TASK DESK: User Manual

SHUTTLE ENTERPRISE SERVER

Introduction

Task Desk introduces an orderly, controlled way of working. SHUTTLE will allow you to work with or without the Task Desk, but there are many benefits to the use of the Task Desk, including -

Knowing exactly what still needs to be done, and by whom
Knowing exactly what has been done, when and by whom
No chance of overlooking or forgetting Tasks to accomplish
Automated Task Flow Control, e.g. Document or Procedural Controls, Month End Routines, etc.

Purpose of the Manual

The purpose of this User Manual is to introduce you to the use of the SHUTTLE Task Desk.

The Task Desk Manual is presented in 4 parts.

a) Use of the Task Desk (current Document)
b) Use of Task Profiles
c) Use of Task Schedules
d) Use of Task Triggers

What is it?

The Task Desk is a highly sophisticated management system to organize and control Tasks, and is fully integrated to the Application Environment. Tasks may originate from Application Task Triggers, from Task Schedules, from the Diary System, from Alerter, from CRM, and by being submitted either manually by yourself for yourself, or submitted by someone else for you to accomplish.

The Management structure for Tasks is flat. We discern a hierarchy of only 3 levels: Executive, Supervisor and User. Executives and Supervisors may accomplish anything that a User may, but have other privileges in addition. For instance, a Supervisor may re-assign certain Tasks, moving responsibility from one User to another (excepting Private Tasks!), whereas Executives may 'see' all non-private Tasks, and have special 'Sign Off' rights. A User cannot access Supervisors' Tasks, nor can a Supervisor access Executives' Tasks. Each User in the system may be assigned a Task Status Level in this hierarchy.

The Task system exhibits many entry points, and can be reached from all Screens, from HowDoI, from Wizard and from the Menu system. In this Manual, we will present the visual Graphic Wizard entry point.

The Task options are presented 'en route' fashion. The 1st option is in fact a choice that allows you to exit this Wizard and enter the Menu system, accessing the Task options from there.

We list the other options in the sequence presented, with a short description of each :-

Set Preferences
This option is used to set Criteria about which Tasks to select, i.e. which Project, for which Users, etc.

Refresh Task List
This option selects the Tasks that fit the criteria on your current Preference Settings.

View Tasks
A List of the currently selected Tasks.

Work
Offers the Currently Selected Task list, and you select which Tasks to perform Work on.

New Task
Used for Manual Task Submission.

Edit Task
Used to change Parameters on an existing Task, as selected from the Current List.

Sign Off
Although there are many seamless 'Sign Off' options available while Working with Tasks, this option specifically allows you to select Tasks from the current list, for Sign Off.

Check Progress
This option ignores the current active Task List, and allows you to set specific Task Selection Criteria to be measured with regards to Progress towards completion.

Task Profiles

Is the option that leads to the various functions for managing Task Profiles, which is discussed in detail in the 2nd Manual in this series.

List Active Tasks

Ignores the current active Task list, and offers Report Options on Tasks that are still outstanding.

List 'Done' Tasks

Offers Report Options on Completed Tasks.

Task Flags

Task Flags are used when you want to apply ALERTER to Tasks (also see the Alerter User Manual). There are PRIVATE (for your exclusive use) as well as SYSTEM Task Flags.

Schedules

Schedules are like 'trays' of pre-formatted Tasks that are periodically launched, and by using Schedules life is so much simpler. Schedules are explained in the 3rd Manual in this series.

Master File Updates

Here you will find Updates for the Task Master Files, including Projects, Groups, Assignment Links, Triggers, etc. (Task Triggers, 1 of the options found here, is discussed in the 4th Manual in this series.)

Master File Enquiries

These are the 'look only' equivalents of the Master File Updates.

Master File Reports

These are the Report options on the Master Files.

Control Parameters

This option is used to switch the Task Scheduler ON or OFF. When it is OFF, Task Triggers will NOT launch Tasks, but all other Task Submission options remain valid.

Housekeeping

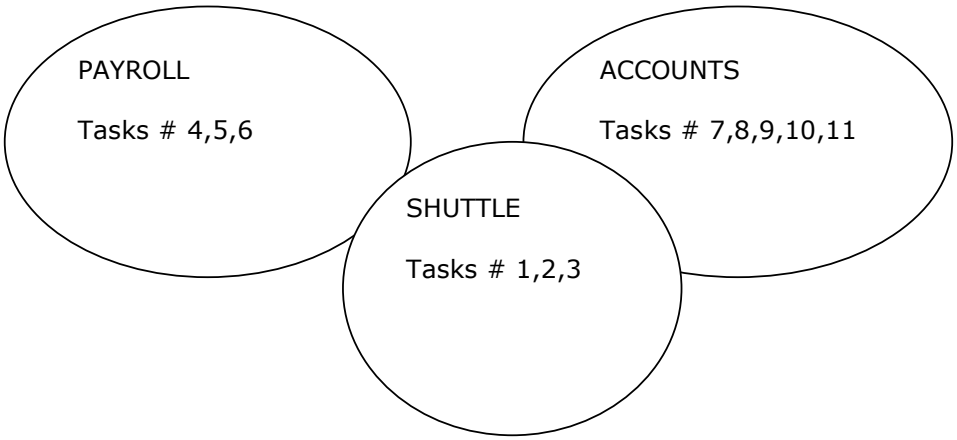
There is no Housekeeping of Task Data required, since it is all automated and done by the system.

Let us then take a closer look at each of these options to be discussed in this Manual, excepting only Task Profiles, Task Schedules and Task Triggers, which are discussed in Manuals 2, 3 & 4.

Set Preferences

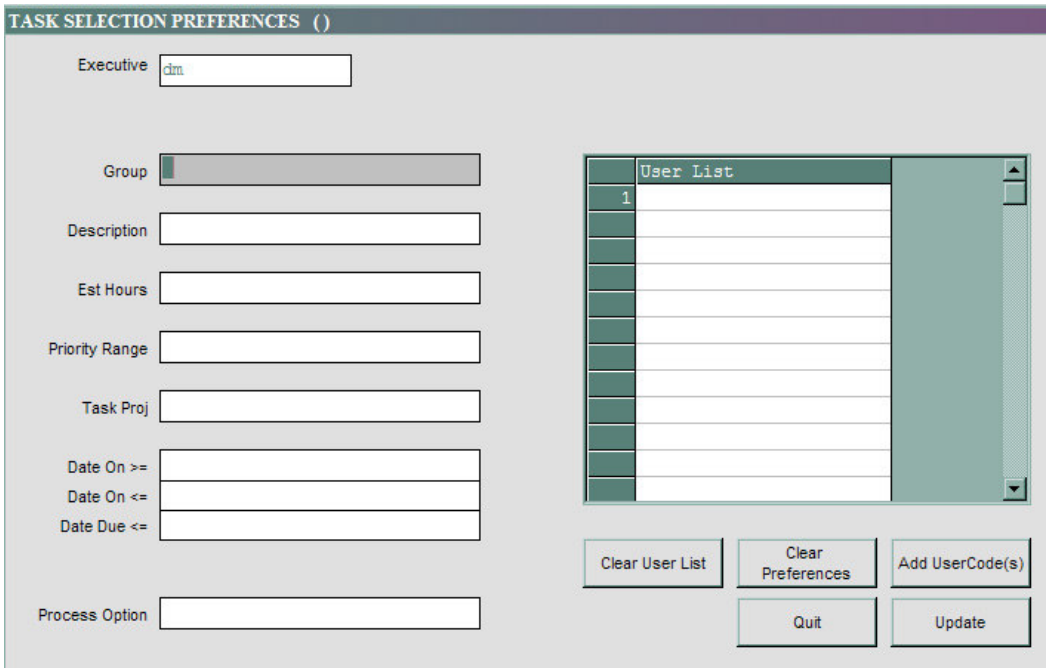
This option is used to set Criteria about which Tasks to select, i.e. which Project, for which Users, etc.

It is important to understand that each DataMart 'owns' it's own Tasks.



In the picture above, we should note that when we are working in SHUTTLE, Tasks # 1,2,3 are visible, but the others are not. While working in PAYROLL, we cannot work with Tasks # 1,2,3. Instead, we may have 4,5,6.

Apart from a Task being owned by a specific DataMart, each Task also has other attributes which distinguishes it from, or groups it with, other Tasks. We observe that a Task has a Description, belongs to a Task Project, has a User who is Responsible to complete it, and so on. Now let us look at the Preferences Screen.



The example shown above is perfectly valid, i.e. with no Detail specified. This simply means that when user 'dm' performs REFRESH TASK LIST, then all Tasks accessible to him / her will be selected, excluding Tasks for other Users, since no Users have been specified. (When no Users are specified, then SELF is assumed.)

However, the User may specify 1, some or all of the available Fields to indicate which Tasks he / she is interested in at the moment. For instance, without specifying any of the other Fields, if a "Date Due" is specified, then the system will only select Tasks with a Due Date (as in 'due for completion by date') <= the Date specified.

All of these Fields have on-line Help, and you can experiment with them all.

Selection Preferences may be changed at any time, or cleared to NULL (as in the example above), and the latest state of the Preferences will be applied when you choose REFRESH TASK LIST.

Refresh Task List

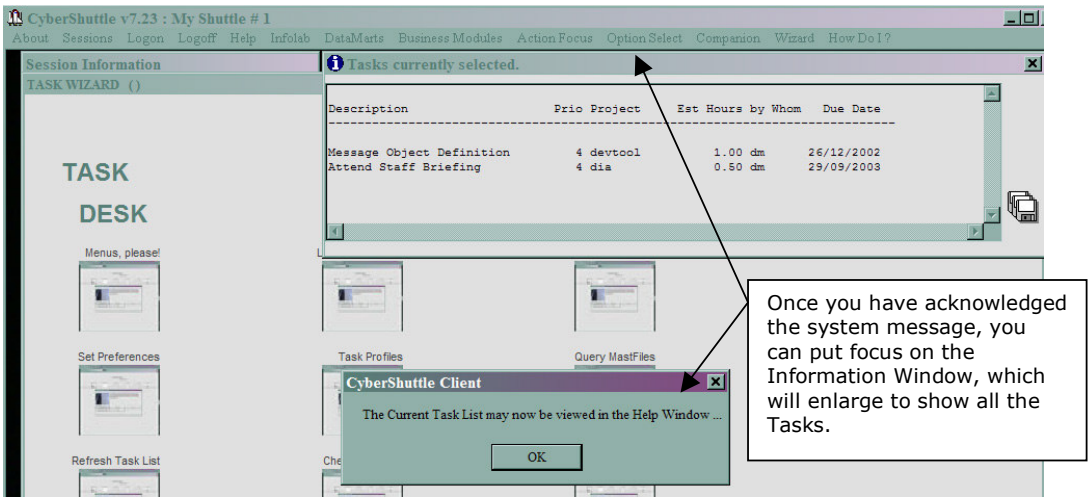
This option selects the Tasks that fit the criteria on your current Preference Settings.

When the option is performed, the system will select Tasks according to current Preferences, and advise as shown above.

View Tasks

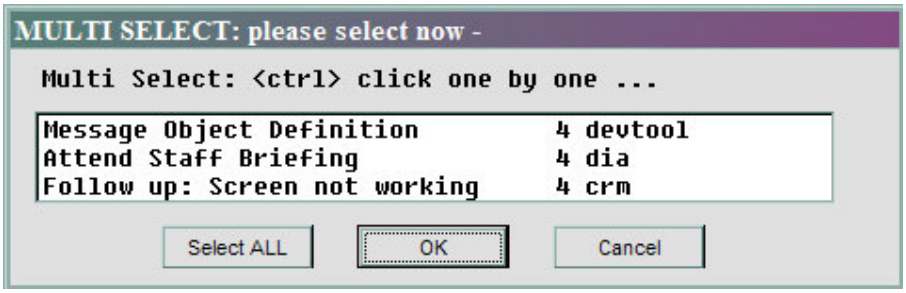
A List of the currently selected Tasks.

If you are curious as to what the system has selected when you perform REFRESH TASK LIST, then choose this option.

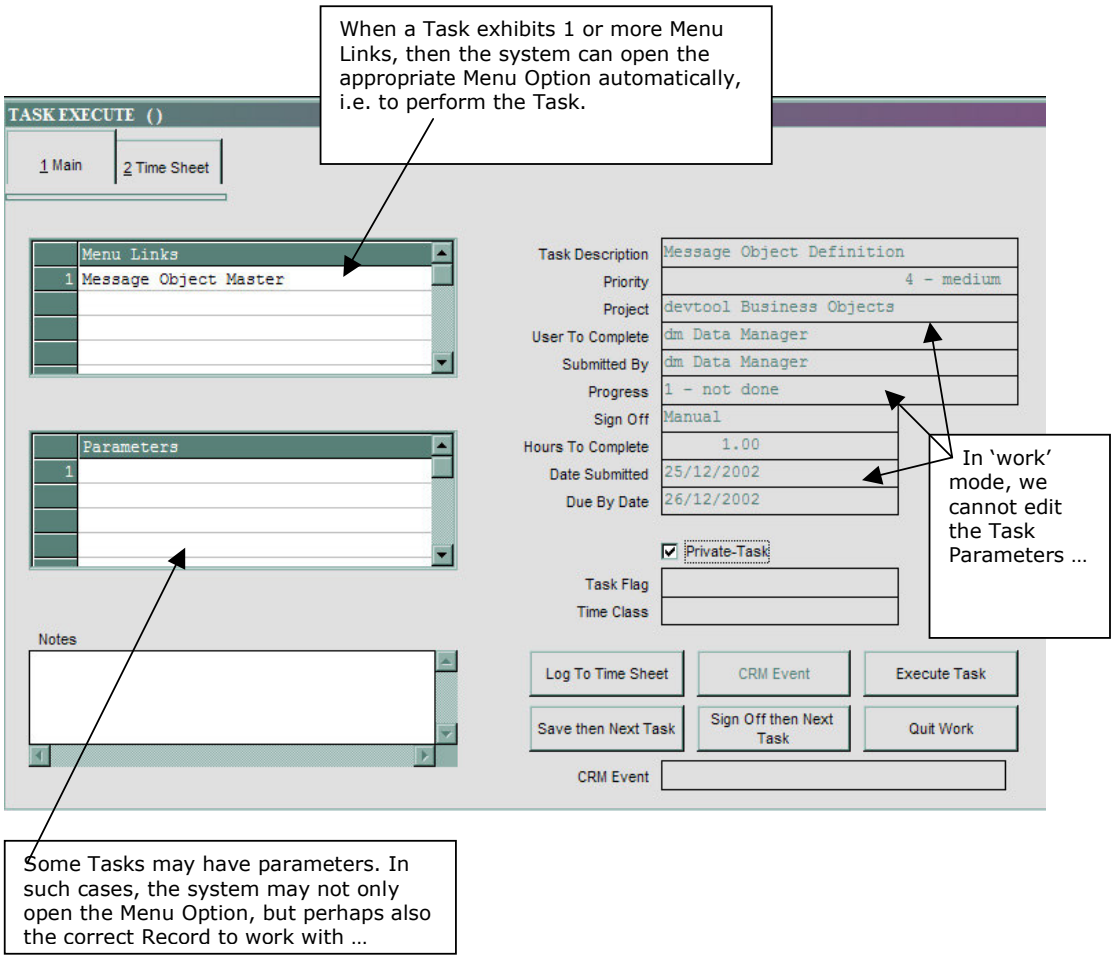


Work

Offers the Currently Selected Task list, and you select which Tasks to Work on.



You may select ALL, or only the Tasks you want to work on. Once a Selection is made, the system 'opens' the 1st Task in the Selection.



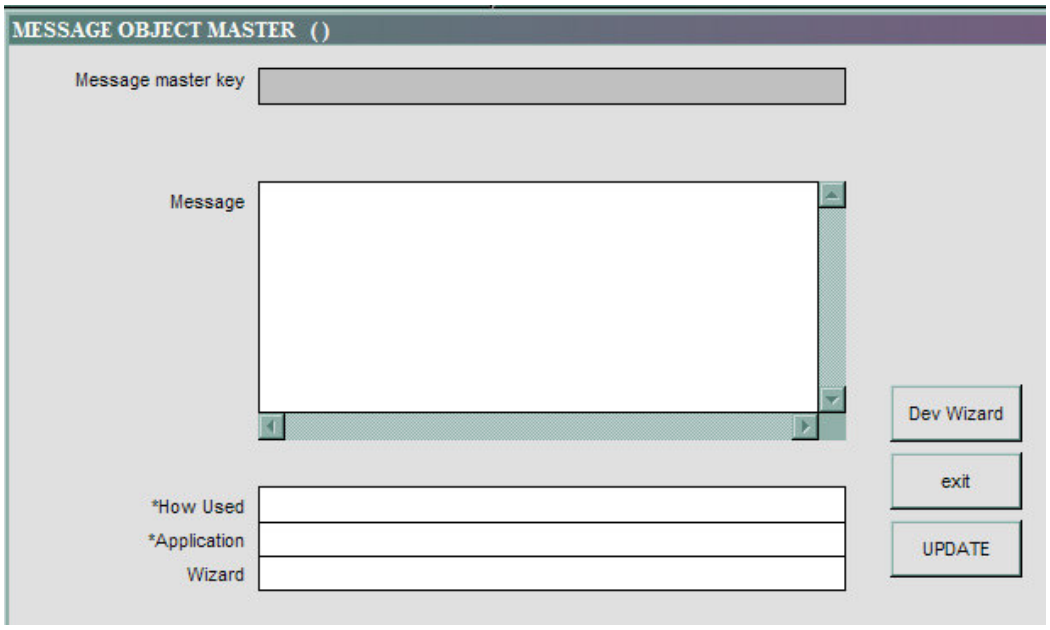
LOG TO TIME SHEET will allow us to update our Time Sheet with time spent on the Task, which we may do multiple times for a lengthy Task, and perhaps on which we spend time on different days.

SAVE THEN NEXT TASK is used to do nothing about this Task right now, and move on to the next Task in the List.

SIGN OFF THEN NEXT TASK is used to Sign Off the current Task, and then open the next Task.

QUIT WORK is an option to exit the current Task Work List.

When we choose EXECUTE TASK, the system opens the correct Menu Option –



In this case, the system opened the appropriate Menu Option to complete the Task. Since there are no Parameters present, the system has no idea which Record we want to work with. Also, you may certainly have Tasks that do not have, or do not relate to any Menu Options, in which case you simply open the Task to establish any necessary details, then perform the Task, and come back afterwards to Sign Off the Task.

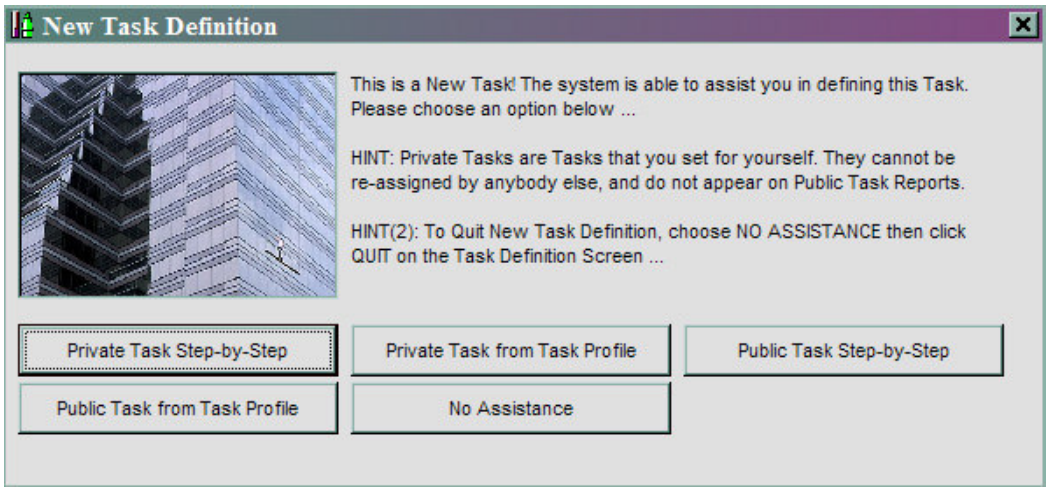
New Task

Used for Manual Task Submission.

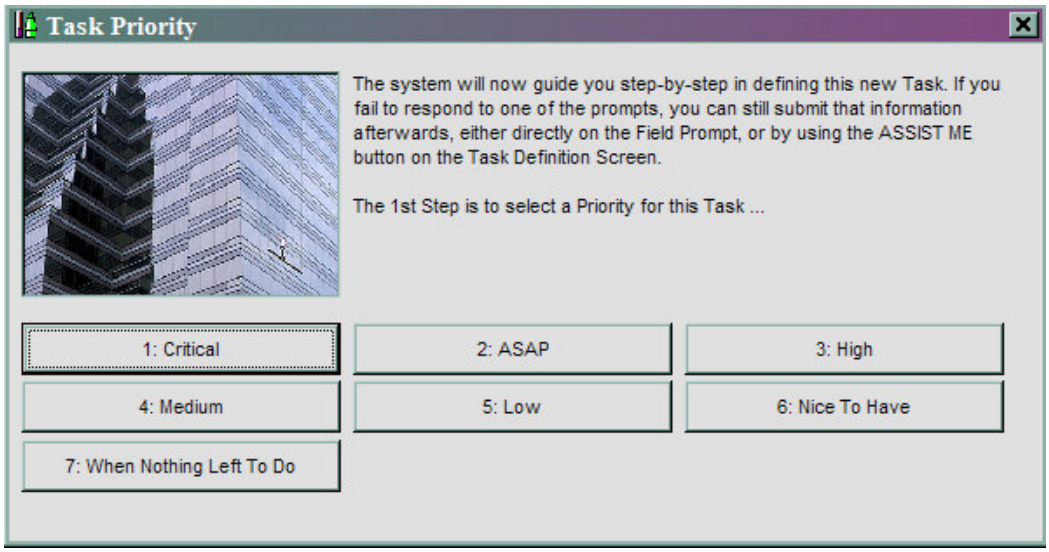
There are many ways in which Tasks may be submitted to your Queue. The Task Scheduler, which operates on Task Triggers, is able to apportion work. For example, if you work with New Loan Applications, and you are one of a Team of 10 who perform this function, you may find that the Scheduler pushes every 10th New Loan Application into your Queue, while the others are proportionately shared among the other people who perform New Loan Applications.

Tasks may also end up in your Queue from Task Schedules that are launched for different functions, and which include functions that are your Responsibility. Likewise, Tasks may be submitted automatically by CRM, Alerter, and other Applications.

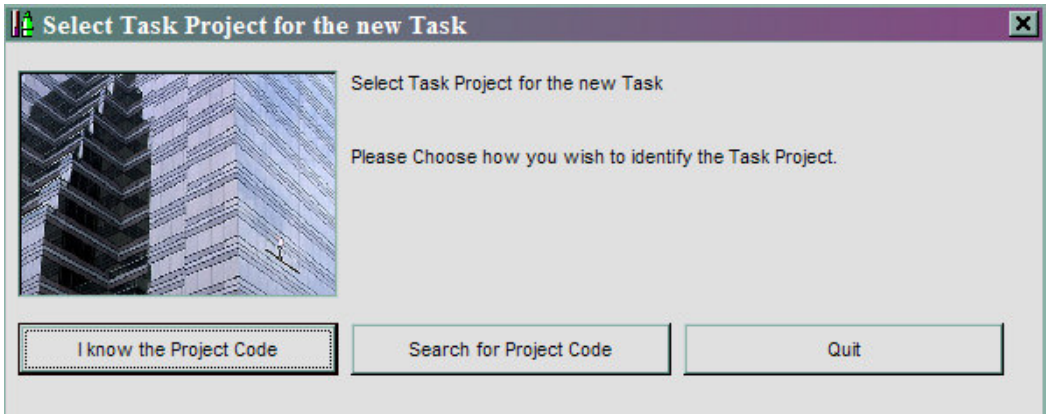
However, the NEW TASK option is specifically provided for manual submission of Tasks, whether you are submitting a Private Task for yourself, or submitting a Task for someone else.



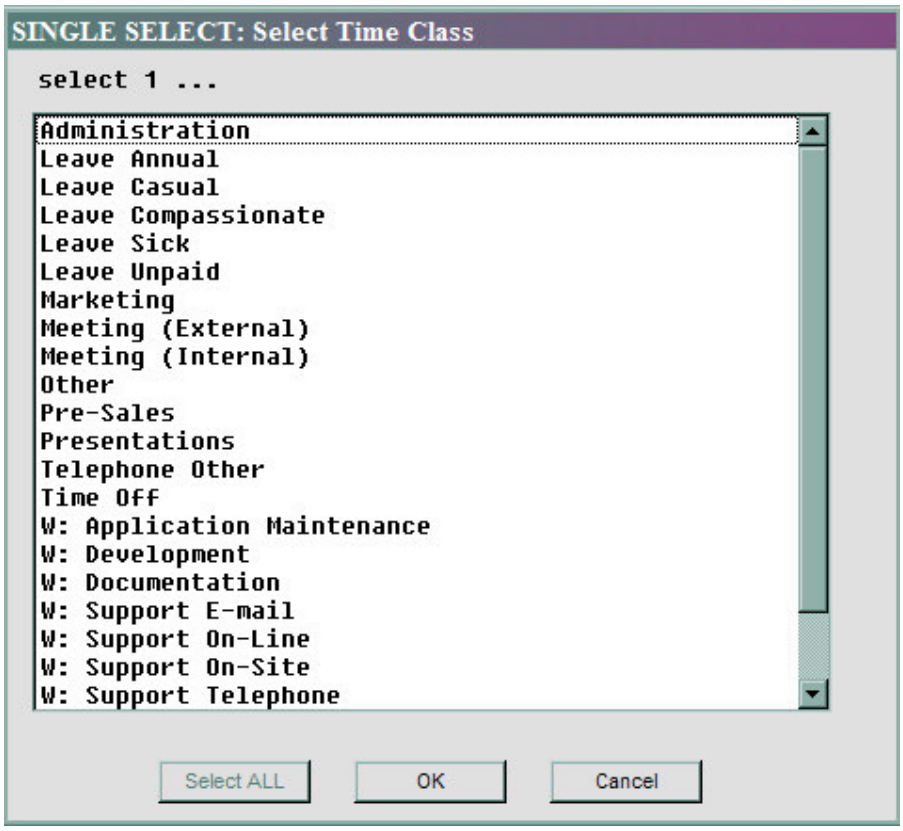
A Private Task is one that cannot be seen by others, regardless of their status in the Task Hierarchy. It is your Task. A Public Task is visible to the Task Hierarchy, whether the Task is for yourself or someone else. Both PRIVATE and PUBLIC Tasks may be submitted Step-by-Step or from a Profile. A Profile is simply a preformatted Profile which will fill in most of the Details for the Task, and is defined for those Tasks that are likely to recur. Step-by-Step means just what it says: you will be prompted for each piece of Information that is required to submit a Task. Let's have a look at a Private Task, Step-by-Step –



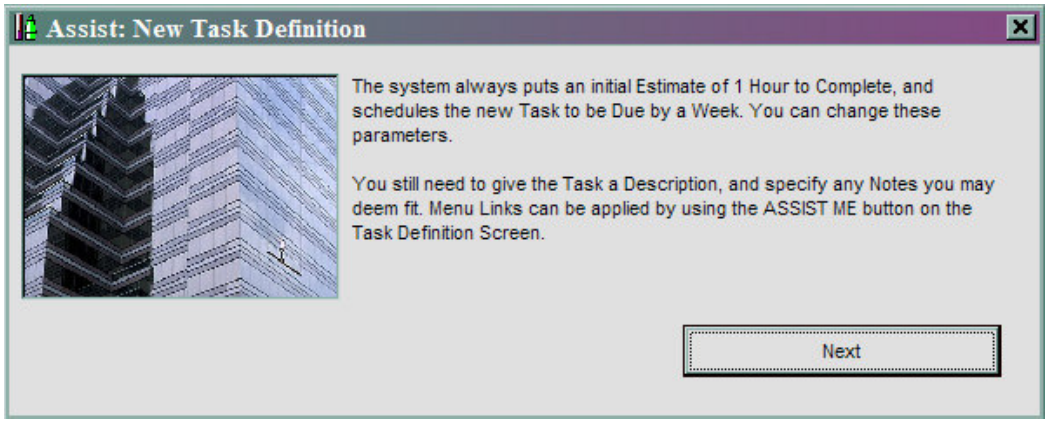
The 1st choice is the Priority to be attached to the Task.



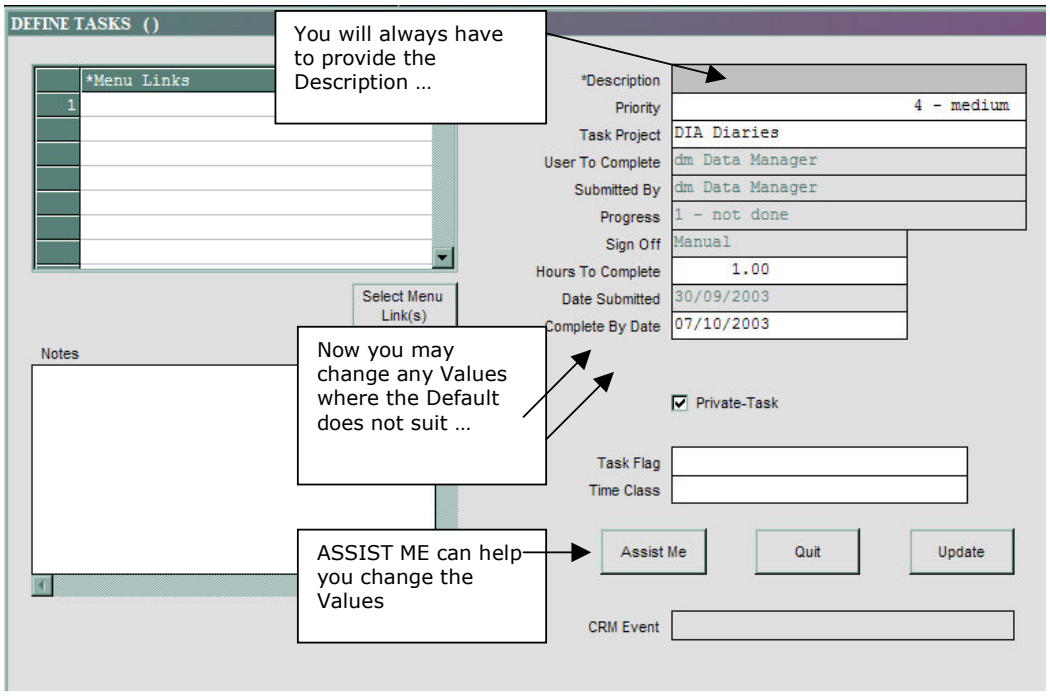
Then choose a Project …



Select a Time Class … (Time Classes are locally defined, and yours may be totally different to the example shown here.)



Some information is displayed, and then the new Task Definition is offered for further changes where necessary –



Note that, by Default, the system assigns the new Task to yourself, but you can select a different User, provided you have the Access Rights to do so.

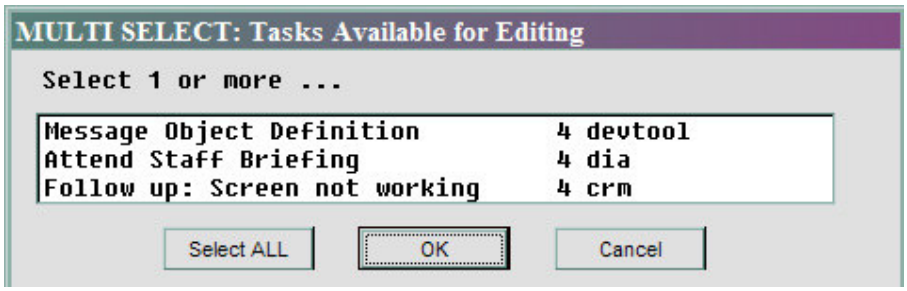
When done, choose UPDATE and the new Task is submitted.

PUBLIC Tasks are submitted in like fashion, and with Profiles (which you can study in the 2nd Manual in the Task Series) you can select which Profile to use, and then the system fills in the details and offers the final step as shown above.

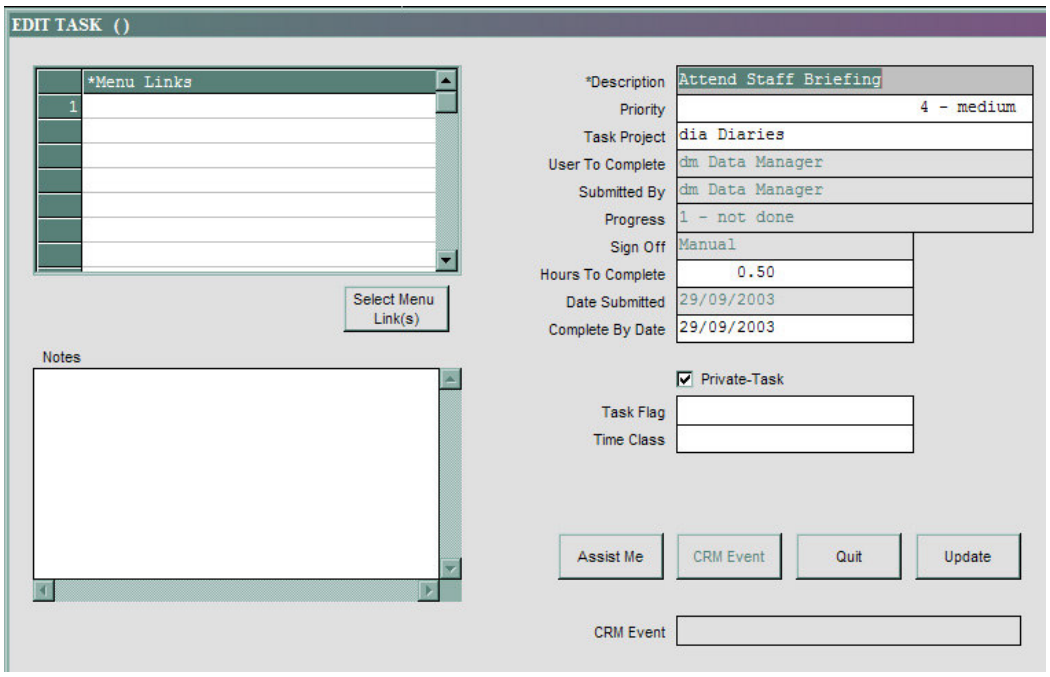
When you choose UPDATE, the system submits the Task and enters another Task Definition. If you do not wish to submit another Task, just choose NO ASSISTANCE and then choose QUIT to exit the Screen.

Edit Task

Used to change Parameters on an existing Task, selected from the current List.



Select form the active List the Task(s) you wish to edit, and the system opens it up …

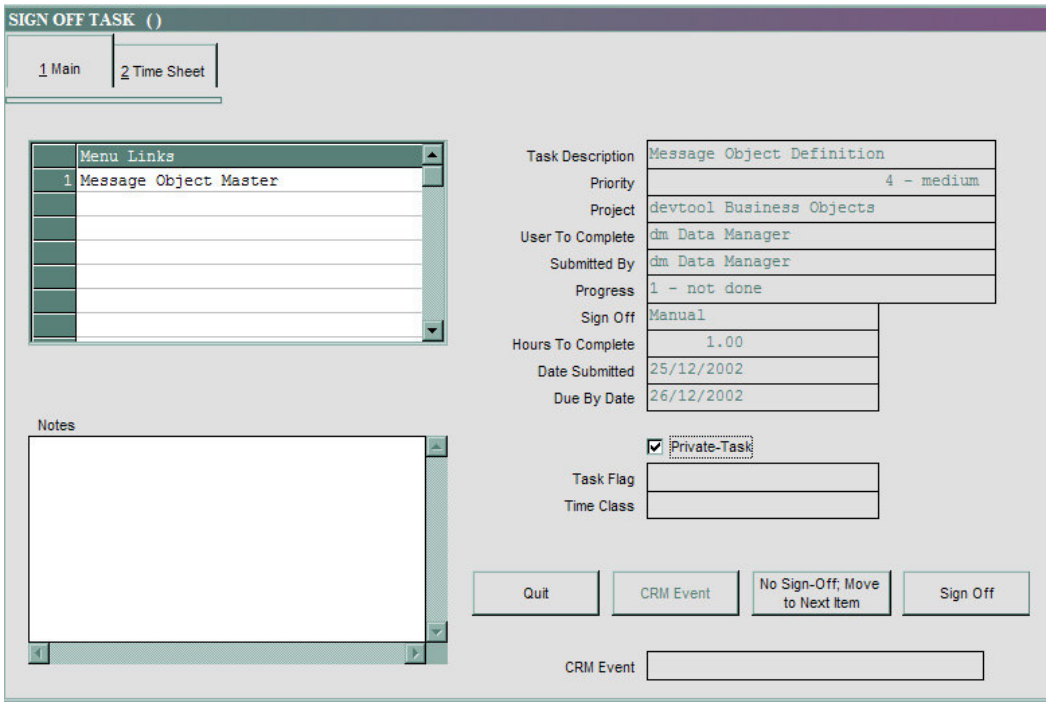


You may use ASSIST ME to help you change any of the Values on the Task, including re-assigning the User to complete, and then choose UPDATE.

Sign Off

Although there are many seamless 'Sign Off' options available while Working with Tasks, this option specifically allows you to select Tasks from the current list, for Sign Off.

Once again, the system offers the active Task List, and you can select 1 or more Tasks. When you have made a Selection, the system opens the Tasks one by one …



Use NO SIGN-OFF to move to the next Task without Sign Off on the Current Task, or use SIGN OFF to Sign Off this Task and move to the next. Use QUIT to exit the Sign Off Queue.

Check Progress

This option ignores the current active Task List, and allows you to set specific Task Selection Criteria to be measured with regards to Task Progress towards completion.

Here's an example. You are the Financial Controller, and have launched a Task Schedule with all the Tasks associated with the Month End Procedures, to be performed by a range of other Users. Now you wish to monitor progress on the Month End Procedures, and CHECK PROGRESS is the perfect option to do that. But there are many other scenarios that are equally valid. In the example shown below, we are looking at Tasks associated with System Development –

NOT DONE YET ! TASK PROGRESS

	>>> Not Done: Task Title	Date In	Complete By	Assigned To	Submitted By
21	Include in Production Rel	25/08/2003	27/08/2003	Ralph Bush	Alinda Kruwitz
22	Include in User Manual	25/08/2003	28/08/2003	Jo-Ann Bezik	Alinda Kruwitz
23	Proof Read User Manual	25/08/2003	28/08/2003	John Smith	Alinda Kruwitz
24	Include in User Manual	01/09/2003	04/09/2003	Cindy Wilson	Alinda Kruwitz
25	Proof Read User Manual	01/09/2003	04/09/2003	John Smith	Alinda Kruwitz

Submitted From	To	Due From	To	Submitted By	Project
01/07/2003	30/09/2003	01/07/2003	30/09/2003	Any User	ALL
Change	Change	Change	Change	Change	Change

DONE !

	>>> Done: Task Title	Date In	Complete By	Assigned To	Submitted By
1	CRM: Cust 00012 Bartholom	19/08/2003	19/08/2003	Alinda Kruwitz	Alinda Kruwitz
2	Demo Task	19/08/2003	26/08/2003	Alinda Kruwitz	Alinda Kruwitz
3	Do Screen Specification	24/07/2003	25/07/2003	Ralph Bush	Alinda Kruwitz
4	Determine Impact on Other	24/07/2003	25/07/2003	Ralph Bush	Alinda Kruwitz

Nex Pre Load Tasks Exit

You choose the Date Ranges, Origin and Project, and then you choose LOAD TASKS. The Tasks that remain as Incomplete are shown at the top, and the Tasks that are Signed Off are shown at the bottom. Any of these Tasks may be 'opened' by doing a dbl-click on the row. If you have the necessary Access Rights, you may re-assign a Task on the spot. (When you select a Task to Open, the system checks your Rights on that Task, and offers either QUERY or EDIT mode, depending on your Rights.)

You can change the Criteria, and choose LOAD again for different results.

Task Profiles

Is the option that leads to the various functions for managing Task Profiles, and is discussed in detail in the 2nd Manual in this series.

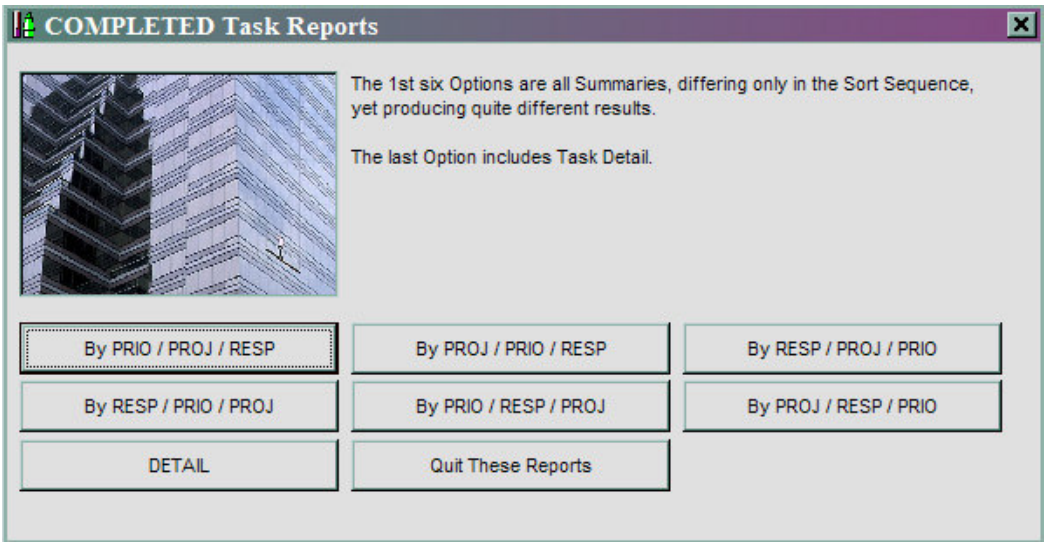
List Active Tasks

Ignores the current active Task list, and offers Report Options on Tasks that are still outstanding.

In the picture above, we see that there are a number of different formats to produce ACTIVE TASK Reports.

List 'Done' Tasks

Offers Report Options on Completed Tasks.



All of the above options will allow you to choose Selection Criteria as to which Tasks to include in the Report you wish to execute.

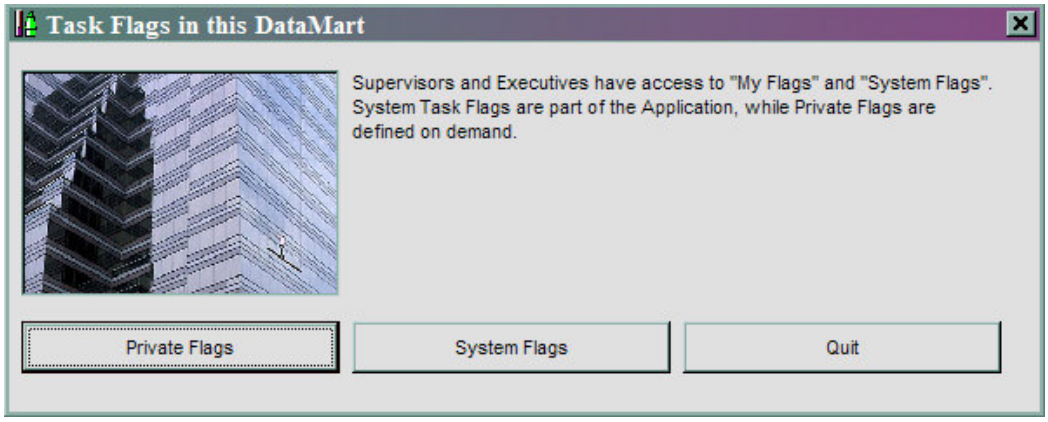
Task Flags

Task Flags are used when you want to apply ALERTER to Tasks (also see the Alerter User Manual). There are PRIVATE (for your exclusive use) as well as SYSTEM Task Flags.

New Tasks are submitted all the time, and each of them has a Unique Key. There is no way Alerter can know which Tasks to evaluate for a specified Trigger, unless these Tasks are also identified with a unique Task Flag. There may of course be any number of Flags, and there can be many Tasks with the same Flag. When an Alert Trigger needs to evaluate Tasks, it should be able to select ONLY those Tasks which carry a certain Task Flag, and that's what Task Flags are for.

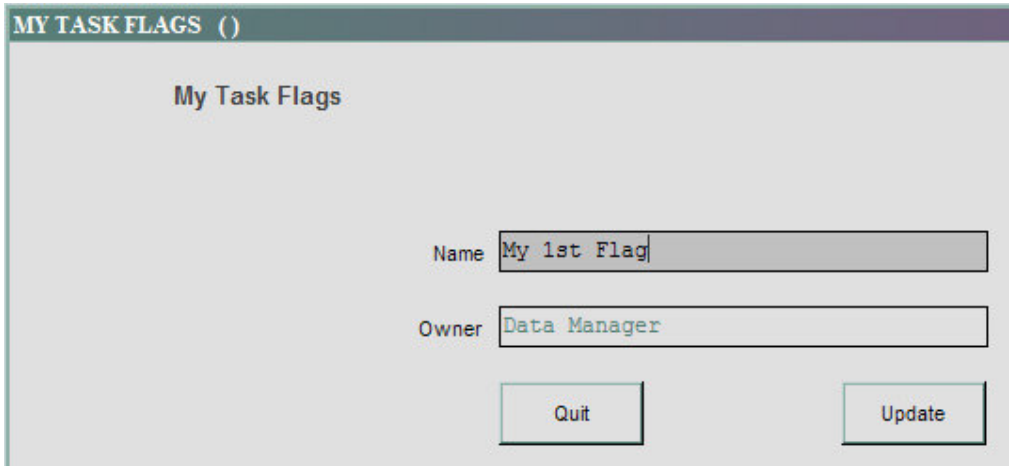
We also distinguish between PRIVATE and SYSTEM Task Flags. The former is used only by yourself, and with your own Triggers, whereas the SYSTEM Flags are usually part of the Application Function, and used with Application Alerter Triggers.

The method of definition is the same for PRIVATE and SYSTEM, and therefore we need only have a look at an example to define a PRIVATE Task Flag.



Choose PRIVATE …

It's all very simple. You can also EDIT or LIST the Flags. A NEW Flag consists simply of a Name or Description, plus OWNERSHIP, which is transparently managed by the system.

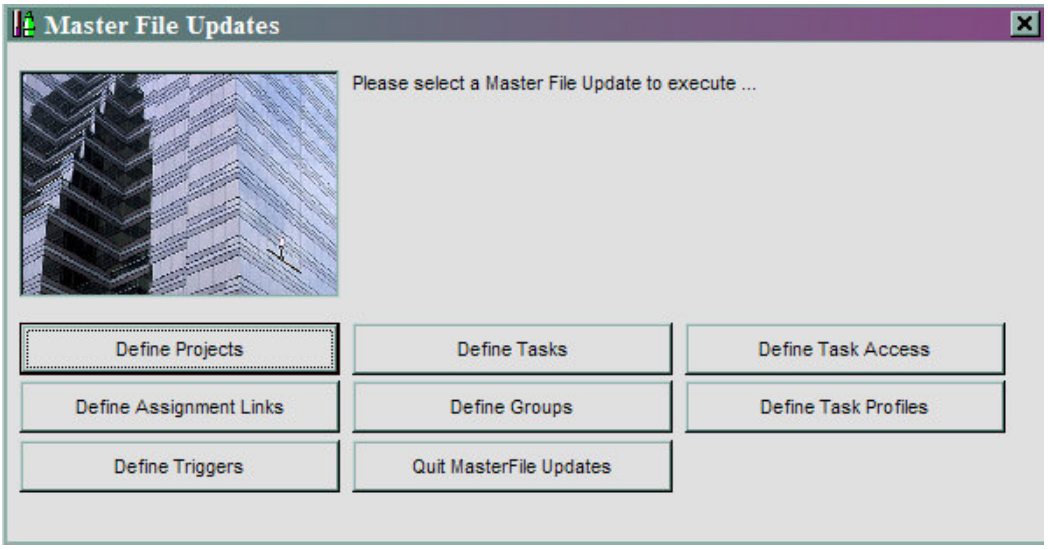


Schedules

Schedules are like 'trays' of pre-formatted Tasks that are periodically launched, and by using Schedules life is so much simpler. Schedules are explained in the 3rd Manual in this series.

Master File Updates

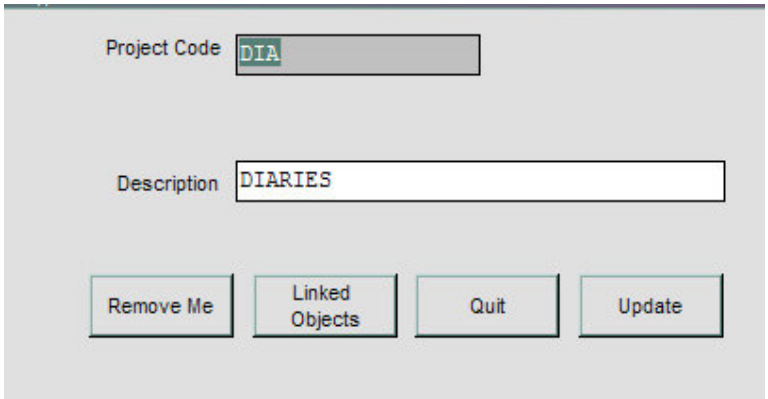
Here you will find Updates for the Task Master Files, including Projects, Groups, Assignment Links, Triggers, etc. (Task Triggers, 1 of the options to be found here, is discussed in the 4th Manual in this series.)



We observe the following options –

DEFINE PROJECTS

We define PROJECTS in order to associate Tasks with them. This makes it much easier to select and manage Tasks, and report thereon. However, at most sites Users will not be allowed to define Projects on an ad hoc basis. The option would usually be restricted to Task Administrators only, and you may have to request a Project rather than simply define it yourself.



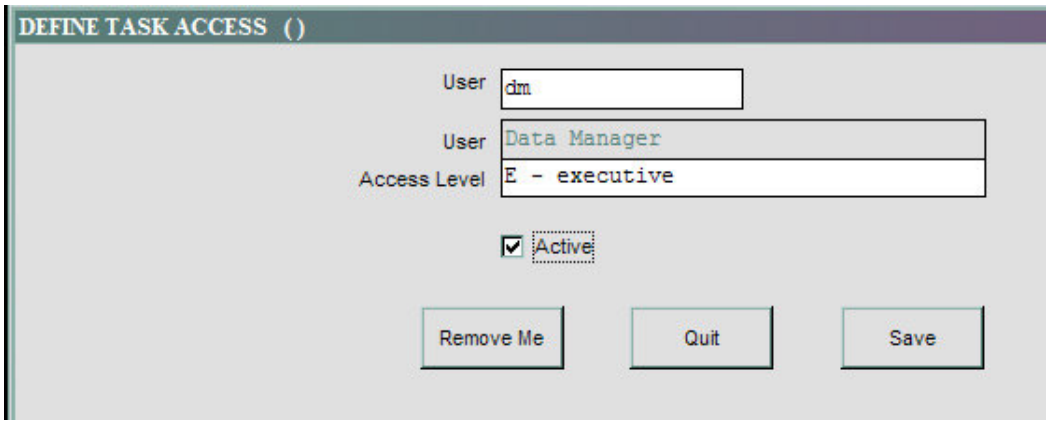
The actual definition of a Project is straight forward. It requires a Code to identify it by, and a Project Description.

DEFINE TASKS

This option is the same as NEW TASK, which we have already dealt with.

DEFINE TASK ACCESS

This option is used by the System or Task Administrator to specify your position in the Task hierarchy, i.e. Executive, Supervisor or User.

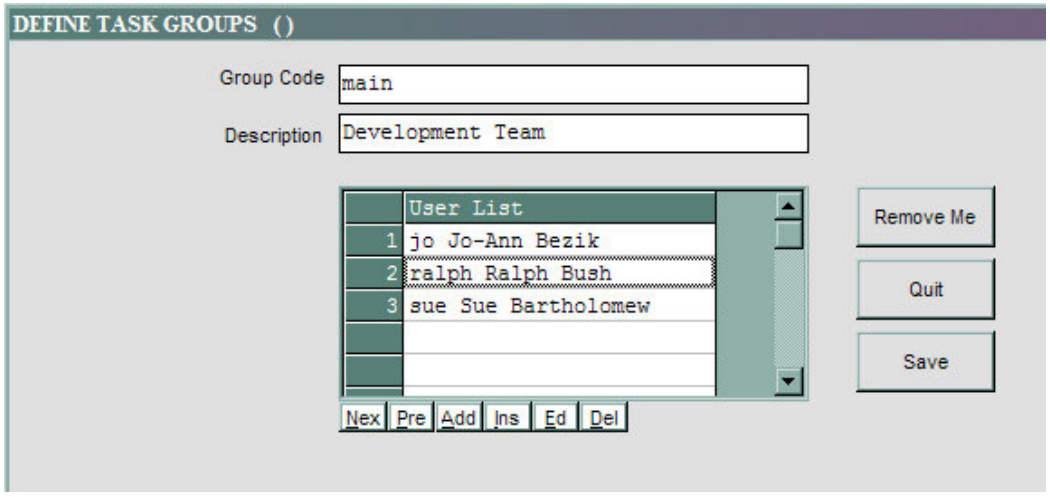


The 'Active' check is a signal for the Task Scheduler as to whether the User is available for Task Allocation. Check this Field to allow the Scheduler to Assign Tasks to this User from Triggers; When a User is on leave, sick, etc., use UNcheck for SHUTTLE to know to schedule to another User, if alternatives are available on the Profile ...

DEFINE ASSIGNMENT LINKS

Assignment Links are used exclusive with Task Profiles, and is discussed together with Task Profiles in the 2nd Manual in the series.

DEFINE GROUPS



Task Groups are defined to list the members subscribing to such groups, for purposes of Task Selection and Scheduling.

The objective with Groups is simply to enable easy selection of a number of Users, e.g. by Task Group, for purposes of interrogating and / or manipulating Selected Tasks. Why should we have this facility in addition to the Assignment Links, which also contain User Lists? Well, the Assignment Links are used by the Auto Scheduler, and the lists may be different to the needs that prevail when a Supervisor or Executive Task User wishes to select Tasks for certain groups of Task Users. Therefore, a Supervisor or Executive Task User can define his / her preferred Groups and simply set Preferences by selecting the Group, and all who are part of it.

DEFINE TASK PROFILES

Task Profiles are discussed in the 2nd Manual in the series.

DEFINE TRIGGERS

Triggers are discussed in the 4th Manual in the series.

Master File Enquiries

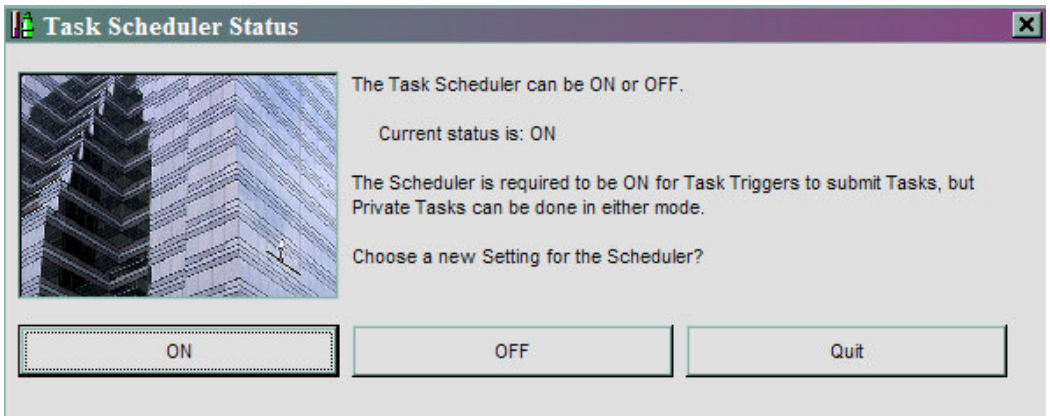
These are the 'look only' equivalents of the Master File Updates, for use by Users who may not necessarily perform UPDATEs to these Files.

Master File Reports

These are the Report options on the Master Files.

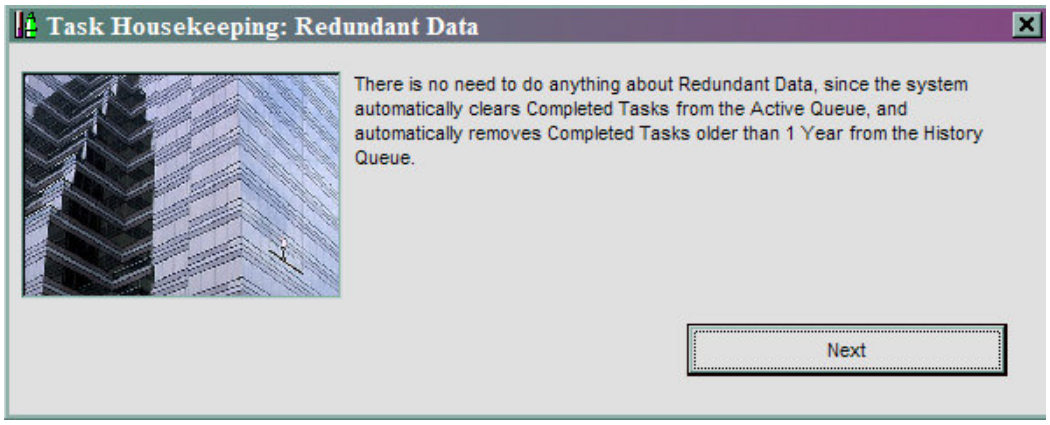
Control Parameters

This option is used to switch the Task Scheduler ON or OFF. When it is off, Task Triggers will NOT launch Tasks, but all other Task Submission options remain valid.



Housekeeping

There is no Housekeeping of Task Data required, since it is all automated and done by the system.



DEVELOPER'S NOTE:

For Developers, please note that you may integrate automatic submission of Tasks from any Application, by using an AFS (Application Function Subroutine) call. Please use the HowDoI Function and search on '[tips]' to find the details for the 'task.submit' call.

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