

# TASK PROFILES: 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.

This Manual is # 2 in the Task Desk series, and covers the subject of Task Profiles. The Manual should be read together with the other Manuals in the Series, and certainly must be preceded by Manual # 1.

## Purpose of the Manual

The purpose of this User Manual is to introduce you to the use of TASK PROFILES.

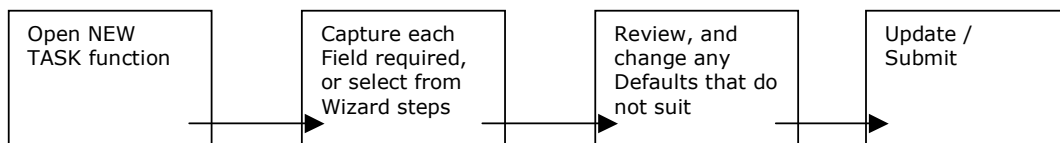
The Task Desk Manual is presented in 4 parts.

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

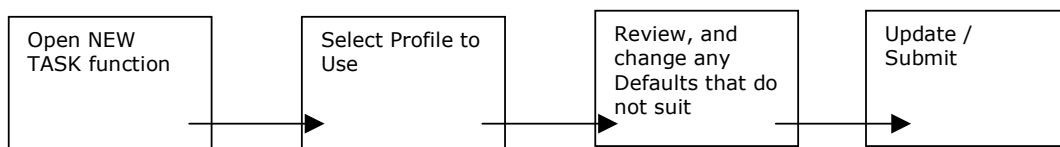
## What is it? Task Profiles

When you submit a Task manually, Field by Field, you will quickly realize that it would be rather nice to have a method whereby you do not need to capture these Fields each time that you want to submit a new Task. Task Profiles is such a method -

Submit a new Task manually -



Submit a new Task using a Profile

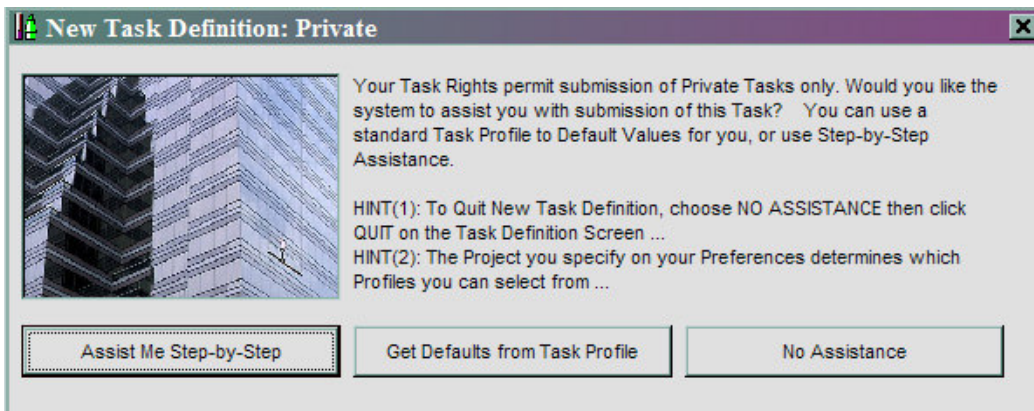


If we compare the 2 methods illustrated above, it is really only step 2 that is different. Instead of having to choose a Value for each of the required steps in a

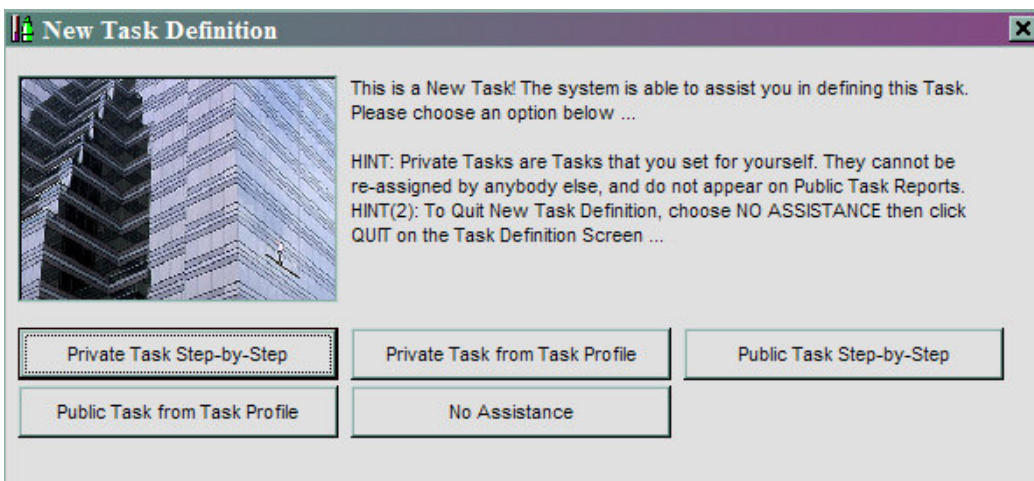
new Task, they are pre-defined on a Profile, so it's easier and quicker to use a Profile. You still retain the opportunity to change any of the Values from the Profile, before submitting the Task.

We discern 2 categories of Task Profiles, namely PRIVATE and PUBLIC. PRIVATE Task Profiles are used to submit private Tasks, i.e. for yourself. PUBLIC Task Profiles can be used for private and public Task submission, PLUS they have another function in addition. PUBLIC Profiles can also be used by Task Triggers to submit Tasks automatically, as an Application Function (see the User Manual on Task Triggers).

If your Task Status = USER, then you can only access the PRIVATE Task Profiles. SUPERVISOR and EXECUTIVE Task Users may also access the PUBLIC Task Profiles.

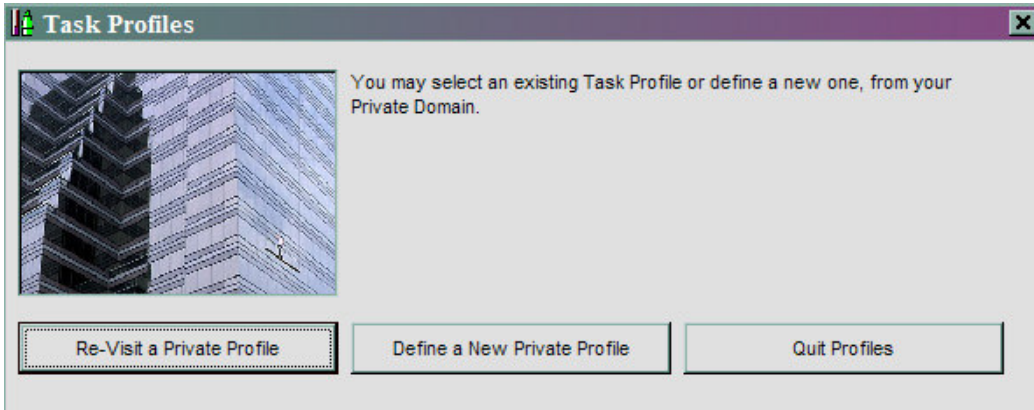


The example shown above is presented when a Task USER opens the 'New Task' function (Private Profiles only), and the example shown below is presented for SUPERVISORS and EXECUTIVES (both Private and Public Profiles).

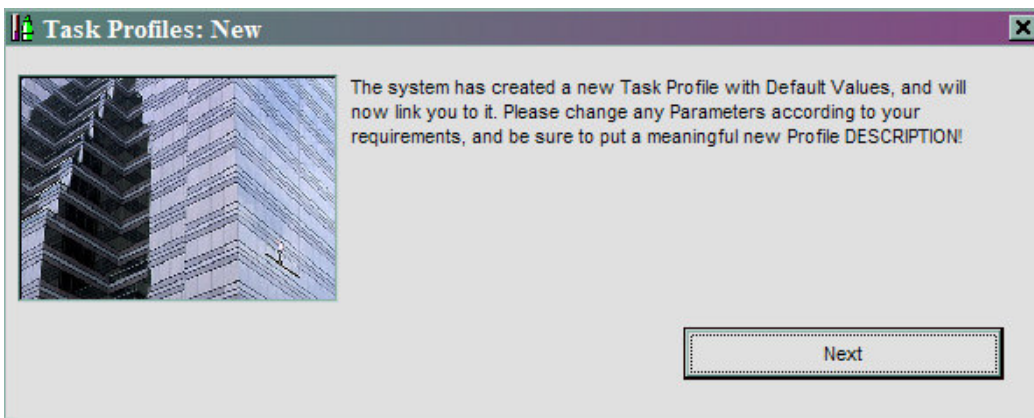


In both cases the option to submit a Task without Assistance, or Step-by-Step, remain. However, when a suitable Profile is available, it will be the better choice.

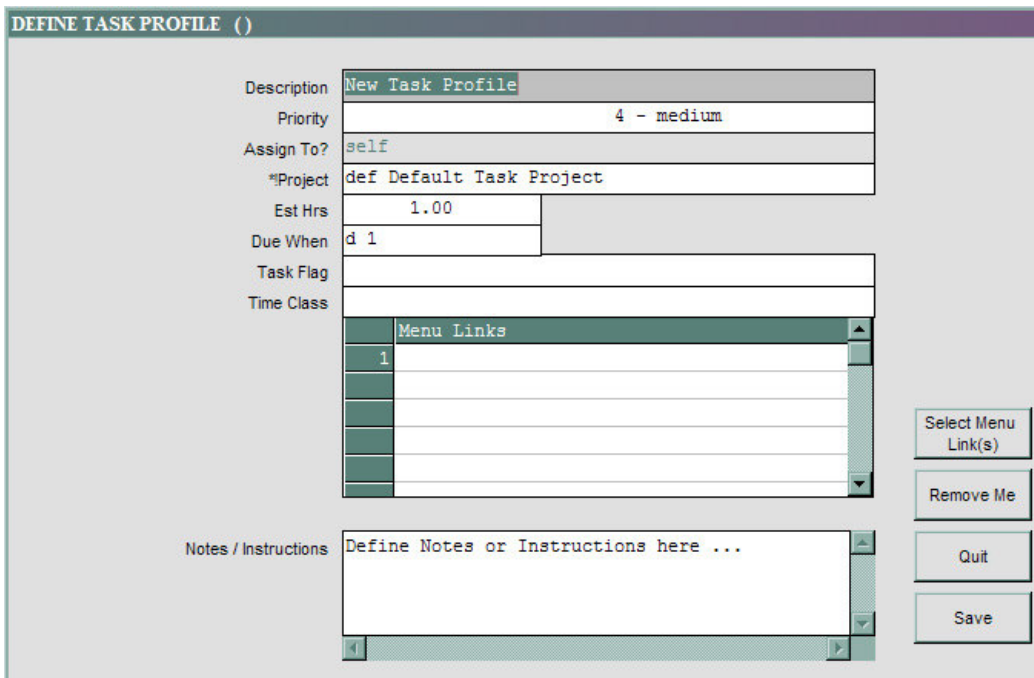
Let us have a look at the definition of a PRIVATE Task Profile, as accessed with Task Level = USER.



We choose NEW –



The system creates a Profile that looks a lot like a New Task, with Default Values. All we need to do is change the Values where necessary, and provide a meaningful Description (Title) for this new Task Profile.



Apart from DESCRIPTION, which really needs to be changed, we can assign a different PRIORITY for this Profile (which will of course become the Default on any new Tasks that we submit with this Profile).

Assignment will always be to SELF, since it is a Private Profile. We can choose a Project, default 'Time to Complete' (Est Hrs), and we can adapt the 'Due When' parameter, which is currently set to schedule completion by 1 Day after Task Submission. The explanation for this Field (on-line Help), looks something like the following –

*when to schedule ?*

*any of the following formats :-*

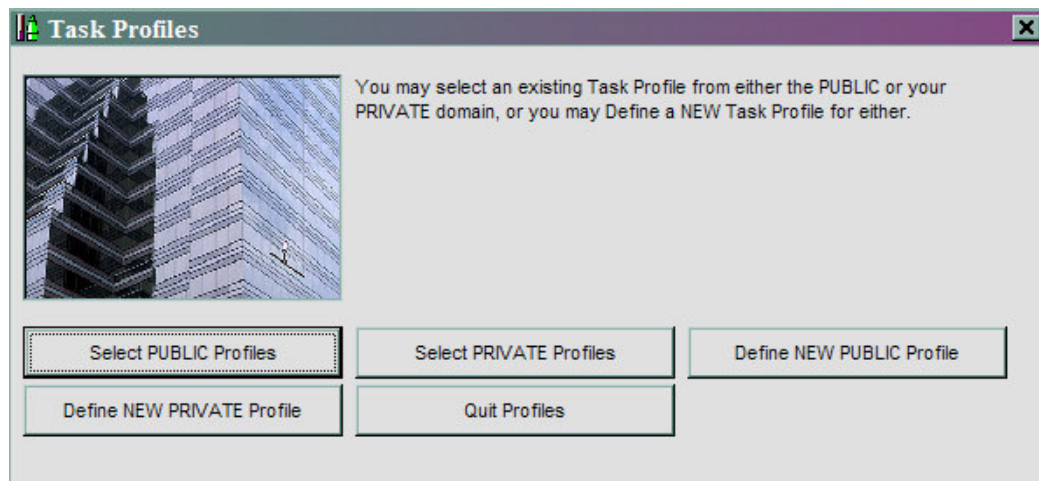
0 ( means today )  
d 1 ( today's date + 1 day )  
d 45 ( today's date + 45 days )  
m 2 ( + 2 months )  
w 3 ( + 3 weeks )  
y 1 ( + 1 year )

*Hint: Because the Profile may be used continually, while the Date is changing all the time, we use a 'pseudo' instruction to indicate to the system how to determine 'for when' to schedule Completion of the Task.*

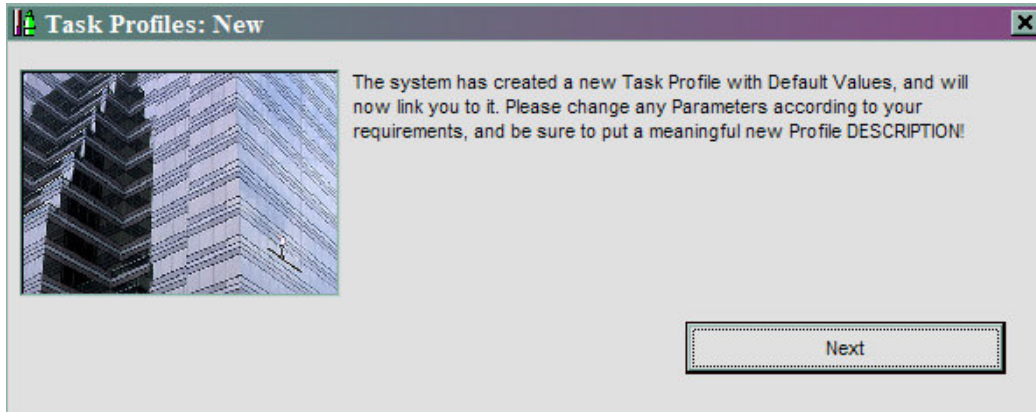
Task Flag and Time Class are both optional values, as are Menu Links and Instructions.

Once the Profile is ready, it can be SAVED and used. Each time it is used, it will fill in a New Task Template with the same Values (except for 'Due When', which will calculate a Due Date according to the instructions specified, and based on the Date when the Task is submitted). You may then change any Value, if necessary, before submitting the Task.

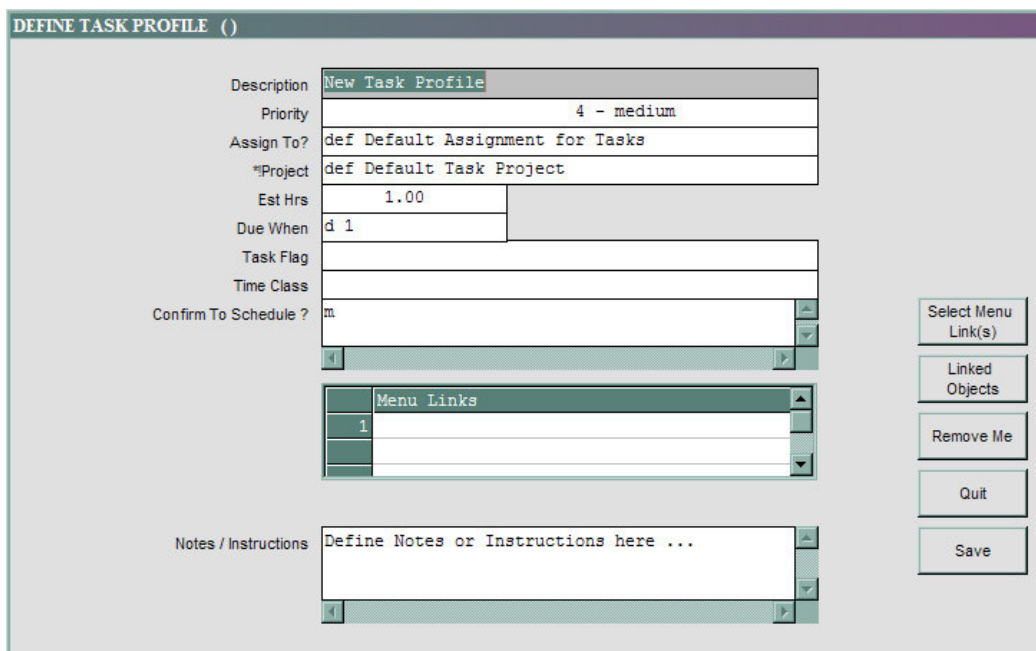
Now let us have a look at the definition of a PUBLIC Profile –



When you open the 'Task Profiles' function, and if you are a SUPERVISOR or EXECUTIVE Task User, your options will look like the example shown above. In this case, we choose DEFINE NEW PUBLIC PROFILE.



Looks familiar, same as for Private Profiles ...



The definition is the same as for PRIVATE, except for the 'Assign To?' and 'Confirm to Schedule' fields.

ASSIGN TO offers the following on-line description :

*Which link on TASK ASSIGNMENT LINKS Master will this Profile use to determine which User to assign the Task to?*

*Hint: For Private Profiles, use "self", while for Public Profiles, use an Object specified on the Task Assignment Link Master (there is a lookup); when you use 'self' the system classifies the Profile as Private to yourself only, and excludes it from Lookups for Public Profiles as well as Lookups for Private Profiles when executed by other Users;*

We will have a closer look at ASSIGNMENT LINKS in a moment.

CONFIRM TO SCHEDULE offers the following on-line description:

*Automatic or Manual, depending on whether any Text is specified here!*

*When a Task Trigger becomes active and wishes to Schedule a Task, it looks at the Task Profile to determine whether the User should be prompted for Confirmation, i.e. whether to Schedule the Task or not. Thus, if the Trigger should automatically schedule a Task when all Conditions have been met, without asking the User, then this Field should contain no Text at all. If you wish the User to decide in a given context whether or not to Schedule a Task, then state Text here to be displayed to the User when he / she is prompted for Confirmation on whether to Schedule the Task or not.*

*Hint: On Private Profiles, this setting should always be NULL.*

This Field is of importance when the Profile is used by a Task Trigger only. For manual submission of Tasks from the Profile, it is irrelevant what is specified here.

So there is nothing difficult about the definition of Task Profiles! Now let us have a look at the Task Assignment Links, which we encountered in the above example. (The function is found with TASK MASTER FILE UPDATES.)

The screenshot shows a dialog box titled "DEFINE TASK ASSIGNMENT LINKS ()". It contains two text input fields: "Assignment Key" with the value "DEF" and "Description" with the value "Default Assignment for Tasks". Below these is a table titled "User List" which is currently empty. A callout box with an arrow pointing to the table contains the text: "When no Users are listed, the Task will always be assigned to the Current User." To the right of the table are four buttons: "Linked Objects", "Remove Me", "Quit", and "Save". At the bottom of the dialog are six small buttons: "Nex", "Pre", "Add", "Ins", "Ed", and "Del".

A Task Assignment Link object is nothing but a list of Users who may be assigned the Task. It is specifically relevant for the Task Scheduler, which may automatically submit Tasks from Task Triggers in the Application.

For example, if the User List includes 3 Names, then the Scheduler will ensure that each of the 3 Users gets the same amount of work, i.e. will schedule the 1<sup>st</sup> Task for User # 1, the next for User # 2, then # 3, then starts with User # 1 again. *Hint: Only the Scheduler operates in this fashion. For manual Task submission based on the Profile, Current User will be the Default assignment.*

In summary then, Task Profiles are just useful Templates with pre-defined Values that make it easier for us to submit a range of recurring Tasks, whenever the need arises.

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