

14R2 Enterprise Task Management

Enterprise allows users to create **Tasks** as well as offering system generated **Tasks** like "Unfilled Order", "Order Confirmation", "Send Resume to Supervisor", "I-9 Alert", etc.

The screenshot shows the TempWorks Enterprise interface. On the left, a sidebar displays the user profile for Tammy L. Devereaux and a 'tasks' panel. The 'tasks' panel is highlighted with a red box and contains a list of tasks:

- Set up interview for Tammy
- Candidate Follow-up
- Send Resume to Supervisor
- Send Resume to Supervisor
- Send Resume to Supervisor
- Unfilled Order

The main area shows an 'employee snapshot' for Tammy Devereaux, including contact information, hire status, and a list of messages. Below the messages is an 'assignments' table:

Title	Customer	Code	Start	End	Bill	Pay	Dept
C#	Crom Equipment	Open	3/14/2010		0,000.00	0,000.00	Accounting
Unknown	Crom Equipment	Open	2/24/2010		\$18.15	\$15.00	Accounting
Unknown	Wildcreek Golf C...	Open	2/18/2010		\$0.00	\$0.00	Primary
Warehouse Person	Dans Cleaning Se...	Open	12/8/2008		\$13.79	\$9.00	Primary
Forklift	123 Nursing	CO	10/1/2008		\$12.34	\$10.00	assembly
Account Analyst	Creative Intentions	Open	11/5/2007		\$15.00	\$12.50	Human Reso...

At the bottom right of the interface, it says 'You have 12 alerts.'


The **Tasks** that are "Unassigned" for your **Branch** or "Assigned" to you specifically, will be displayed in the lower left corner of the **Main** screen. **Tasks** with a future *Due* date will match the background. Double-click on a **Task** to open and view the full *Task Details*. If a **Task** is *Due* today or overdue it will turn **red** as shown below:

This close-up shows the 'tasks' panel with the first task, 'Out of office this morning', highlighted in red. A context menu is open over the 'Unfilled Order' task, showing options to view details for the employee (Devereaux, Tammy), the customer (Crom Equipment), the order (Order 5292 Crom Equipment), and the employee's location (Devereaux, Tammy L).

If a **Task** is linked to a record or records, right-clicking on the **Task** will display a menu like the one on the left. Click on a record to navigate to it.

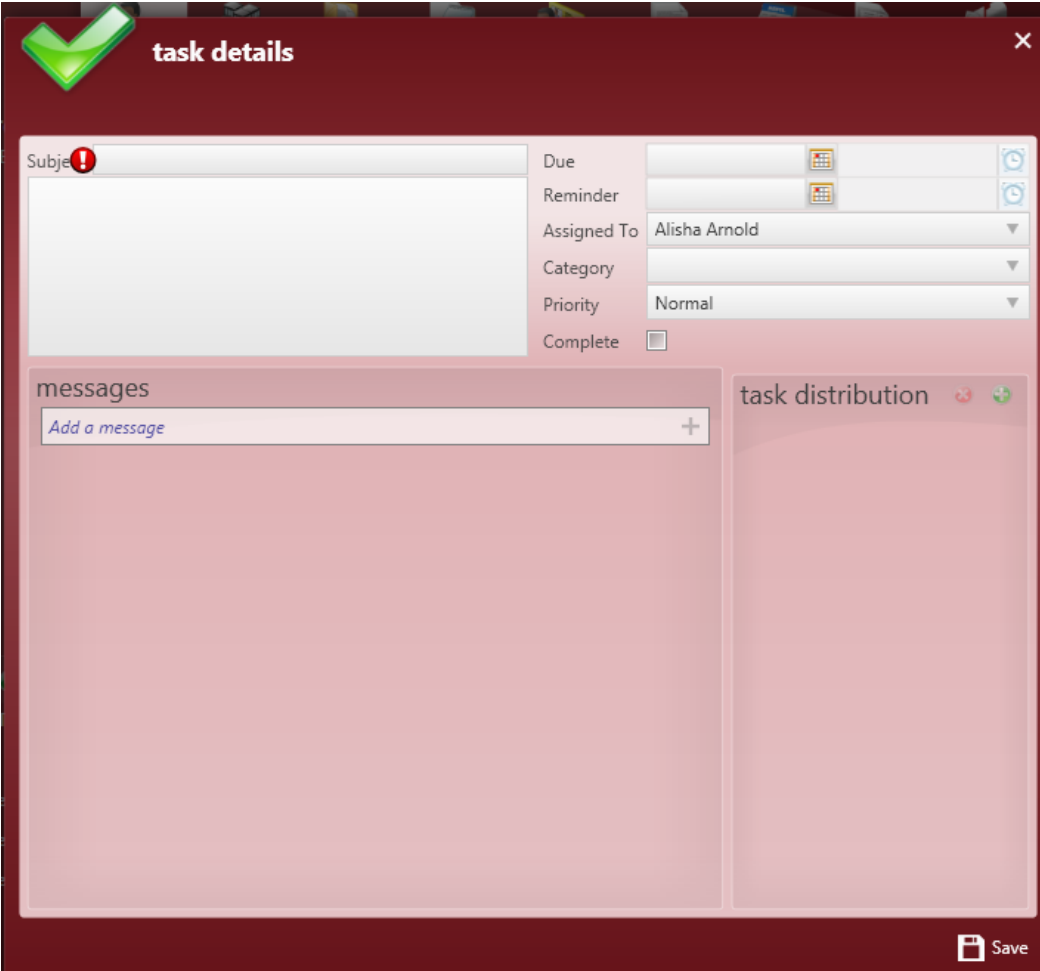
To mark a **Task** as "Completed", simply click in the check box at the beginning of the **Task** line.

There are several different ways to create new user-generated **Tasks**.

1. Click on the  button in the **Tasks** area.
2. If you have the record open in which you want to create a task for, click on the avatar area and drag it down to the **Task** box. A new task box will then be displayed.
3. Select the *Actions* drop down menu within the record you want to create a task for and select *New Task*.
4. **Tasks** can also be created from a new *Message* when *Create a Task* is selected from the Follow-up section.

All of the different ways to add **Tasks** will be described in detail in the following pages.

The first way to create a **Task** is by clicking on the  button in the **Tasks** area. This will open the view below:

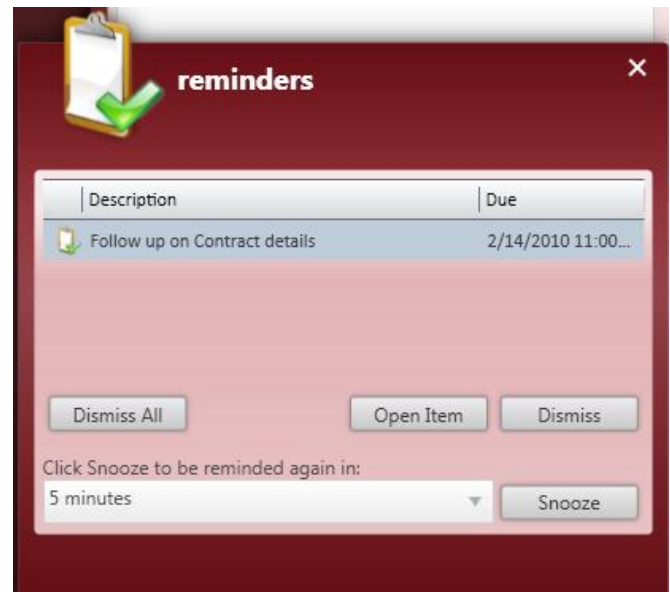


The *Subject* is the only required field in this form. Enter the *Subject* and any other misc. text in the text box below it. You have the option to create a *Due* date and time, as well as a *Reminder* date and time. The *Assigned To* will automatically populate with your *Username* as the user that is creating the **Task**. To assign this **Task** to another user select their name from the drop down. Select a *Category* and *Priority* for filtering purposes in the *Task Manager*. Once all of the *Task Details* have been entered, click on *Save* to update.

*Note – Do not click in the box for *Complete* until the **Task** has been accomplished and the follow up reminder is no longer needed. Once the **Task** is no longer needed, open it to the *Task Details* form and click in the *Complete* box. Then click *Save* to update.

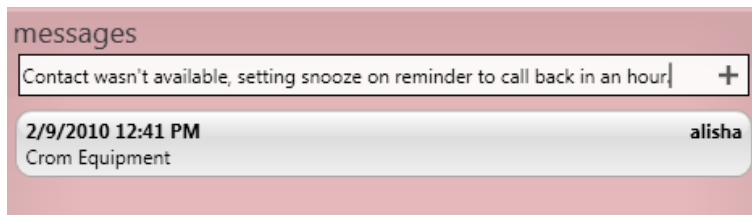
If a *Reminder* is set, a *Reminders* form like the one pictured to the right will appear at the selected date and time.

Highlight the *Reminder* and then select the *Open Item* button to view the **Task** that the reminder was created from. Clicking on the *Dismiss* button will eliminate the *Reminder* and the box will close. If there is more than one *Reminder*, clicking on *Dismiss All* will eliminate all of the *Reminder* items.




If you are unable to complete the **Task** at this time choose the time from the drop down menu and then click *Snooze* to have the *Reminder* come up again at a later time.


*Note – A *Reminder* should only be added if you want to have the *Reminders* prompt form open on your screen at the appointed date and time. Otherwise leave the *Reminder* date and time fields blank.




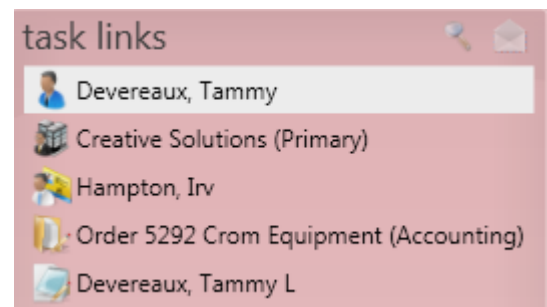
A *Message* can be added to the **Task** so that anyone who is working on it can keep track of their progress and that of others.


Enter information into the open *Message* field and then click on the  button to add it to the **Task**.

When a **Task** is linked to a record or records the record(s) will be listed in the Task Links area on the *Task Details* form.

To navigate to the record, select it and then click on the  button.





To send an outgoing *Email* to an **Employee** or **Contact** that is linked to the **Task**, select the line and click on the  button.



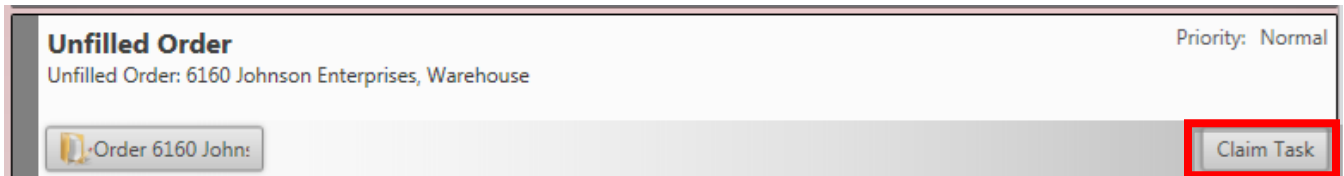
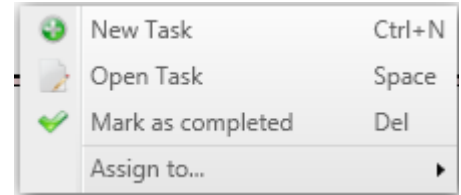
In the Task Distribution section the user can select **Branches** or **Roles** that should receive the **Task** item. Click on the  button to open the form to the right.

Select the **Branches** and/or **Roles** that should be included in the distribution and then click on the *Save* button in the lower right. (To select more than one from the list, hold down the *Ctrl* button on your keyboard as you select)

*Note – Using the Task Distribution functionality means that this **Task** will be displayed in the **Tasks** area in the lower left of the **Main** screen for anyone who is a user in the **Branch(es)** or associated with the **Sec Role(s)** selected.

Click on the  button in the **Tasks** area to open the *Task Manager* as shown above. This form allows users to view other **Tasks** not specifically “Assigned” to them or to claim “Unassigned” **Tasks**. The *Task Manager* has filter options including: *Status*, *Category*, *Assigned To*, *Priority*, *Task Type*, *Branch*, *Due Between*, *Completed Between*, *Security Role*, and *Show Unassigned*. Select information from the drop down menus or calendars to limit the **Tasks** that are displayed then click on the *Find Tasks* button to update your screen. To create a new **Task** from this form, click on the  button. The  button allows the user to open the record to the *Task Details* and the  will mark the **Task** as “Completed”.

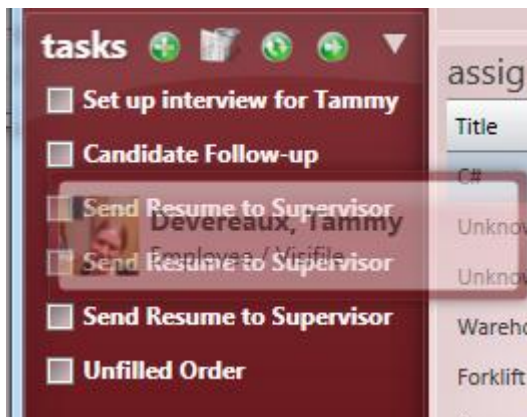
Right-clicking on a **Task** in the *Task Manager* gives options for creating a *New Task*, *Open Task* and *Mark as Completed*. The user can also use the *Assign To* function to reassign the **Task** to another user by selecting their *Username* from the drop down menu that appears to the right of this menu.



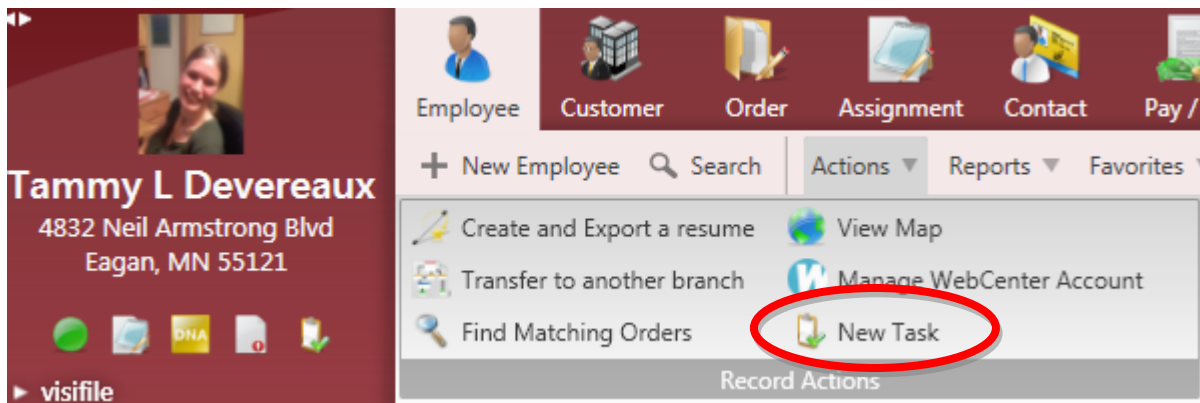
When a **Task** is "Unassigned" it will display in the *Task Manager* with a button to *Claim Task*. Clicking on the *Claim Task* button will "Assign" your *Username* to the **Task** as shown below:





*Note – System-generated **Tasks** are customized for your company. Common types are "Unfilled Order", "I-9 Alert", "Credit Check", "PO Warning", "First day call", etc. System-generated **Tasks** are the only **Tasks** that can be "Unassigned". All **Tasks** created by a user will have at least one user that they are "Assigned" to.

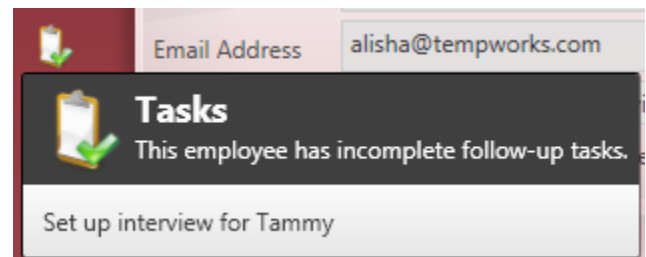




When the record avatar is dragged and dropped into the **Tasks** area the screen will look similar to the one displayed on the left. This will create a new **Task** linked to Tammy Devereux's record.

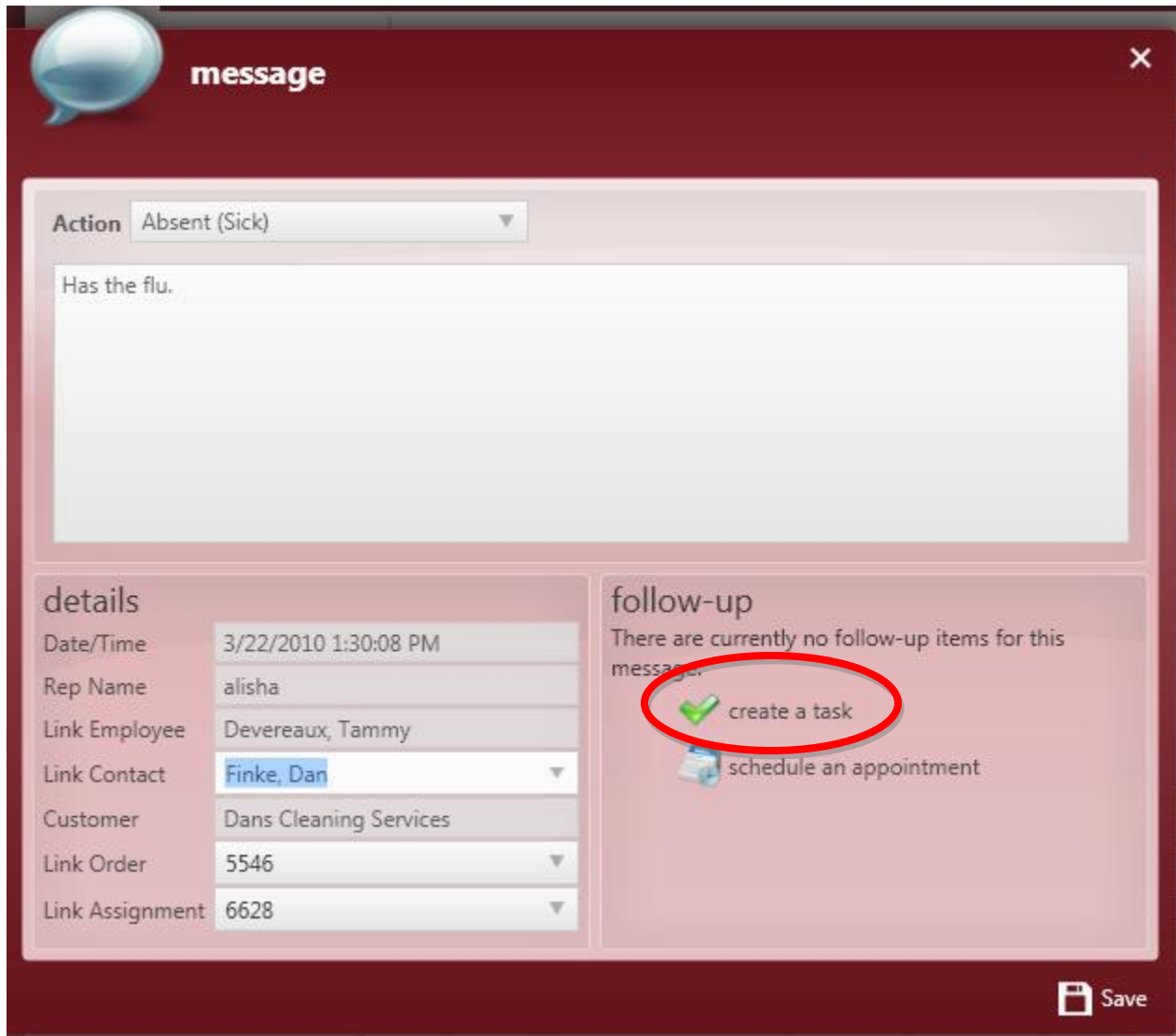


Another way to add a new **Task** is from the *Actions* drop down menu in the **Employee**, **Customer**, **Order**, **Assignment**, or **Contact** records select *New Task* to open the *Task Details* form and add a **Task** that will be linked to that record. When an “Incomplete” **Task** is linked to the record the  icon will be displayed in the avatar area.

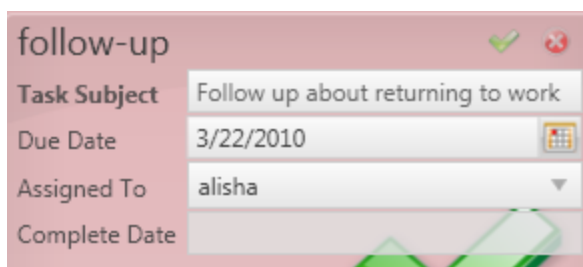
When the  icon is scrolled over, Enterprise will display the outstanding **Tasks** for the record. Click on the line for the **Task** to open the *Task Details* form.






To link a **Task** to an **Employee, Customer, Order, Contact,** and **Assignment** click on the  button for the **Assignment** from the **Employee** or **Order Visifile** forms. Or open the **Assignment Messages** form and click on the  button to add.

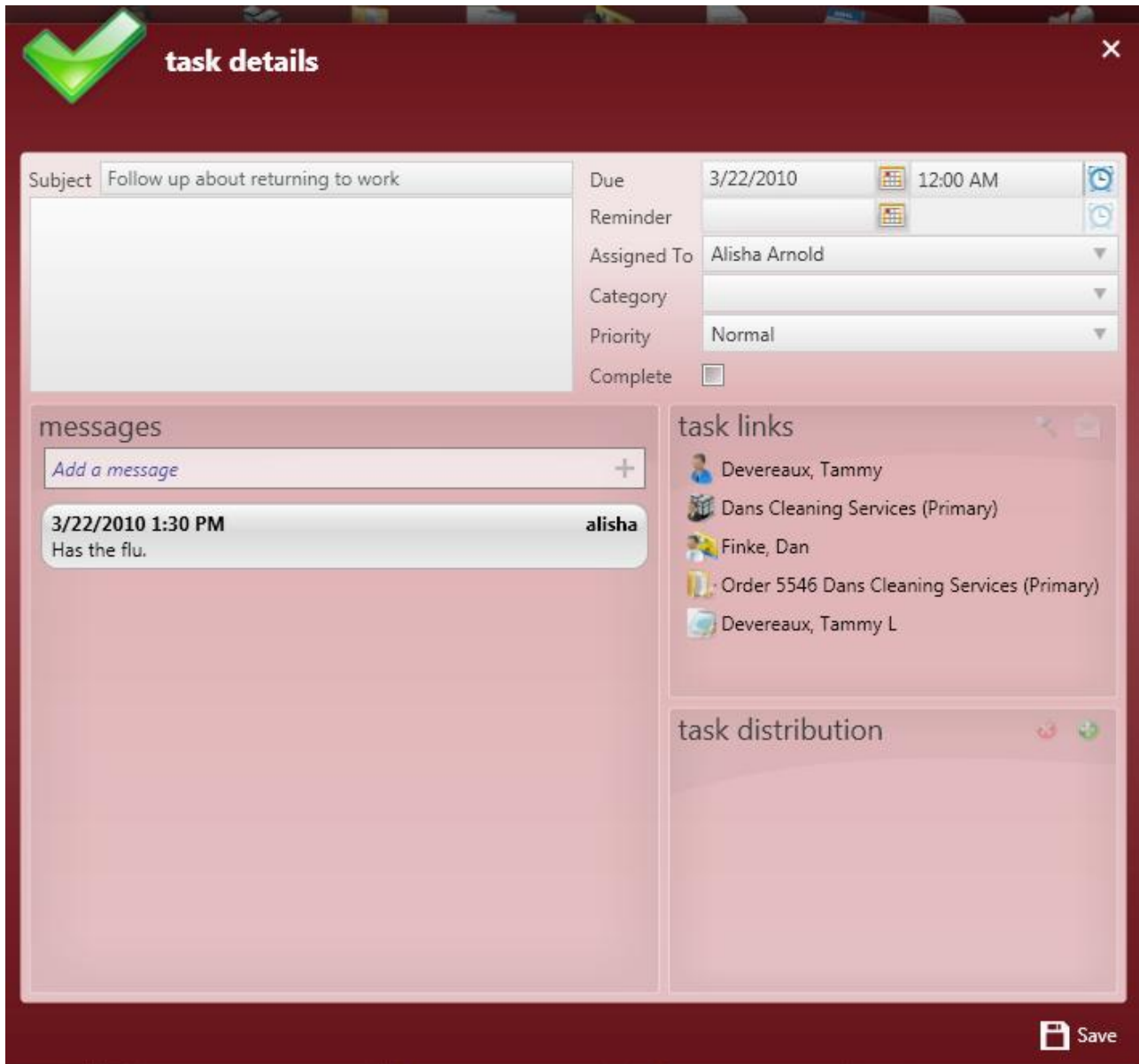


In the add *Message* form above select the *Action* from the drop down menu and enter the *Message* text in the box. This *Message* will already be linked to the **Employee, Customer, Order,** and **Assignment**. To add a **Contact**, select their name from the *Link Contact* drop down menu. In the Follow-up section choose *Create a Task* (as circled) to display the **Task** fields available from the *Message*.



Enter the *Task Subject*, select a *Due Date* and change the *Assigned To* (if necessary). Click on the  button to open the *Task Details* form for this **Task** or click on the  to delete the **Task** from the *Message* add form.

From the **Tasks** area double-click on the **Task** to open the *Task Details* form or click on the  button from the Follow-up section in the *Message* add form.



The *Task Details* form will contain the *Subject* that was added in the *Task Subject* field on the *Message* as well as the *Due* date entered in the *Due Date* field and the *Message* text will be displayed as an entry in the Messages area. Add any additional information needed and then click *Save* in the lower right.

Still Have Questions?

For more information about task management functionality contact our customer support group at 651.452.0366 or by sending an email to support@tempworks.com.

To submit suggestions on how to improve this document or to request documentation on other Enterprise functionality please contact the training department at trainers@tempworks.com.