can override this in their personal settings if desired.

6 Select an **Authentication Type**. [Optional]

- **None** - Task doesn't require authentication (and therefore OneCampus won't pass anything to the destination).
- **External** - Authentication not done by your institution. (OneCampus will pass personID to the external destination.)
- **Internal -** Authentication is done by school's authentication. (OneCampus will pass the entire SAML ticket and SSO data to the destination - essentially carrying over the SSO.)
    - In this case the user will authenticate and be redirected to the desired destination.

7 Select a **Primary Contact** for this task. [Required]

- Publishers and Administrators can choose an existing contact from the drop down list.
- Administrators also have the option of creating a new contact at this point. ⊕
    - By clicking the plus sign button (located above the contact field) you will be redirected to the contacts module where you can then create the new contact. Once you click the save button within the contacts module, you will be redirected back to the task creation page to continue your work.

8 Select a **Secondary Contact**. [Optional]

- This field is helpful when a task has multiple "owners" or people/groups who can answer questions about the task.
- Publishers and Administrators can choose an existing contact from the drop down list.
- Administrators also have the option of creating a new contact at this point. ⊕
    - By clicking the plus sign button (located above the contact field) you will be redirected to the contacts module where you can then create the new contact. Once you click the Save button within the contacts module, you will be redirected back to the task creation page to continue your work.

9 Check the **Mobile** checkbox to designate if the end destination for the task is mobile friendly. [Optional]

- Please note, if the mobile friendly box is checked a publisher will be required to provide a mobile friendly screenshot in addition to the desktop screenshot required below in Step 21.
- If the publisher does not check this at the time of task creation, OneCampus will show the task as not mobile friendly (by default).
- You have the option to disable this functionality altogether under Advanced > Settings > Mobile Friendly Enabled.

10 Enter a **Location Map URL**. [Optional]

- Entering a URL here will add a "map pin" to task tiles.
- This field will accept any URL (for example a URL to a PDF version of your campus map or a URL to the Google Map of your Health Services building).
- When added, a "map pin" icon will appear to the left of the information icon on the task tile as well as to the left of the heart icon on the top of TDP's.
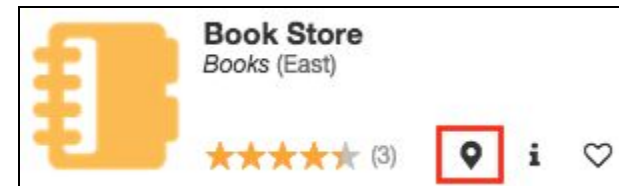
11 Enter the **Latitude** and **Longitude** coordinates for this task. [Optional]

- Entering Latitude and Longitude coordinates in these fields will enable location data, causing this task to display in the "Near Me" category for your end users. (If the "Location Map URL" uses a Google Maps link that has the Latitude/Longitude embedded in it, the system will use that automatically)
- In order for the location data to work, the "Browse by Location" feature needs to be enabled beneath Advanced settings.
- You can obtain Latitude and Longitude coordinates from most major web mapping services, such as Google. (Just right click on the map and choose "What's here?". You should see the Latitude/Longitude like this: "33.464224, -111.923180")
- If a location map URL was provided in step 10, that will override any Latitude/Longitude coordinates that are provided when the user clicks on the map button, but the Latitude/Longitude will be used for distance.

12 Check the **Task Center Visibility** box if you want this task to be visible only within a task center. [Optional]

- Checking this box will render this task invisible except if it is included in a task center.
- End users will not be able to search for or find it on the main store page.
- End users will still be able to favorite this task.

13 Enter a **Description**. [Required]

- Keep the description of the task as short and simple as possible but make it clear what the task does or is used for.
- Options to bold, italicize, hyperlink and bullet are available .
  - Please note, before you are able to use any of the description markup or preview functionality, HTML descriptions must first be enabled by clicking Advanced > Settings > Features > Html Descriptions Enabled.

14 Enter a **Meta Description**. **(Search Engine Optimization)** [Required]

- This is a very brief summary of the task (Max 155 characters) and can be similar to the Description (Step 13). This text will be displayed to users when using search engines such as Google or Bing.

Important: Meta Description must be unique to each task. Your campus marketing or web services team may be a good resource for help with SEO language.

15 Select a **Status** OR **Date Range** for this task. [Optional, however, will default to active if a selection is not made]

- If **Status** is selected, the Publisher is opting to set a status of active or inactive for the task. (Active = live on the site, Inactive = not live on the site)

Active Dates/Status (currently active)

Specify by Status
Specify by Date Range

Status

Active

- If **Date Range** is selected, the Publisher is opting to set a specific date range that this task will be visible. The system will automatically derive the status from the dates that you input.

Active Dates/Status (currently active)

Specify by Status
Specify by Date Range

Begin Date

End Date

16 Enter a **Version Number** and **Release Notes**. [Optional]

- **Version** - the software version or an internal number of choice. Using this field is, will reset ratings and comments. Old reviews/ratings will be archived for later review but no longer calculated in the task's rating.
- **Release Notes** - any special notes regarding that particular version you would like to call out to users

17 Enter a **Unique Key**. [Required]

- The Unique Key may only contain lowercase letters, numbers, and/or dashes (no spaces).
- The Unique Key will become part of the URL for the Task Details page and is important for Search Engine Optimization (SEO).
    - You may also use the green "Convert Task title to key" button to generate a unique key based off of the Task title.

18 Select a **Stat Recording Type**. [Optional]

- If a user is logged in, stats are compiled automatically. Select "Anonymous" if you don't want to track by login.
- If a task is set to Anonymous, it will not be captured in the Recently Used Tasks for a user.

19 Select a **Publisher**, if applicable, from the dropdown. [Required]

- Use this field to choose what person or department is creating/requesting this task. This field is used when you have established a distributed publishing process. Otherwise this field will not appear.
- Administrators also have the option of creating a new Publisher at this point.
    - By clicking the plus sign button (located above the Publisher field) you will be redirected to the Permission Groups module where you can then create the new Publisher. Once you click the save button within the Permission Groups module, you will be redirected back to the task creation page to continue your work.

20 Use the radio buttons to **Upload a custom image** or **Select An Image from current library**. [Required]

- This step determines the image that will appear on the task tile.
- To **Upload an Image**, click the **Upload Image** button and upload a high resolution image that is 153x153 pixels (PNG or JPG).
    - **Please note**: The sizes are very specific will not load if they are outside the parameters or in an unacceptable file type.

- If using the **Select an Image from current library** option, you will be able to access previously loaded images from a drop down. (see the Shared Task Images Quick Guide for instructions).
- Administrators can disable the ability for Publishers to upload an icon at the time of task creation by clicking Advanced > Settings > Miscellaneous > Publisher Upload Icon Images Enabled and changing that setting to "no". Regardless of this setting, Administrators will still have the option to upload an image at time of task creation.
- Administrators also have the option of creating a new image at this point. ⊕
  - By clicking the plus sign button (located above the choose an image field) you will be redirected to the shared task images module where you can then upload the new image. Once you click the save button within shared task images module, you will be redirected back to the task creation page to continue your work.

21 Upload **Screenshots** and/or a **Video**. [Required]

- By uploading an image (screenshot) or video tutorial, users can see what the task will look like or how to use a particular task when they click on it.
- Please note, if the mobile friendly box in Step 9 is checked you will be required to provide a mobile friendly screenshot in addition to the desktop screenshot in this step.
- Administrators can disable the requirement for screenshots in this step by clicking Advanced > Settings > Miscellaneous > Screenshots Required and changing the setting to "no", if you do not wish for screenshots to be required in order to publish a task.

To add a screenshot:

- If using a Mac:

  - Press Command-Shift-4 and your cursor should turn into a crosshair pointer.
  - Select the area you wish to screenshot and release the cursor.
  - This should take a "picture" of that area and automatically place the image on your desktop.
  - Click "**Upload Image**" and browse for the file (again it should be on your desktop).
  - Select the image and a preview should appear under the Screenshots & Videos section of the New Task Definition page you are working on.
  - Please note that the above is just one way to capture a screenshot on a Mac. There are several others including but not limited to using Mac's Grab (found under Finder > Applications > Utilities > Grab).

- If using a PC:

  - Press the Windows logo key & PrtScn key (at the same time).
  - The screen will dim for a moment while it is being copied and will save the "picture" as a file in the Screenshots folder (which you should find in your Pictures folder).
  - Click "**Upload Image**" and browse for the file (again it should under Pictures > Screenshots).
  - Select the image and a preview should appear under the Screenshots & Videos section of the New Task Definition page you are working on.
  - Please note that there are several other ways to capture a screenshot using a PC. For example, if you have Windows Vista or higher you can use the Snipping Tool (found in the Accessories folder in the All Programs menu).

- From your iPhone:

  - Display what you are trying to screen capture on your phone.
  - Press and hold the "Sleep/Wake" button, then press the "Home" button.
  - The screen will briefly flash white as it takes the screenshot.
  - The screenshot will be automatically saved as an image on your Camera Roll.

- From your Android:

  - Display what you are trying to screen capture on your phone.
  - Press and hold the "Sleep/Wake" button and the "volume down" button simultaneously.
  - Hold both of these buttons down until the screen flashes.
  - A notification will appear in the drop-down bar at the top of the screen giving you options to delete, share or edit the image.

To link a video to your task:

- Go to the video you want to link and copy the "Embed" URL (please note, you must use embed URLs as the regular YouTube URLs are blocked for site security reasons).
- Click on the **+Link a Video** button within OneCampus on the New Task Definition page.
- Paste the text into the URL field (example: <iframe width="854" height="510" src="https://www.youtube.com/embed/TwYVf6HW48s" frameborder="0" allowfullscreen></iframe>)
- Delete everything before and after the "src" attribute (so what remains looks like this, https://www.youtube.com/embed/TwYVf6HW48s)

- If desired, add a thumbnail of the video by clicking **+Upload Image**
  - Uploaded image must be exactly 100 x 100 pixels
  - This thumbnail will appear in the thumbnail gallery/bar area of the task detail page. **If you link to a YouTube or Vimeo video and do not upload a thumbnail, the thumbnail will be automatically generated**. If you link to another type of video and do not upload a thumbnail, a default filmstrip icon will appear as the thumbnail for your video.
- Click **Save**
  - If the video embeds successfully, you will see a preview of the video under "Screenshots and Videos" - otherwise you will see a blank white box and only a delete button. If this is the case, you will need to delete the video and try again with the correct URL.

To link an image to your task: This will allow you to enter the URL of an image you would like to pull into the screenshot and video area of the task detail page (vs. uploading the image)

- Click **+Link an Image**
- Copy and paste the image URL into the pop up window
- Click **Save**

22 Select the **Campus(es)** (may be called something else depending on your settings) this task applies to. [Optional]

- The default is "All Campuses" but you can add one or more to assist with filtering.

- Administrators have the option of creating a new campus at this point. ⊕
  - By clicking the plus sign button (located above the choose a campus field) you will be redirected to the campuses module where you can create a new campus. Once you click the save button within campuses module, you will be redirected back to the task creation page to continue your work.

23 Select the **Role(s)** that apply to this task. [Optional]

- The default is "All Roles" but it is helpful to identify the users so they can sort tasks by Role (e.g. faculty or parent).
- Administrators have the option of creating a new role at this point. ⊕

○ By clicking the plus sign button (located above the choose a role field) you will be redirected to the roles module where you can then create a new role. Once you click the save button within the roles module, you will be redirected back to the task creation page to continue your work.

24 Choose the **Category/Categories** that apply to this task. [Required]

- Administrators have the option of creating a new category at this point.
  ○ By clicking the plus sign button (located above the choose a category field) you will be redirected to the categories module where you can then create a new category. Once you click the save button within the categories module, you will be redirected back to the task creation page to continue your work.

25 Click the **Choose Tags** button and choose the applicable Tags. [Optional]

- You can "hide" a tag so it doesn't display in the Task Definition Page, but will still show up in searches for that term.

- Administrators have the option of creating a new tag at this point.
  ○ By clicking the plus sign button (located above the choose tags button) you will be redirected to the tags module where you can then create a new tag. Once you click the save button within the tags module, you will be redirected back to the task creation page to continue your work.

26 If applicable, enter an **Active Content Public URL**. [Optional]

- This field is to be used for tasks where you wish to display a live JSON feed (i.e. weather, classified ads).
- See the Quick Start Guide called Active Content Task Setup for additional instruction.

27 Check the box for **Active Content Authentication** if you wish to execute Active Content only when a user is logged in. If checked, public content will not begin scrolling on the task tile until a user authenticates. [Optional]

28 Use **Update Frequency** to enter the number of seconds that you would like a tile to refresh its Active Content (live JSON feed) after the tile has been displayed. [Optional]

29 Enter an **API Key**. An API key will be required for authorized feeds. For example if the feed will include sensitive, user-specific data, such as PTO hours or money that remains on an end user's campus dining plan, then you should provide an API key. If the feed will contain general data, such as open hours for a store location or the daily weather, then you do not need an API key. If an API key is

provided, we will encode a user parameter in the request that will be made up of the "username|timestamp" as well as provide a parameter in the request called timestamp to verify the encoding.

- We have provided a **Generate Key** button on this screen to generate a 128-bit API key for you, if need be.

- Use the **Test** button to verify that the active content is being retrieved correctly.

- See the Quick Start Guide called Active Content Task Setup for additional instruction.

30 Choose a **Tile Height** preference from the drop down. [Optional]

- Normal = Five pages, up to six lines of content per page, one **line** at a time.
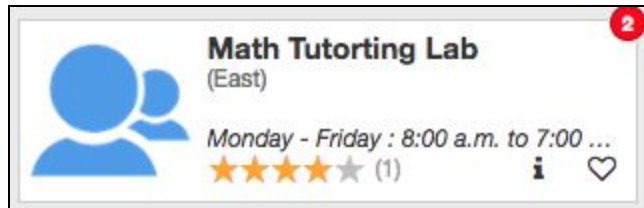
- Double = Five pages, up to six lines of content per page, one **page** at a time.

31 Enter **Social Media** URLs that apply to this task. [Optional]

- Indicating links to social media in this step will cause the corresponding social media icons to appear on the task details page, beneath the task contact information.

Contacts

Help Desk Team
Joe Helpdesk

Help Desk Team
Joe Helpdesk
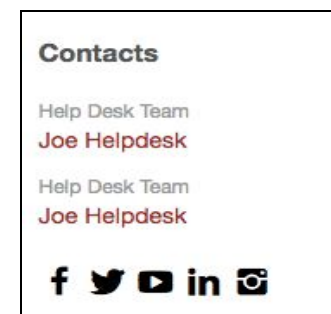
32 Add any notes that you would like to remember for this task in the **Memos** section. [Optional]

- Notes entered into this section are NOT displayed on the task details page.
- These notes will remain in this section and will be visible when editing the task.
- Content in the memo section is included in the task CSV export.

33 Click **Save** or **Submit** at the bottom of the screen. [Required]

- Administrators have the ability to "Save" a task so it can go live immediately.
- Publishers will need to "Submit" a task to be routed to an administrator for approval.

IMPORTANT: If you click **Cancel**, it will delete everything you've done up to that point UNLESS you are editing an existing task. In that case, Cancel will return you to the previously saved version and will not delete the task.

Repeat the above steps for each new task. Or, return to the Tasks list to **Edit**, **Remove or Copy** an existing task.

By default, tasks are listed alphabetically. You can use the internal search bar to find the task you are looking for or click the "See More" button at the bottom of the page.

Notes:

- *Tenant data for tasks can be exported into a CSV file. The "Export Tasks" button can be found in the upper right hand corner of the tasks page. Data can be exported for the current page (just the items showing) or all pages, where applicable.*
- *You can edit tasks with similar data elements in bulk by clicking the **Bulk Edit Tasks** button that is located on the tasks page.*
  - *The bulk editor will allow you to select the tasks that you want to edit as well as the specific data elements that need updating. Easily update up to 13 different data elements such as contacts, roles, category, image and more.*