TASK SCHEDULES: 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 # 3 in the Task Desk series, and covers the subject of Task Schedules. The Manual should be read together with the other Manuals in the Series, and certainly must be preceded by Manuals #1 & #2.

Purpose of the Manual

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

The Task Desk Manual is presented in 4 parts.
> a) Use of the Task Desk
> b) Use of Task Profiles
> c) Use of Task Schedules (current Document)
> d) Use of Task Triggers

What is it? Task Schedules

When we looked at Task Profiles in Manual # 2, we proposed that the use of Profiles is a great method whereby you do not have to specify each Field every time you submit a Task. Task Schedules go one step further than Profiles, in that they contain pre-defined Tasks, and by launching a Schedule, the system can automatically submit any number of Tasks without any further intervention from you. We could say that a Schedule represents a collection of Profiles, from which the system will automatically submit a range of Tasks on demand.

```
Task Schedule                LAUNCH           Task Queue

Task # 1                        ──────►
Task # 2
Task # 3
```
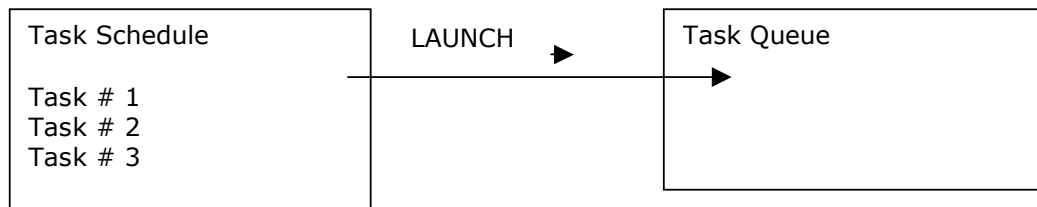
Let us have a look at what happens when you open the 'Task Schedules' function …

A Schedule must include some Tasks, and a Task is always related to a Task Function

The LAUNCH function will submit Tasks from the current Schedule, to the Task Queue

TASK SCHEDULE PROCESSING ()

| Task Schedules | Load | New | Edit | Remove | List | | LAUNCH Tasks from Schedule |

| Task Functions | | New | Edit | Remove | List |

| Tasks | Task Order | New | Edit | Import | Remove | List | | Exit |

| >>> Task Description | Project | User Function |
| 1 | | |

This area will list the Tasks on the Schedule when it is loaded

Nex Pre

Schedule [   ]   Type [   ]

When you open 'Task Schedules', there is no Schedule loaded yet

We discern 2 types of Schedules, e.g. Private and System

It is necessary to understand why we have System and Private Schedules. You will always launch Tasks from a Private Schedule, but the System Schedules are Schedule Templates with which you can more easily create your Private Schedules.

System Schedule   The system makes you a   Private Schedule
                       Copy of your own …
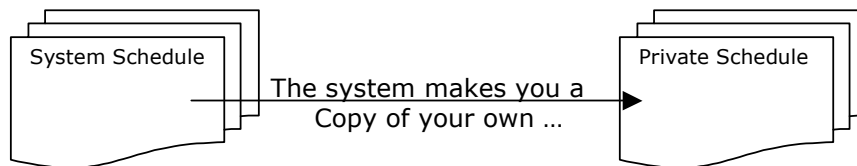
Here's an example. Your Accounting system includes a number of Schedules, one of which includes all the Month End related Tasks. As Financial Controller, you simply retrieve this 'Month End Task Schedule', the system makes you a copy, and it becomes one of your Private Schedules. When Month End comes round, you just load the Schedule, click LAUNCH, and all the Tasks are submitted automatically to the right people. Then, you just use CHECK PROGRESS (see Manual # 1) to oversee the process.

If you're a SUPERVISOR or EXECUTIVE Task User, you may also create new System Schedules that others may use to create standard Schedules with common or regular Tasks that fit their requirements. And, whatever your Task User status, you can build Private Schedules by defining each Task in turn, and after that never have to define those tasks again, you simply LAUNCH the appropriate Schedule.

Looking at the 'Task Schedule' function shown above, we discern 3 main rows of functions. The 1st is for Schedules, the 2nd for Task Functions, the 3rd for Tasks. We will discuss each of these in turn. At this time, we should just note that the Task Functions are present for convenience, and that the Task Functions are not

'tied' to a specific Schedule, but can be used across many Schedules. The Tasks, on the other hand, always relate to the currently loaded Schedule. But why do we use Task Functions? Imagine having more than a thousand Tasks, on a variety of Schedules, in your system. Now imagine that a Staff Member resigns, or is promoted and will no longer perform the Tasks he / she used to? We might have to change the 'Responsibility to Complete' on many Tasks, not so? And that would be an arduous and unnecessary exercise, because with Task Functions, we simply list the responsible UserCodes on the Functions, and when somebody moves, leaves, whatever, we simply update a few Task Functions with new UserCodes.
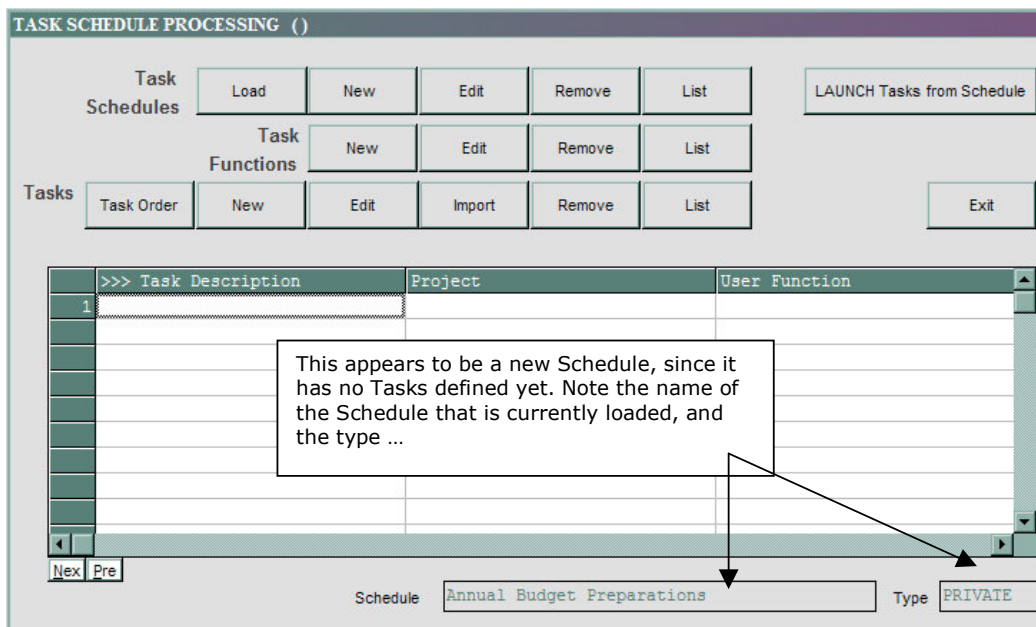
In the TASK SCHEDULES row, we find the following options:

Load
Loads an existing Schedule into the workspace
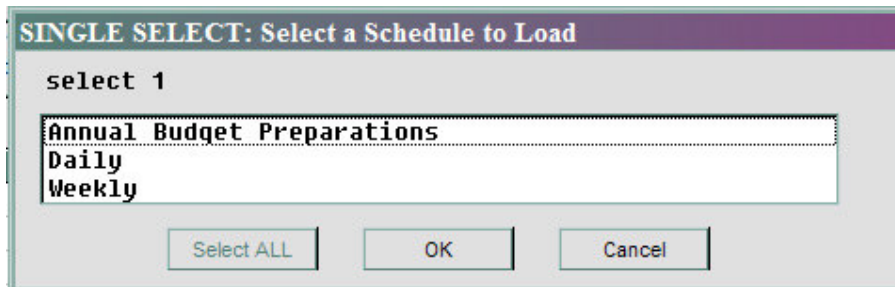
Select a Schedule to Load, and the system loads it into workspace –

TASK SCHEDULE PROCESSING ()

	Task Schedules	Load	New	Edit	Remove	List		LAUNCH Tasks from Schedule
	Task Functions		New	Edit	Remove	List		
Tasks	Task Order	New	Edit	Import	Remove	List		Exit

	>>> Task Description	Project	User Function
1	Do Screen Specification	Schedules (Tasks)	Myself
2	Determine Impact on Other	Schedules (Tasks)	Developer # 1
3	Create Screen	Schedules (Tasks)	Myself
4	Test and Debug	Schedules (Tasks)	Myself
5	Ensure adequate On-Line H	Schedules (Tasks)	Myself
6	Approval for Inclusion	Schedules (Tasks)	Myself
7	Include in Production Rel	Schedules (Tasks)	Myself
8	Include in User Manual	Schedules (Tasks)	Myself
9	Proof Read User Manual	Schedules (Tasks)	Myself

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Schedule Add New Screen to Application   Type SYSTEM

This one is a System Schedule, and may be used to create a Private Schedule with the same Tasks, which may then be Edited, some Tasks Removed, others Appended.

New
     Defines a new Schedule
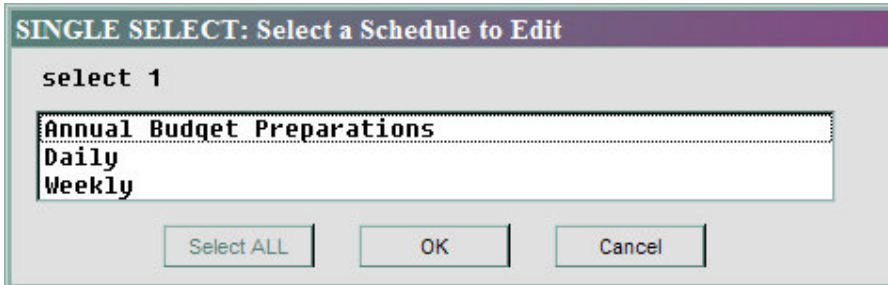
MY TASK SCHEDULES ()

My Task Schedules

Name Annual Budget Preparations

Owner Jo-Ann Bezik

Quit   Update

Jo-Ann is the Co-ordinator for the Annual Budget exercise, and defines a new Schedule for the Tasks that she should submit for herself every year when it is time for the Annual Budget exercise.
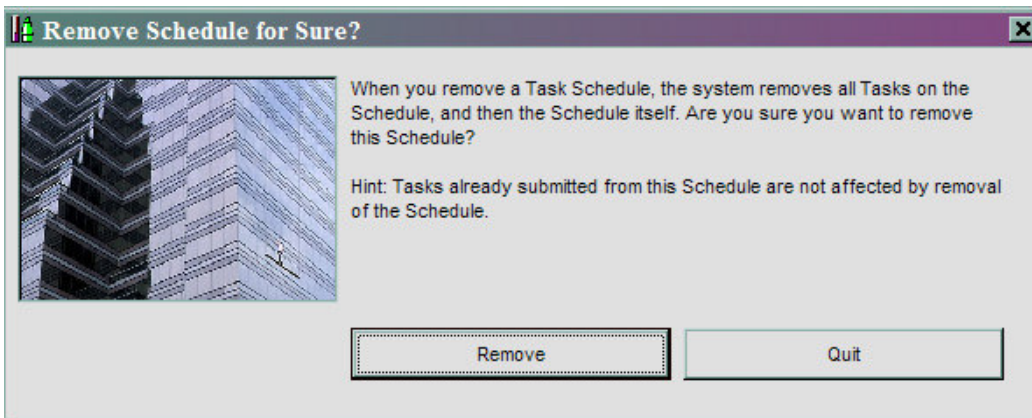
Edit
     Allows you to change the Description (Title) of a Selected Schedule

SINGLE SELECT: Select a Schedule to Edit

select 1

Annual Budget Preparations
Daily
Weekly

[Select ALL]   [OK]   [Cancel]

Select the Schedule to Edit, and change the Title (that is the only Editing done with this Option).

Remove
        Allows you to get rid of the currently loaded Schedule …

Remove Schedule for Sure?

When you remove a Task Schedule, the system removes all Tasks on the Schedule, and then the Schedule itself. Are you sure you want to remove this Schedule?

Hint: Tasks already submitted from this Schedule are not affected by removal of the Schedule.

[Remove]   [Quit]

List
        Lists the System Schedules and the Tasks they comprise (Report)

In the TASK FUNCTIONS row, we find the following options:

New
        Defines a new Task Function

TASK FUNCTIONS ()

Function Name Myself

User Responsible System Manager

[Usage Report] [Exit] [Update]

A Task Function has a Title (Function Name), which could be many different things, and different from one Office to the next, for example : Budget Co-ordinator, Accounts Clerk # 1, Accounts Clerk # 2, Financial Controller, Asset Manager, etc.

A Task Function is always associated with a User who is responsible for that Function, so that whenever a Schedule includes a Task for this Function, it will be submitted for the User specified here. This is a sensible way of organizing Functions, and a single User can be responsible for many different Functions, dependent on his / her Job Description. Now, if 1 of those Functions are moved to somebody else, it is a simple matter to edit the Task Function and specify a different User. Automatically all new Tasks for this Function will be directed to the newly appointed User.

The example above is shown because it is different from all other Task Functions. 'Myself' is always interpreted by the system as 'Current User'. Therefore, if you launch any Tasks from a Schedule, and the Task Function = 'Myself', then the Task is submitted to your own Queue. This particular Task Function is automatically present in your system and should never be Edited.

Edit
      Re-defines an existing Task Function

SINGLE SELECT: Select Function Name to Edit

select 1 ...

Job Descr Meetings Co-Ordinator
Management Report Distribution
Myself

[Select ALL] [OK] [Cancel]

Select the Task Function to Edit –

You may change the Function Name, or the User Responsible. Note also the 'Usage Report', which will list all Schedules in the system that include this Function.

Remove

Removes a Task Function from the system

Select the Task Function to remove …

If the Task Function is in use on any Schedule, it cannot be removed. In such a case, you can check the REPORT option to determine on whose Schedule(s) this

Function is present, and where it should be removed or replaced before the Task Function itself can be removed.

If the Task Function is not in use at all, it will be removed and you will get the following message –

CyberShuttle Client ✖

Removed Successfully

OK
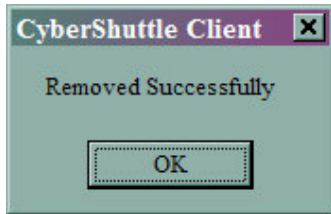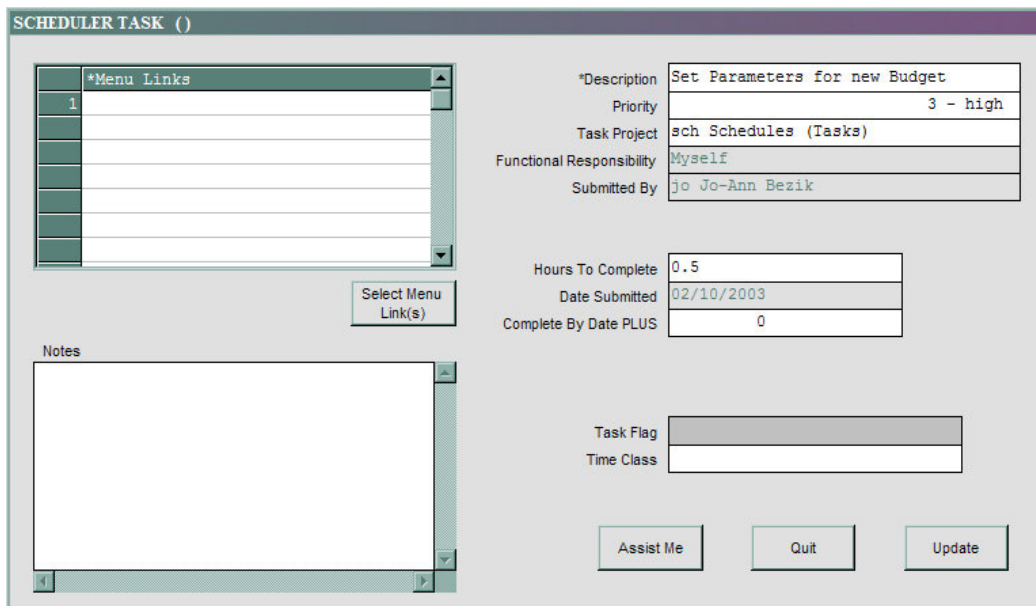
List
    Lists the existing Task Functions (Report)

In the TASK row, we find the following options:

Task Order
    Re-arranges the order of Tasks on the currently loaded Schedule
    (You select a Task to be moved to the bottom, and repeat this option until you have ordered the Tasks according to your liking.)

New
    Defines a new Task on the currently loaded Schedule

SCHEDULER TASK ()

*Menu Links		
1		

Select Menu Link(s)

Notes

*Description: Set Parameters for new Budget
Priority: 3 - high
Task Project: sch Schedules (Tasks)
Functional Responsibility: Myself
Submitted By: jo Jo-Ann Bezik

Hours To Complete: 0.5
Date Submitted: 02/10/2003
Complete By Date PLUS: 0

Task Flag
Time Class

Assist Me   Quit   Update

This definition is not too different from a normal Task Submission. You use ASSIST ME to change any of the Values, including the Functional Responsibility. Note that 'Date Submitted' refers to the date the Task is submitted to the Schedule, and whenever Tasks are 'launched' from the Schedule, the current Date will be used. 'Complete by Date PLUS' is specified as number of days allowed for completion, based on Date Submitted (launched). In this example, where '0' is stated, it means the Task should be completed on the same day that it is submitted. 'Task Flag' and 'Time Class' are optional Fields.

Edit

Re-defines a Task already on this Schedule

Import

Imports Tasks from a selected Schedule onto the current Schedule
(You select from available Schedules, and the system IMPORTS all
Tasks on the selected Schedule to your current Schedule. You may
then remove any unwanted Tasks from the Imported List.)

Remove

Offers Tasks on the current Schedule, you select which Task to remove

List

Lists your Private Schedules and the Tasks they comprise

Once you have a Private Schedule with 1 or more Tasks, you can use the LAUNCH
Function to submit these Tasks to the Queue, on demand, again and again.
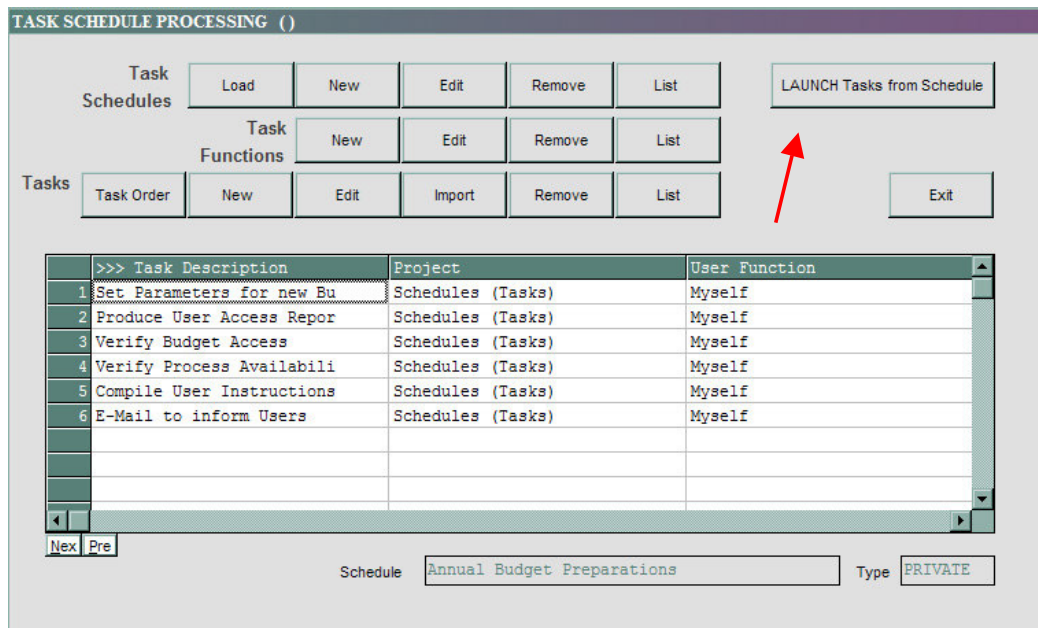
Note that there is no need to SAVE a Schedule. The system saves the latest
version automatically whenever a change is made to the Schedule.

When LAUNCH is used, the following happens –

```
LAUNCH TASKS FROM SCHEDULE  ()

  Launch Tasks from Schedule

                                          Schedule  Annual Budget Preparations

                                                                 Further Instructions
    Task List to Launch
  1 Set Parameters for new Budget
  2 Produce User Access Report
  3 Verify Budget Access
  4 Verify Process Availability
  5 Compile User Instructions
  6 E-Mail to inform Users



  Nex  Pre

            Re-Select Tasks to Submit              Submit AUTOmatically

                 Abandon                      Submit each Task with EDIT opt
```

The system indicates which Tasks will be launched. You may Re-Select the List, i.e. to launch only some rather than all of the Tasks.

Then, the idea is to use 'Submit Automatically', which will accomplish submission of the Tasks without any further steps, BUT, if necessary, you may choose 'Submit each Task with EDIT option', in which case the system will open a normal Task Submission Screen for each Task, allow you to edit any Values, then submit the Task, one by one.