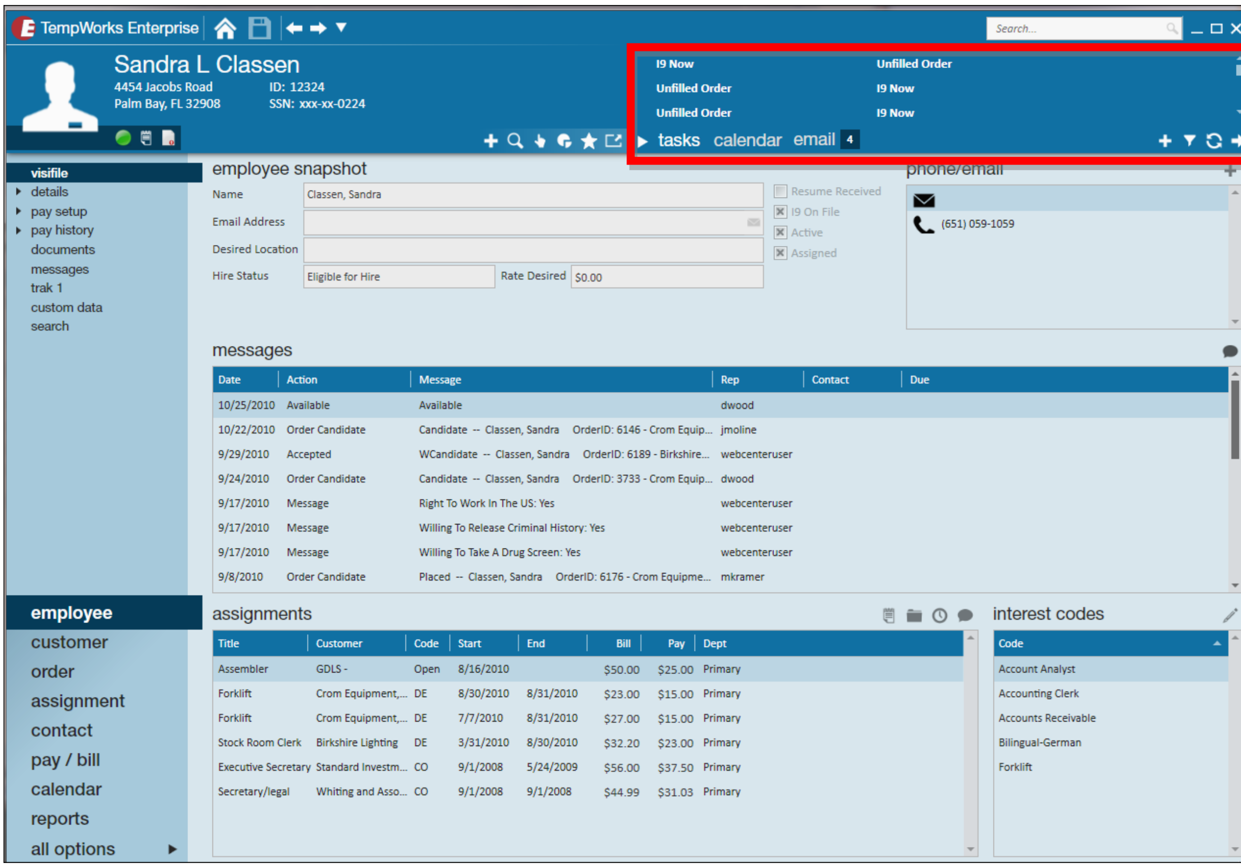
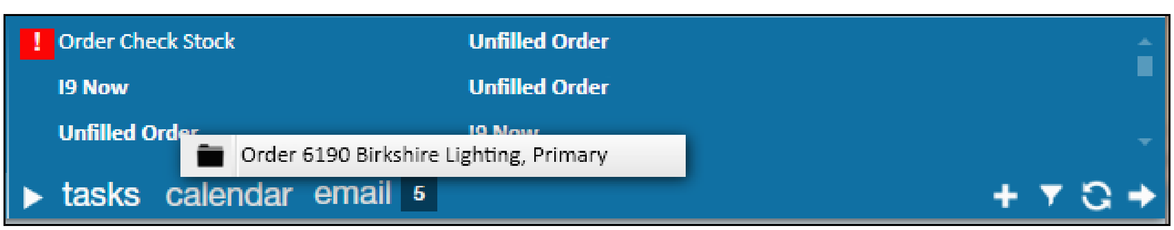
15R1 Enterprise Task Management

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.



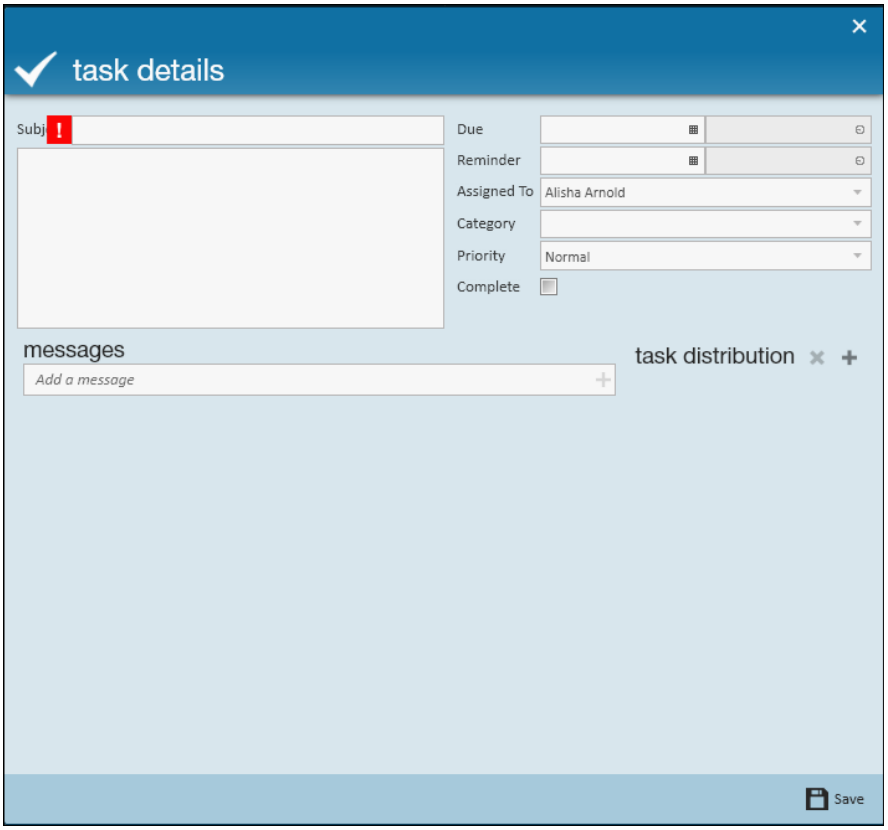
The **Tasks** that are "Unassigned" for your ***Branch*** or "Assigned" to you specifically, will be displayed in the upper right corner of the **Main** screen. **Tasks** with a future *Due* date will match the background. Double-click on a **Task** to open and view the full ***Task Details***. If a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



If a **Task** is linked to a record or records, right-clicking on the **Task** will display a menu like the one above. 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**. Click on the button in the **Tasks** area or on the avatar for the record that's open and drag it over to the **Task** box. A third option is available from the drop down menu where you can select *New Task*. **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:

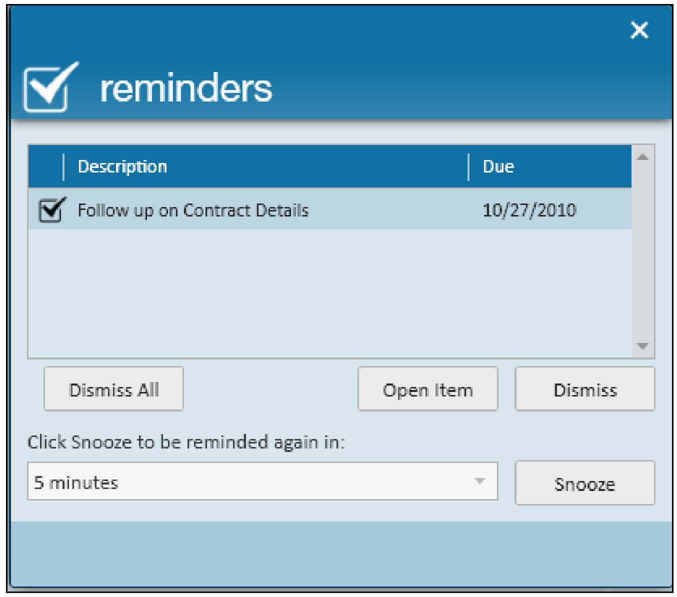


*Note – If the Task Distribution functionality is not displayed on your *Task Details* form it's because your *Sec Role* doesn't give you access to this feature.

The *Subject* is the only required field in this form. Enter the *Subject* and any other misc. text in the text box below it. Add a *Due* date and time. Select 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.

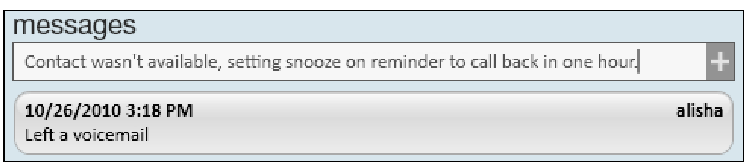
If a *Reminder* is set, a ***Reminders*** form like the one pictured to the right will appear at the selected date and time.



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.

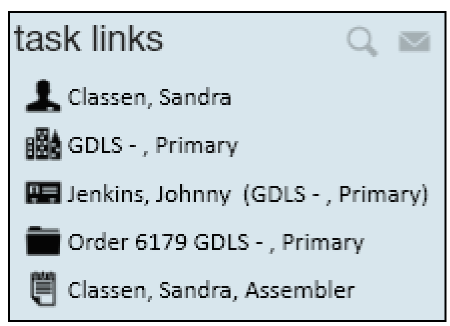
*Note – A *Reminder* should only be added if you want to have the ***Reminders*** prompt form open on your screen at the appointed date and time. Otherwise leave the *Reminder* date and time fields blank.

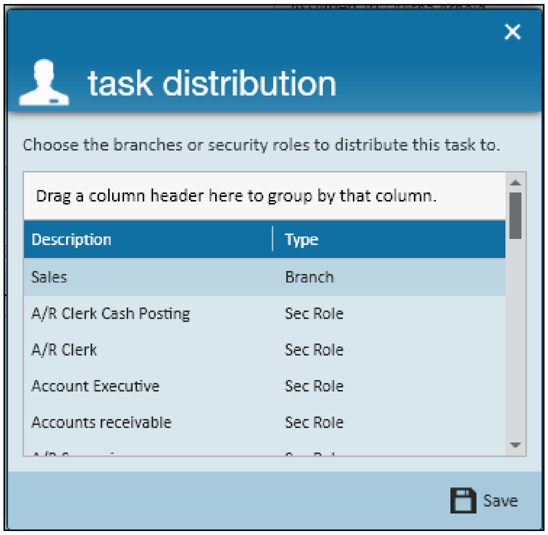


A *Message* can be added to the **Task** so that anyone who is working on it can keep track of their progress and that of others.

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.

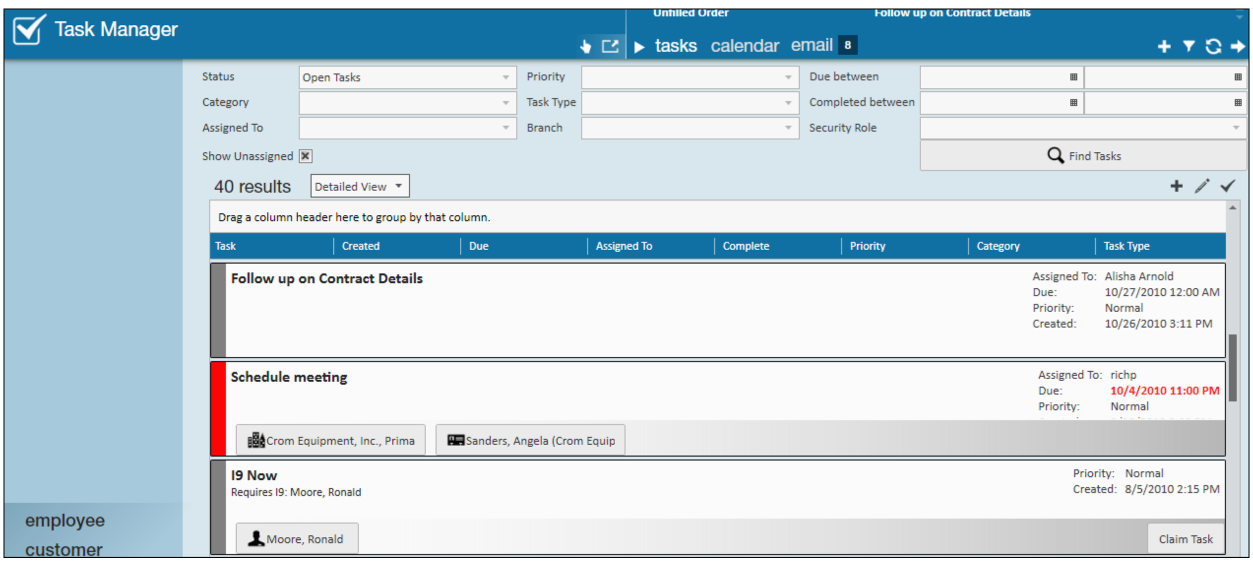




In the Task Distribution section the user can select ***Branches*** or ***Roles*** that should receive the **Task** item. Click on the button to open the form to the right.

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)

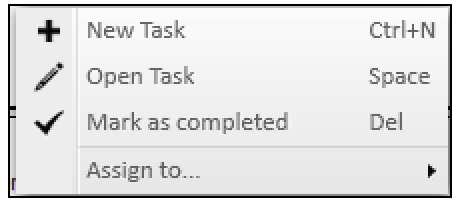
*Note – Using the Task Distribution functionality means that this **Task** will be displayed in the **Tasks** area in the upper right of the **Main** screen for anyone who is a user in the ***Branch***(es) or associated with the ***Sec Role***(s) selected.

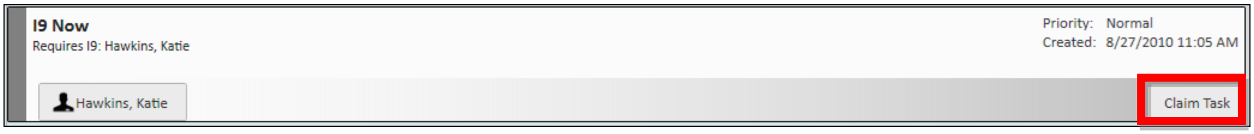


Click on the button in the **Tasks** area to open the ***Task Manager*** as shown above. This form allows users to view other **Tasks** not specifically "Assigned" to them or to claim "Unassigned" **Tasks**. The ***Task Manager*** has filter options including: *Status*, *Category*, *Assigned To*, *Priority*, *Task Type*, *Branch*, *Due Between*, *Completed Between*, *Security Role*, and *Show Unassigned*.

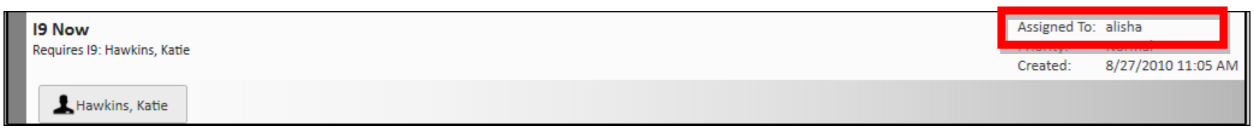
Select information from the drop down menus or calendars to limit the **Tasks** that are displayed then click on the *Find Tasks* button to update your screen. To create a new **Task** from this form, click on the button. The button allows the user to open the record to the ***Task Details*** and the 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.

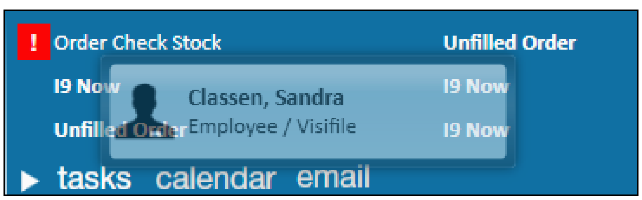




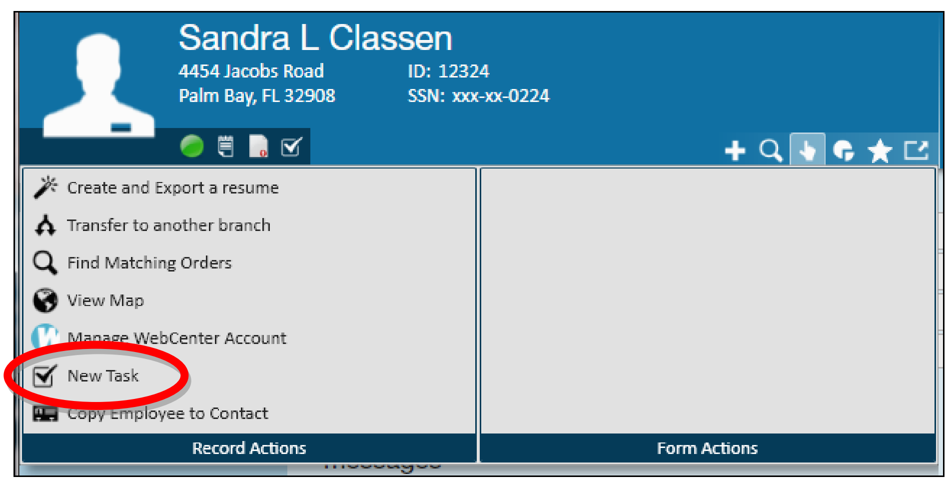
When a **Task** is "Unassigned" it will display in the ***Task Manager*** with a button to *Claim Task*. Clicking on the *Claim Task* button will "Assign" your *Username* to the **Task** as shown below:



*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.

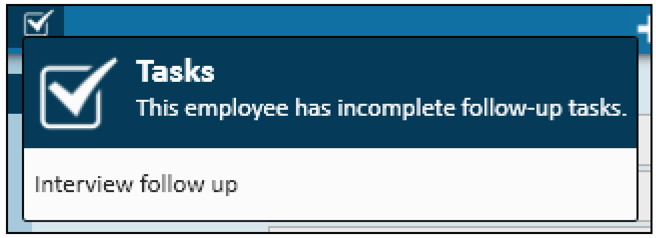


When the record Avatar is dragged and dropped into the **Tasks** area the screen will look similar to the one displayed on the left. This will create a new **Task** linked to Sandra Classen's record.

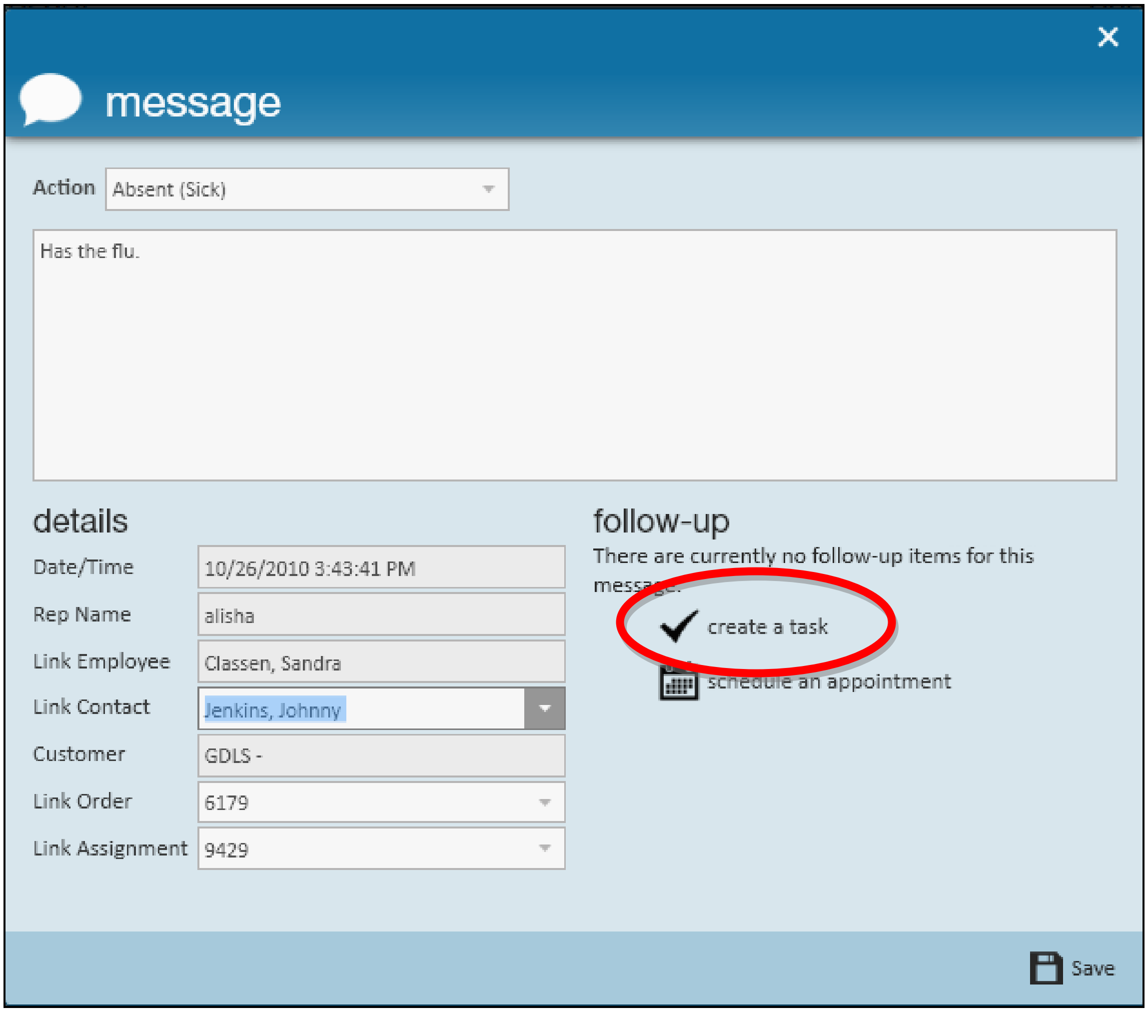


Another way to add a new **Task** is from the drop down menu in the **Employee**, **Customer**, **Order**, **Assignment**, or **Contact** records. Select *New Task* to open the ***Task Details*** form and add a **Task** that will be linked to that record. When an "Incomplete" **Task** is linked to the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

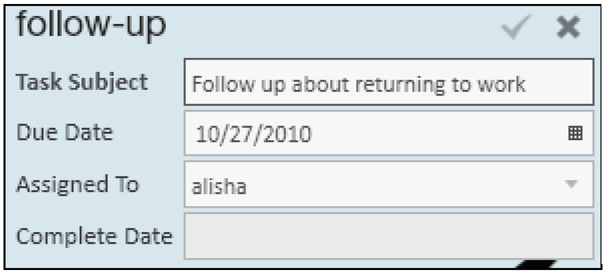
When the icon is scrolled over, Enterprise will display the outstanding **Tasks** for the record. Click on the line for the **Task** to open the ***Task Details*** form.



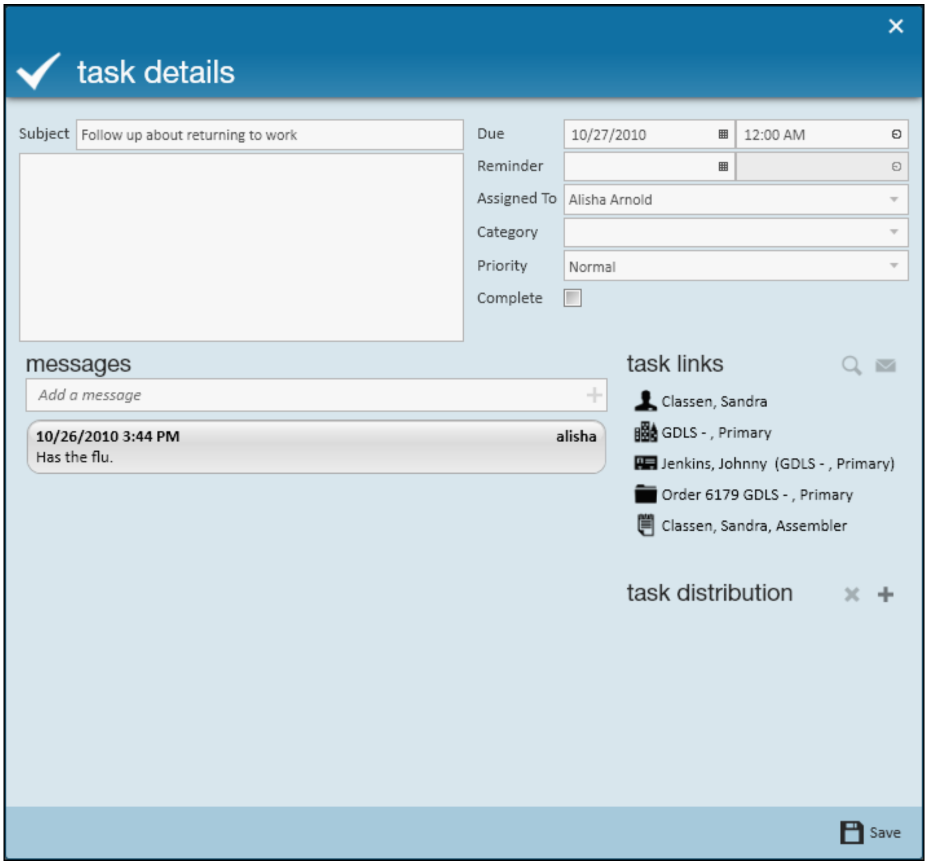
To link a **Task** to an **Employee**, **Customer**, **Order**, **Contact**, and **Assignment** click on the button for the **Assignment** from the **Employee** or **Order Visifile** forms. Or open the **Assignment** ***Messages*** form and click on the button to add.



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 TempWorks Training Department at Trainers@TempWorks.com.