Task Manager

User Guide – V 12.0

Parklane Systems
March 23, 2014

Table of Contents

Overview

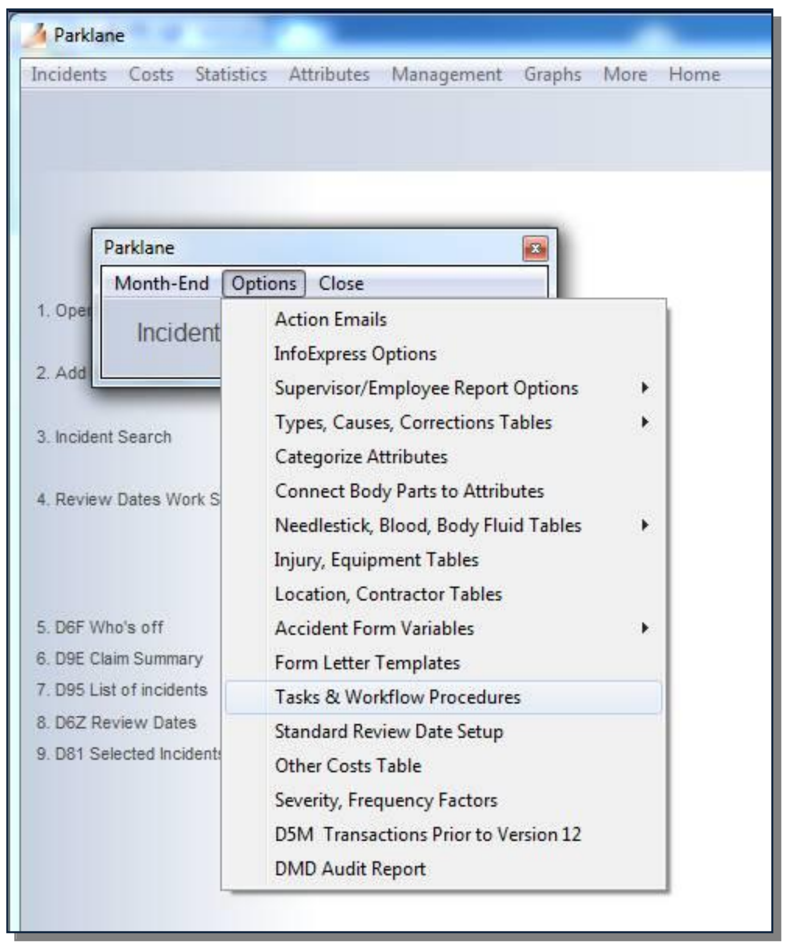
The Task Manager is an automated system which ensures that nothing "falls through the cracks" with regards to unaccepted or uncompleted tasks. In the background of the Task Manager module there is a sub-program which runs periodically comparing both acceptance required by and task completed by dates/times with their targeted dates/times in relationship to the current date/time at which the program is running. The sub-program is automatically set to run every 15 minutes enabling the Task Manager to escalate all tasks which have either not been accepted by or completed by their required dates/times. An e-mail notification is automatically sent to the escalation contact person advising them of this potentially significant situation. This ensures that all tasks are dealt with in a timely manner leaving no room for critical issues to "get lost in the shuffle" of a busy corporate work day.

The Task Manager module is available as an add-on to most of Parklane Systems' suite of Occupational Health and Safety software programs. This guide has been written using the Incident Reporting module as the example, however, the functionality and operation of the Task Manager will be the same throughout all applicable modules.

Defining Task and Workflow Procedures

Before tasks can be assigned, Task and Workflow Procedures must first be defined under **Options** in each module where Task Manager will be used.

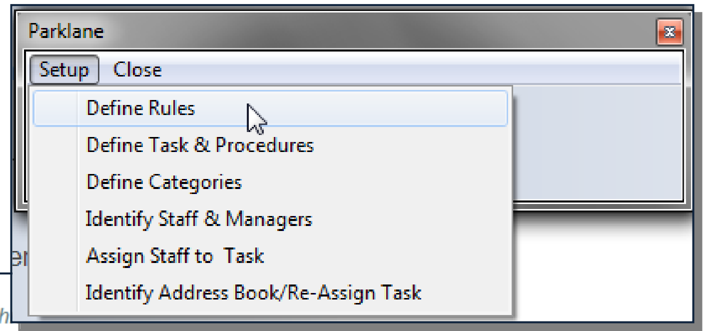
On the Incident Reporting main menu bar, click on **More**. On the Incident Reporting, part 2 pop up, click on **Options** and select **Tasks & Workflow Procedures**.

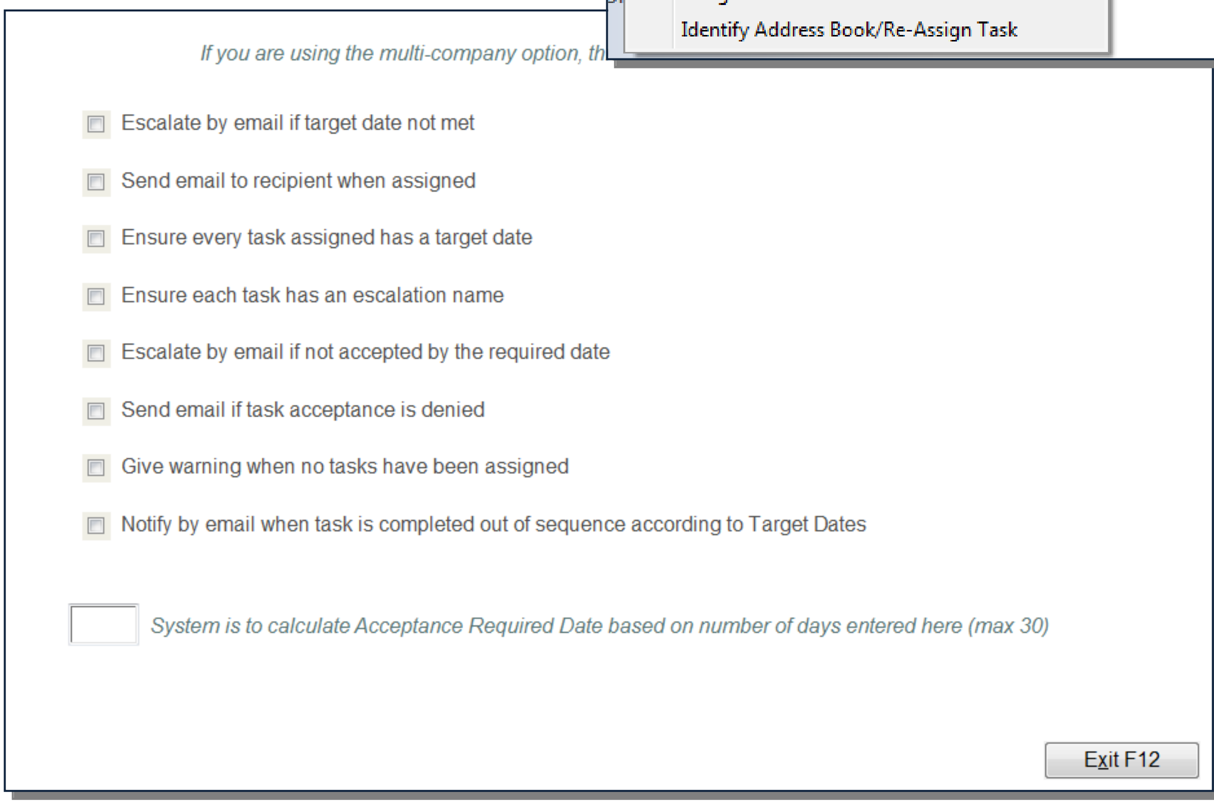


Define Rules

The **Task &, Workflow Procedures** pop up will appear with six options. Click on the first option, **Define Rules**.

The Define Rules panel will now appear with a number of options:





Depending on the rules and regulations which your company has decided to follow with regards to the various aspects of tasks, you may now choose to turn on any or all of the eight check boxes. The larger box found near the bottom of this panel may either be left empty or completed with a number from 1 through 30.

NOTE: If your company has purchased the multi-company option of Parklane Systems' module(s), the settings on this panel will apply to all companies and all modules.

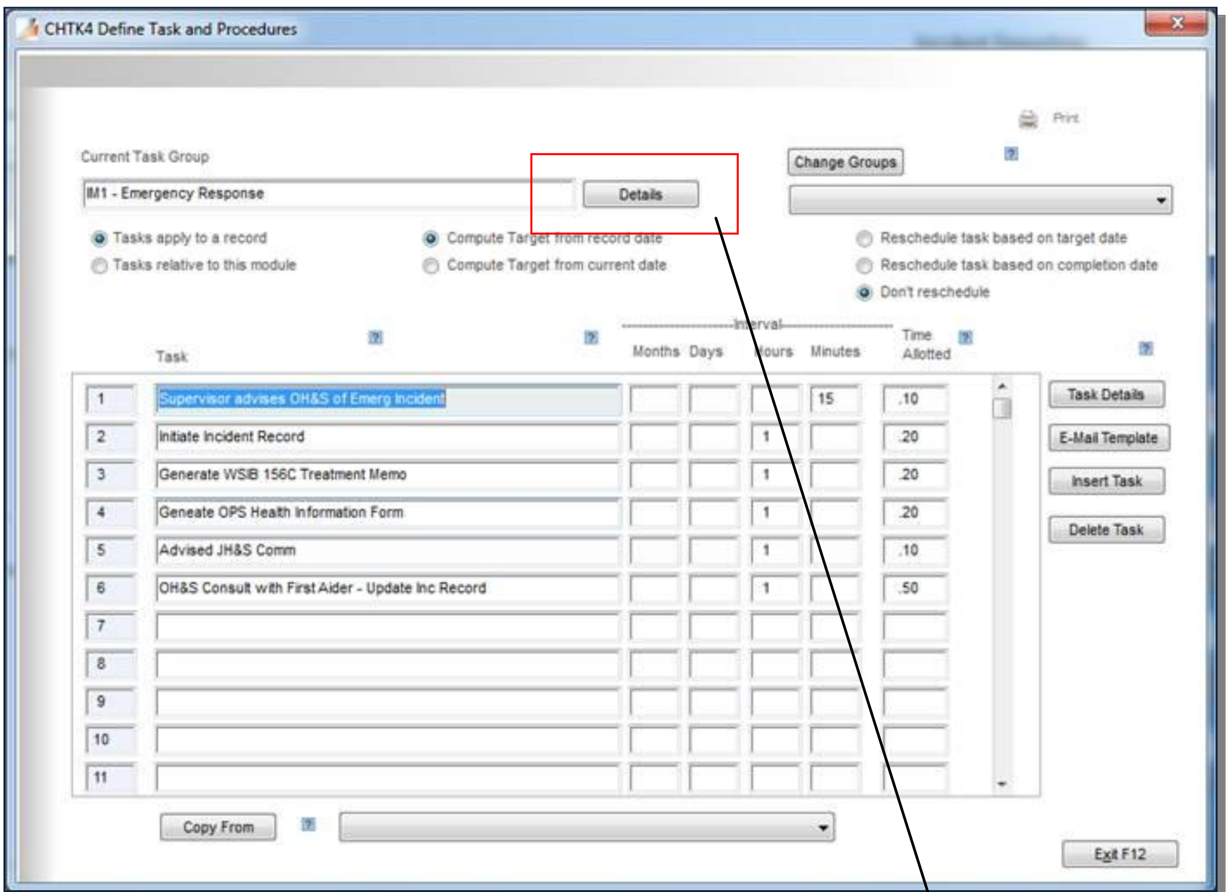
To return to the Task & Workflow Procedures pop up, click on **Exit F12**.

Define Task & Procedures

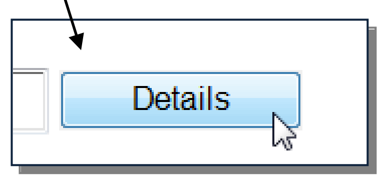
On the Task & Workflow Procedures pop up, click on the second option, **Define Task & Procedures.**

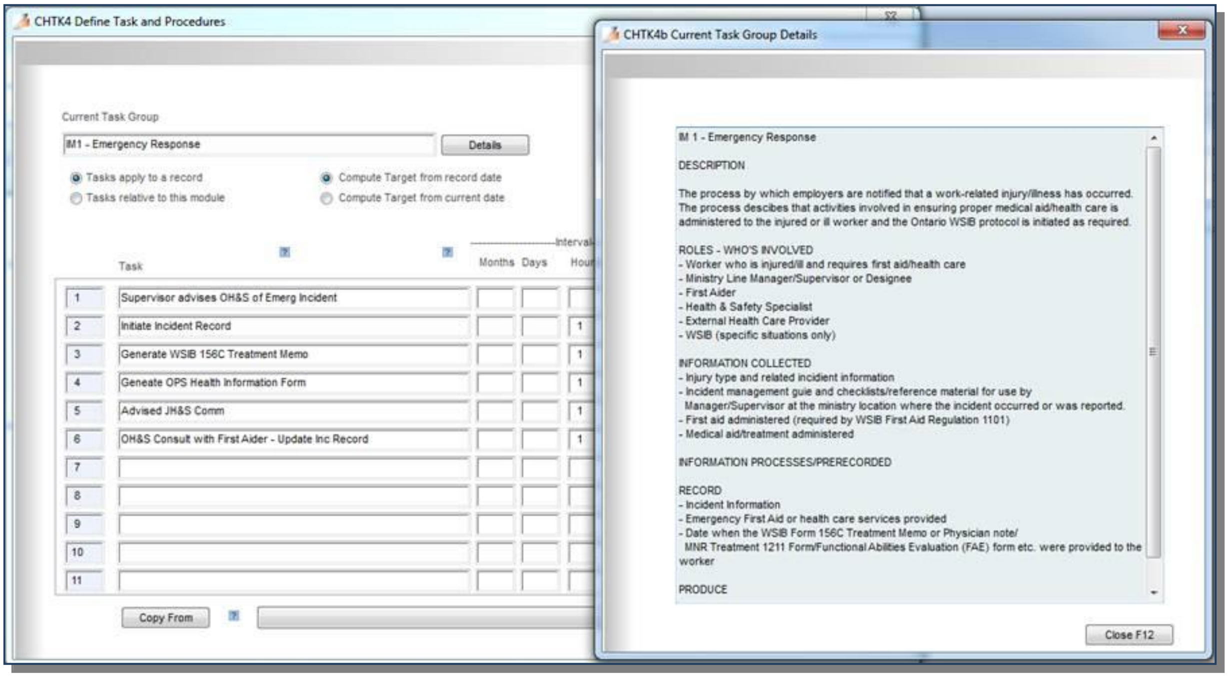
There are three main areas of this panel which will need to be completed:

In the **Current Task Group** field type in a brief description (up to 50 characters of text) for a task group which you wish to identify a series of related tasks.

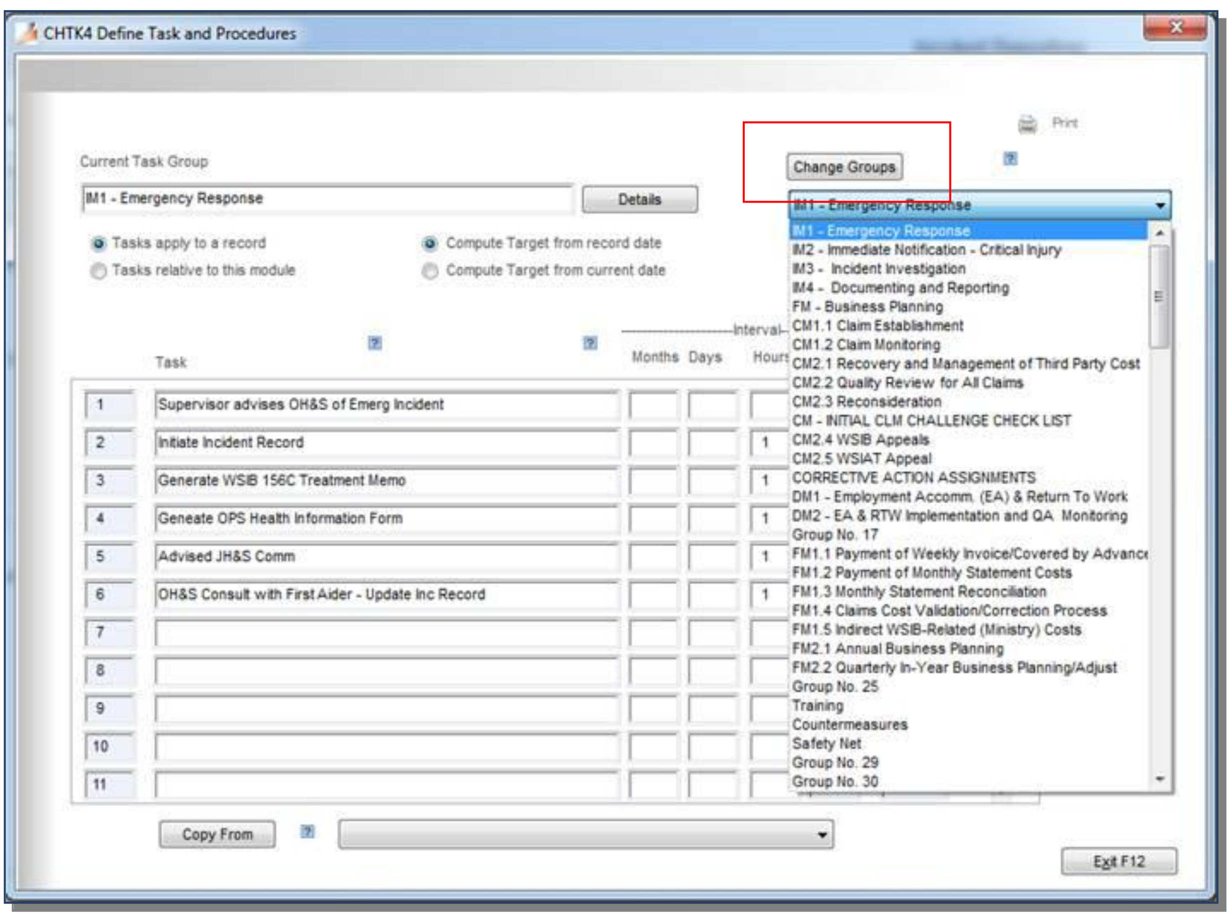


Click on the **Details** button and you will see a **Group Description** panel which will allow you to enter further details (up to 4980 characters of text) for the tasks included in this Task Group.



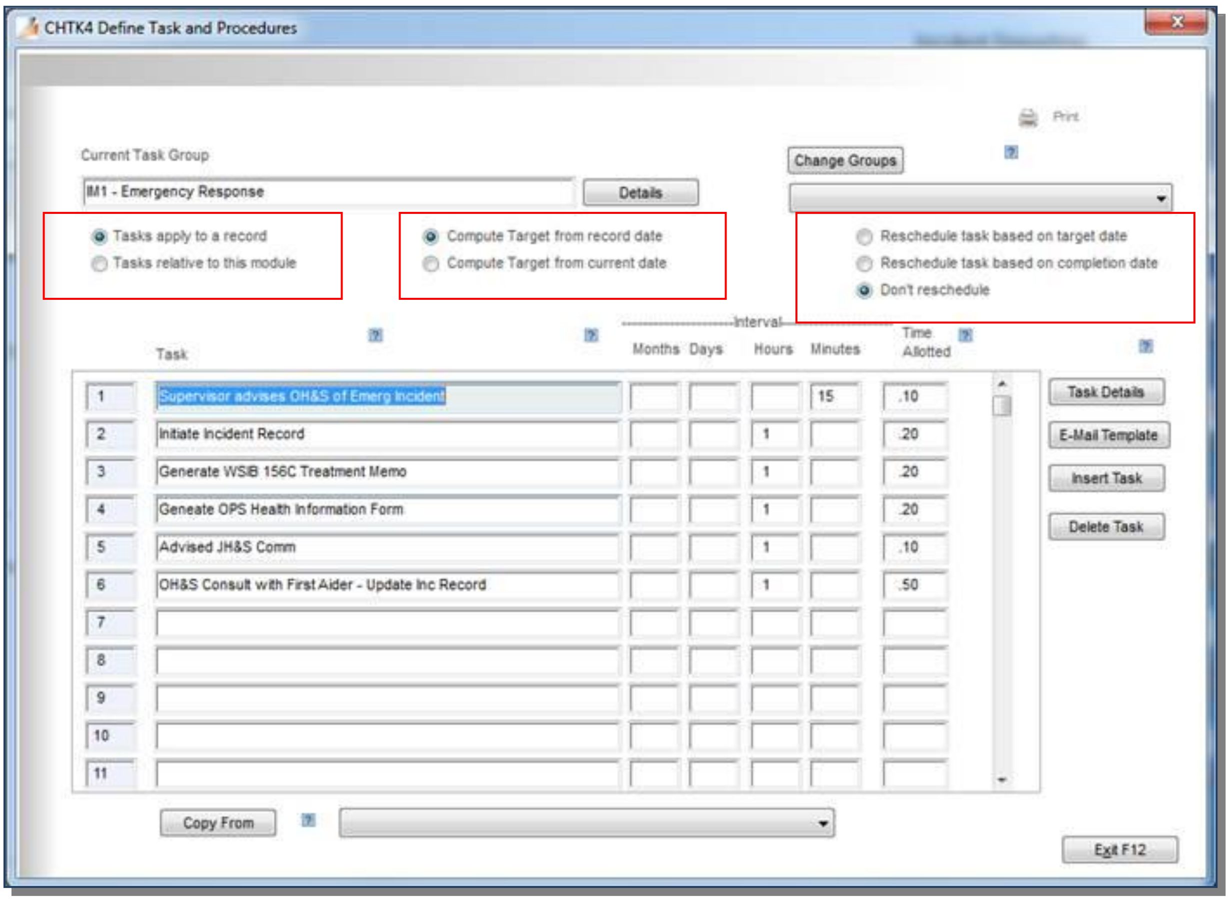


1. If you wish to add/modify/view tasks for a different Group, or create a new Task Group, click on the **Change Groups** button, click on the down arrow to show the list box, from the list box directly below choose either a previously named group (to modify or view) or the next available group number (to add). You may record up to 149 different Task Groups.

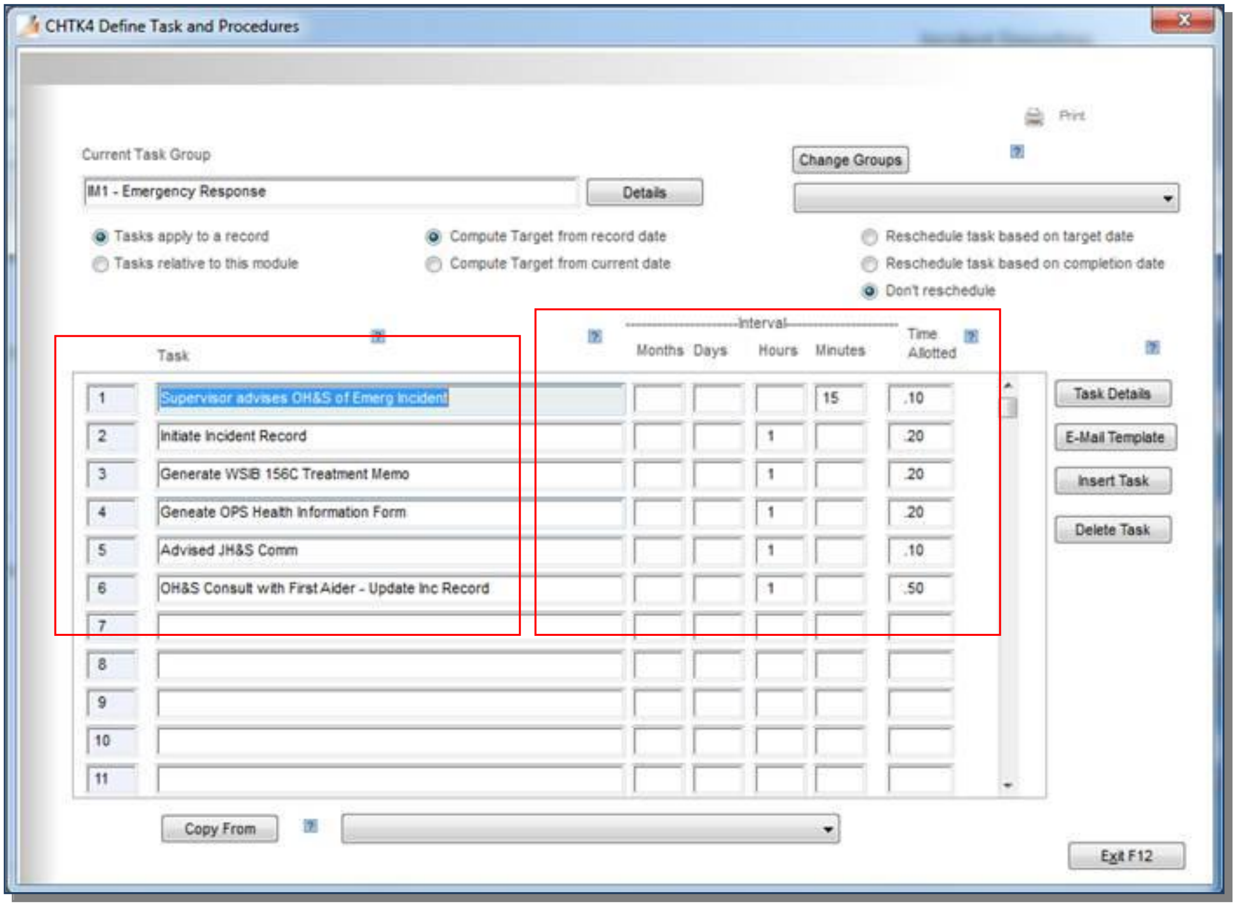


2. Turn “on” one of the radio buttons in each of the three sets to apply rules with regards to:

    - assigning tasks, either to the module in general or to specific incidents/events
    - the calculation of target dates, whether from the record date or the current date
    - the rescheduling of tasks, based on the target date, the completion date or not at all



3. In the first field of the **Task** area, type in a brief description (up to 50 characters of text) for a task which is to be part of this Task Group. In the next four fields, **Months, Days, Hours** and **Minutes**, complete the interval of time that is to be used to calculate the target date. The final field, **Time Allotted**, may be used to record the amount of time which the task should take. You may record up to 100 different tasks per Task Group.



There are push buttons found to the right and bottom of the panel:

Task Details – clicking on this button will provide you with a Task Description panel (similar to the Group Description panel shown previously) which will allow you to enter further details (up to 4000 characters of text) for the task currently highlighted in the Task field to the left. These task details will also be inserted into the lower body of the email task notification.

Email Template – Clicking on this button allows the customization of email text including the From, Subject & Body. When sending the email, an opportunity is provided to make changes to this template without affecting the original.

Insert Task – clicking on this button will insert a task line ABOVE the task which is currently highlighted in the Task field to the left. You may then complete a new task description and interval time in the inserted line.

Delete Task – clicking on this button will delete the task which is currently highlighted in the Task field to the left.

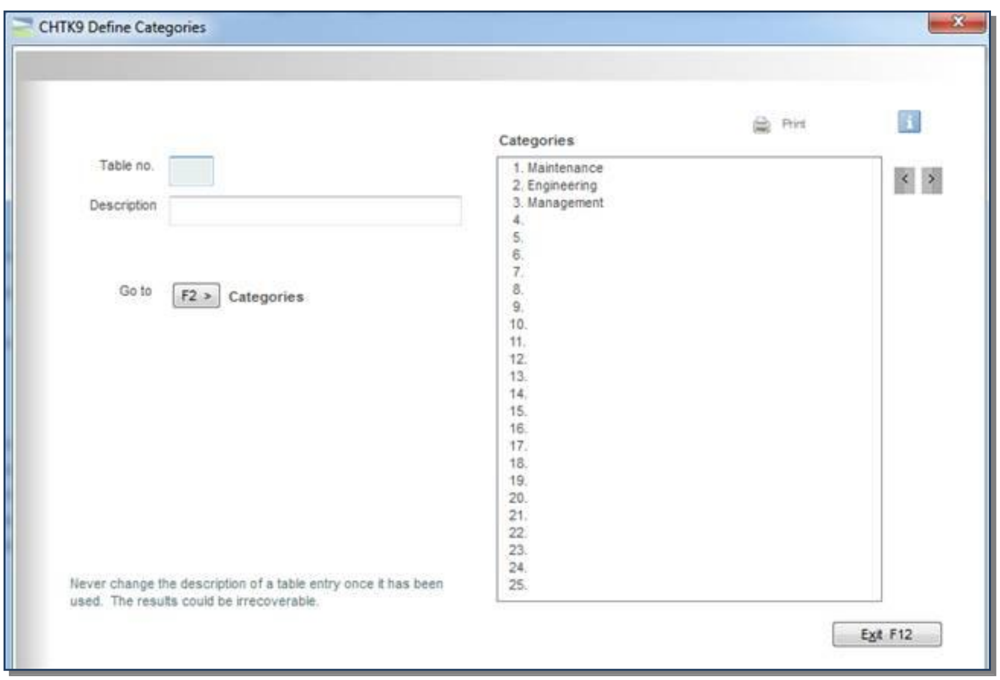
Copy From – (Bottom of panel) clicking on this button and then choosing a Task Group from the list box immediately to the right of the button will allow you to copy all tasks from the selected Task Group into the new Task Group which you are creating.

The **Print** icon at the top right of this panel will provide a report which lists all or current tasks found within Task Groups.

To return to the Task & Workflow Procedures pop up, click on **ExitF12**.

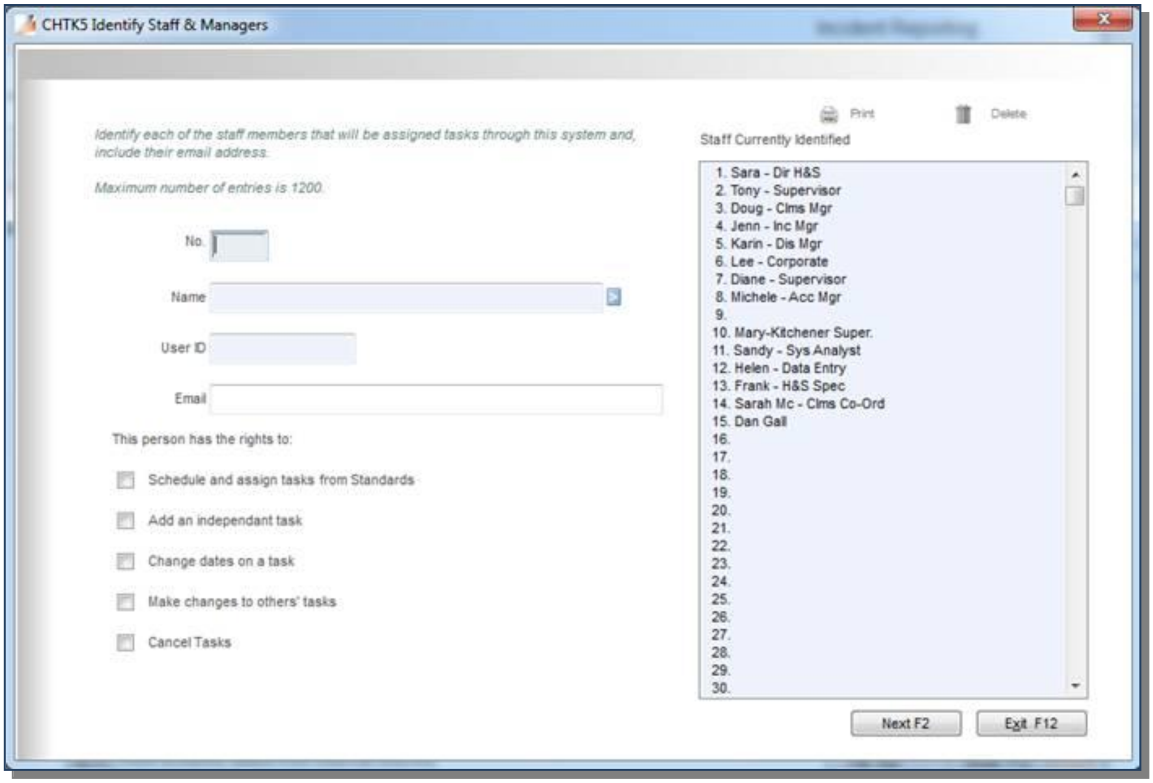
Define Categories

On the Tasks & Workflow Procedures pop up, click on **Define Categories** to build the table necessary to categorize the people and their emails in the Address Book. The Address Book provides the ability to add/import emails of people who are ***not*** user of Parklane in order to assign them tasks..



Identify Staff & Managers

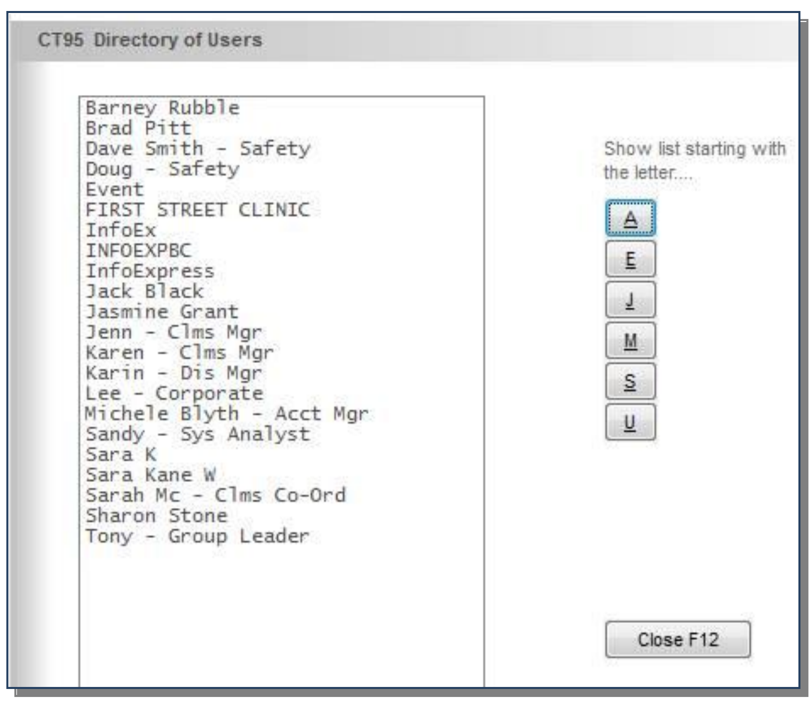
On the Task & Workflow Procedures pop up, click on the fourth option **Identify Staff & Managers.**



This panel allows for the set up of the individuals who will be assigned tasks. As well, each individual can be assigned their own set of rules with regard to such actions as scheduling, adding, changing and cancelling tasks.

In the No. field, enter the next available "blank" number from the Staff Currently Identified panel found directly to the right, then click on **Get** arrow next to the name field.

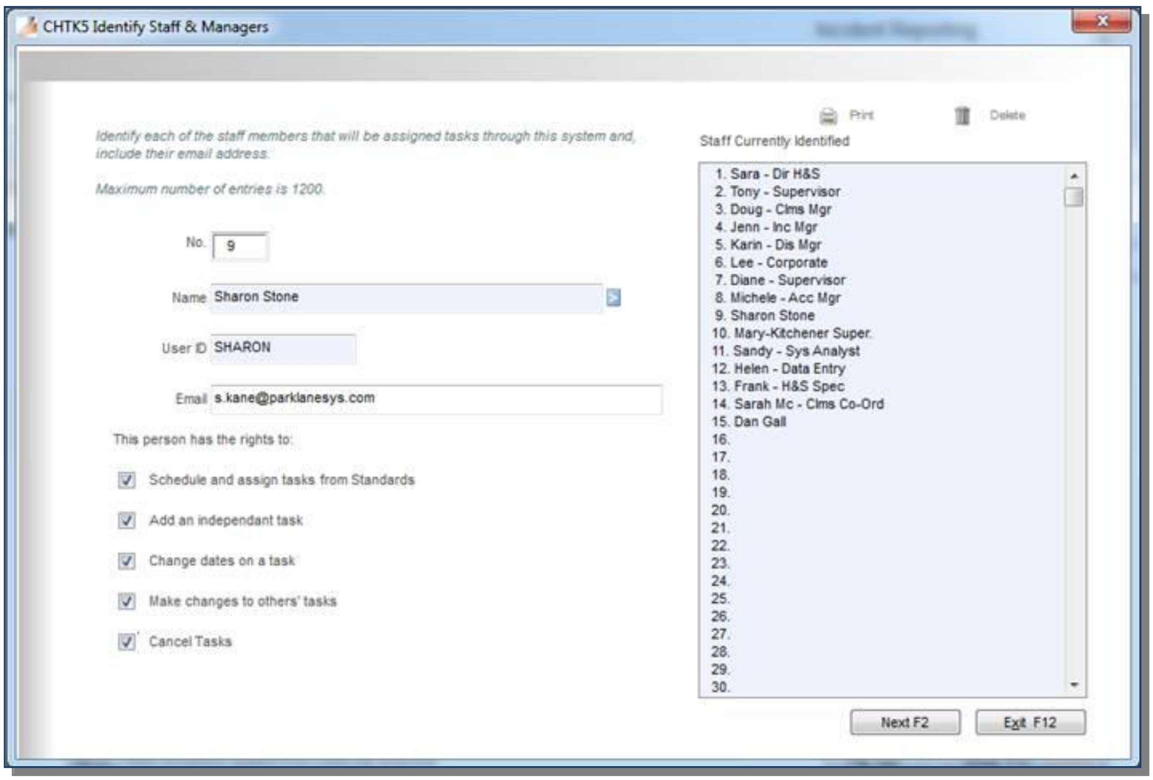
You will see the **Directory of Users** panel.



This panel contains the names of the people who have been previously set up in the Security area of your Parklane Systems' module.

Select the individual from the list by clicking on the person's name.

The Name, User ID and Email fields on the Identify Staff panel will auto fill with the information contained in the Security file. If the Email field is empty, type in the correct email address. The person's name which you have just added will now appear in the Staff Currently Identified panel to the right.



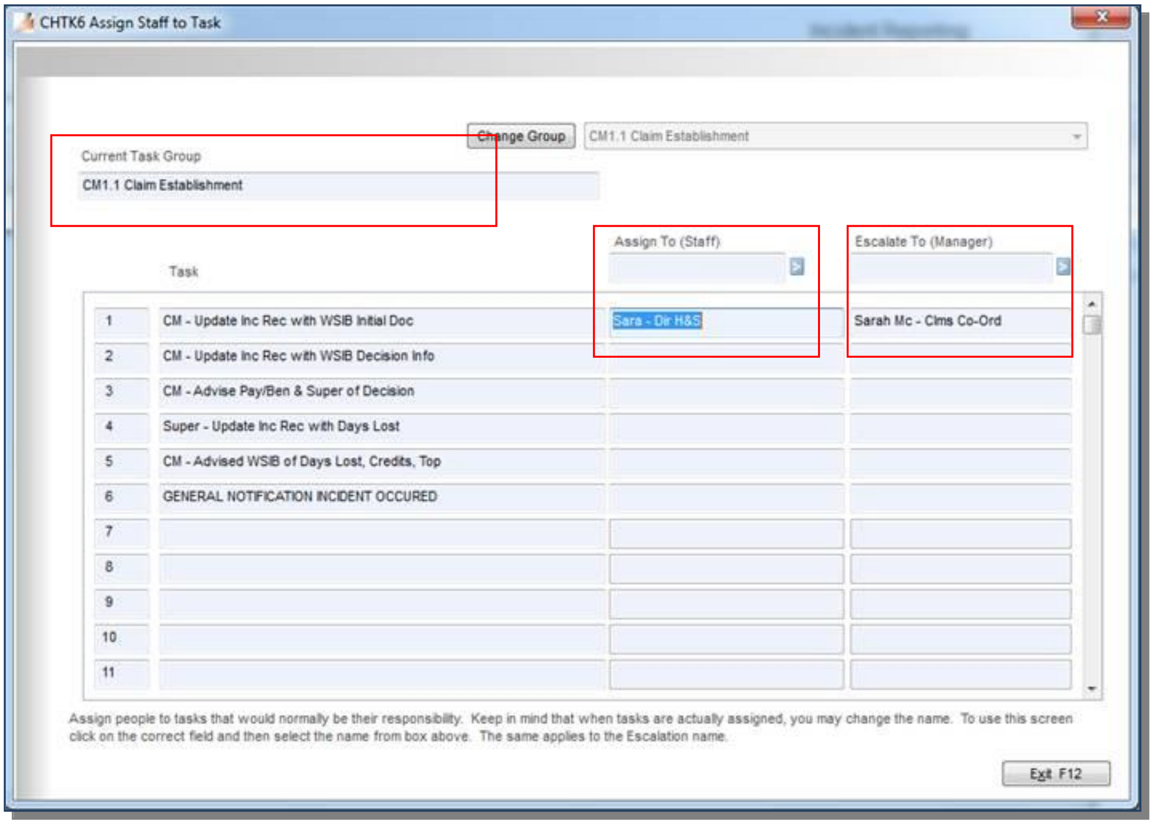
The **Print** icon at the top right of this panel will provide a report which lists all of the Task Staff, their log in ID's, Access Rights and their email addresses.

To return to the Task & Workflow Procedures pop up, click on **ExitF12**.

Assign Staff to Task

On the Task & Workflow Procedures pop up, click on **Assign Staff to Task.**

There are three steps to assigning individuals to a task:



1) Select the appropriate Task Group – if the **Current Task Group** is not the one you wish to access, click on the **Change Group** and from the list box directly to the right choose the required Task Group. All of the task(s) which have been previously assigned to this group will now appear in the **Task** field(s) below.

2) Within the chosen Task Group, select the **Assign To** field. To complete, click on the arrow on the list box directly above this field and search for the appropriate person.

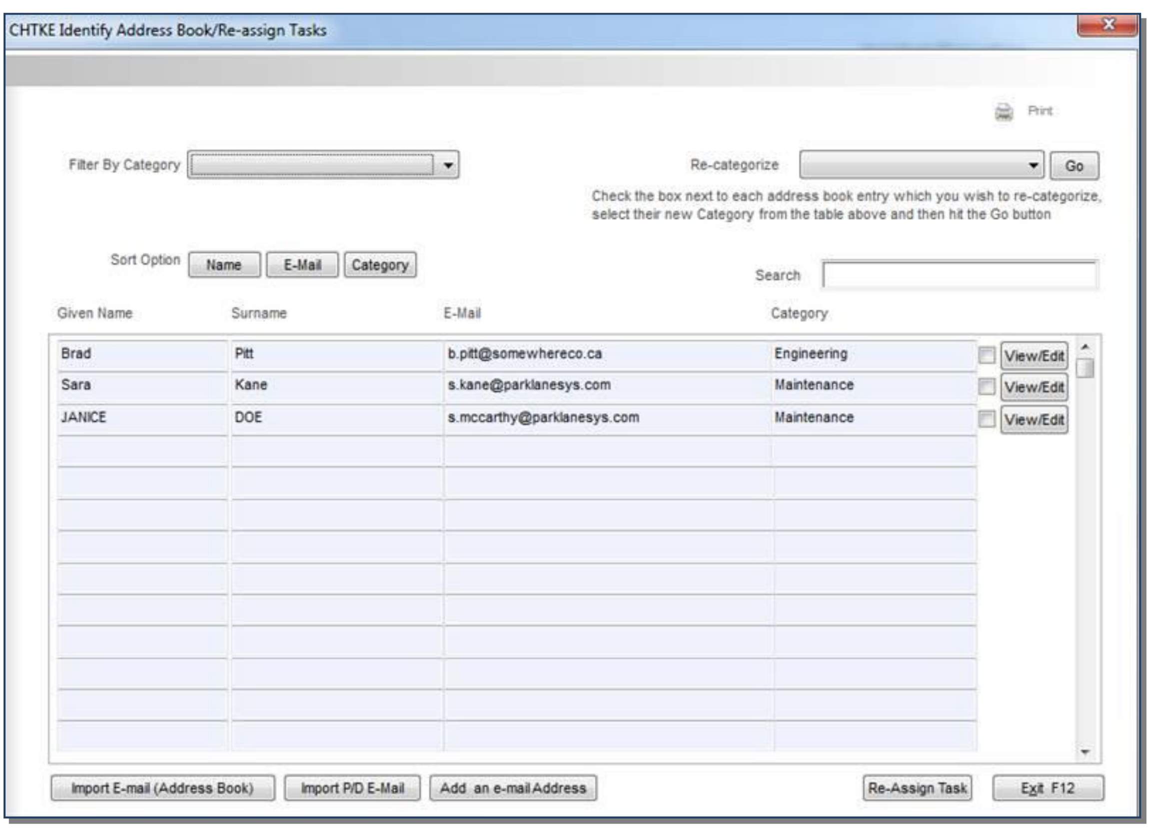
3) Within the chosen Task Group, select the **Escalate To** field. To complete, follow the same instructions as described in #2 above.

To return to the Task & Workflow Procedures Options pop up, click on **ExitF12**.

Identify Address Book/Re-Assign Task

The ability is provided to add/import emails of people who are ***not*** users of Parklane. The address book can be easily sorted to find an email or name. The people in the address book can also be categorized for easy sorting. Tasks can be re-assigned to another person in the event they are no longer responsible. The ability also exists to view and change an address card and to re-categorize a mass amount of email categories when necessary.

- Clicking **category drop down** you may filter your address book by category
- Clicking **check box** and then the re-categorize drop down and hitting **Go** will change the category of that person(s)
- Clicking **name**, **email** and **category** buttons will sort by that field
- Typing name or email, etc. in the **search** field with return the person(s) that exactly, or closely, match what you have typed
- Clicking **View/Edit** will open that persons address card and you can view their tasks
- Clicking **Import Email (Address Book)** button allows the import of an excel/txt type document to populate email addresses en mass.
- Clicking **Import P/D Email** button allows the import of those in Personal Data who have an email address populated.
- Clicking **Re-Assign** task will allow you to reassign tasks en mass if someone leaves the company.



Import E-mail (Address Book)

By following the instructions below, this import will allow you to create, or add to, your Task Manager email address book.

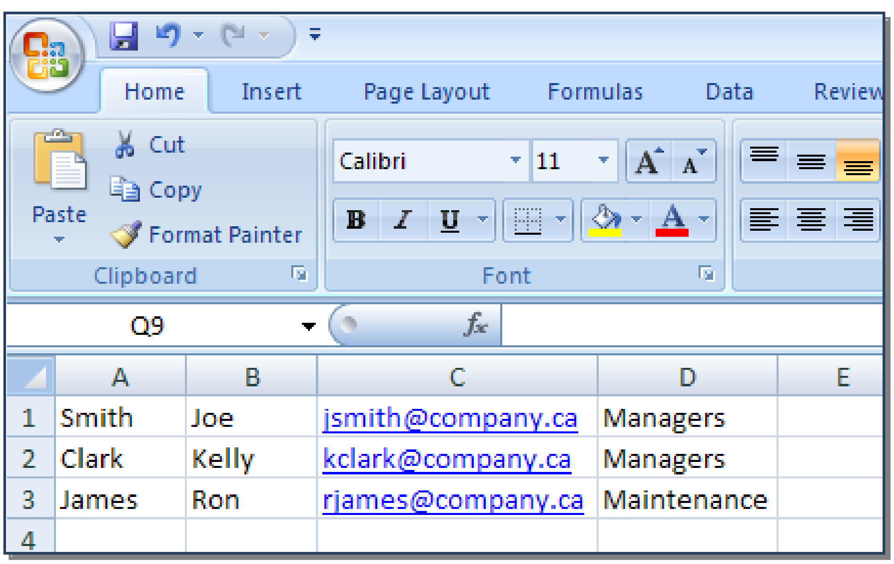
View Record Description

1. The file must be tab delimited txt file.
2. The file can be created with Excel.
3. For those who have multi-company option, one file must be created for each.

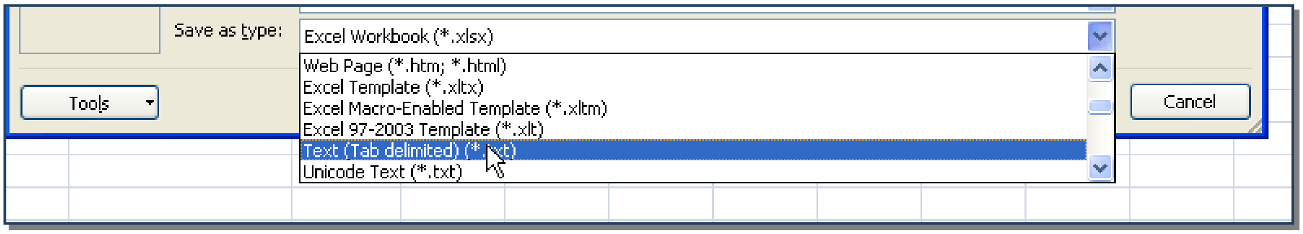
Record Definition

Column	Field Description	Alpha/Num
A	Surname	A
B	Given Name	A
C	Email	A/N
D	Category	A

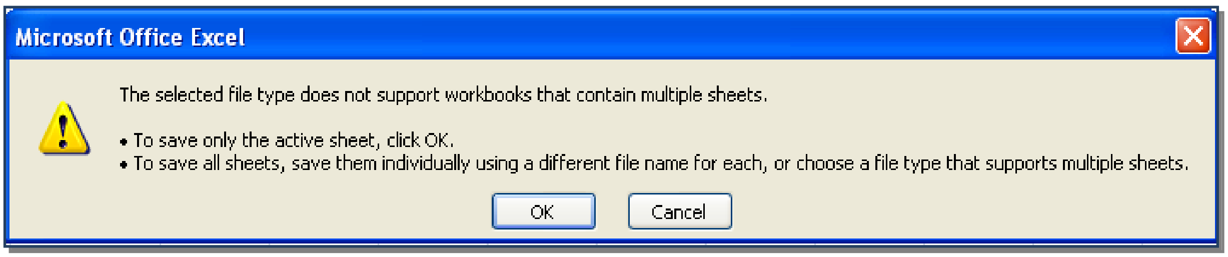
When creating your import file, your end result should appear as in the picture below and with ***no headings***.



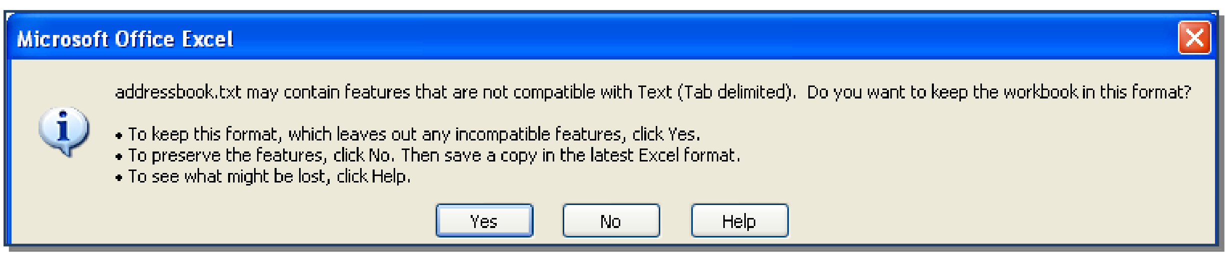
When saving the file, select Save as Type and choose “Text (Tab delimited)”



Close the file. Should you see this message, select OK:



When you see this message, select Yes:

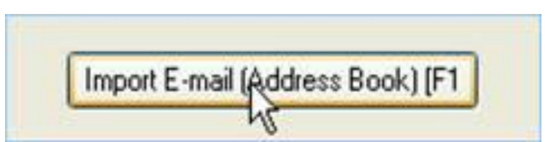


Continue to **Importing into Parklane** instructions.

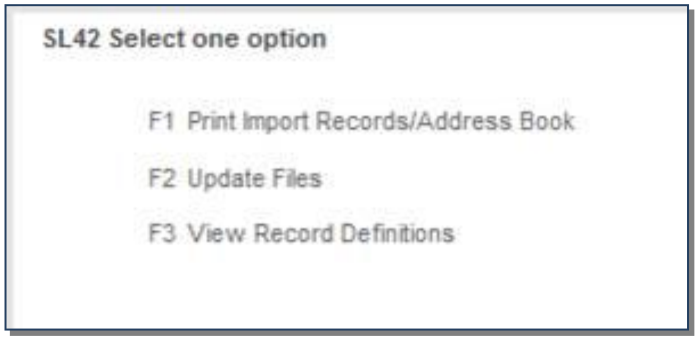
From the Task Workflow Procedures Options panel, continue with the following steps:

1. Identify Address Book/Re-assign Task

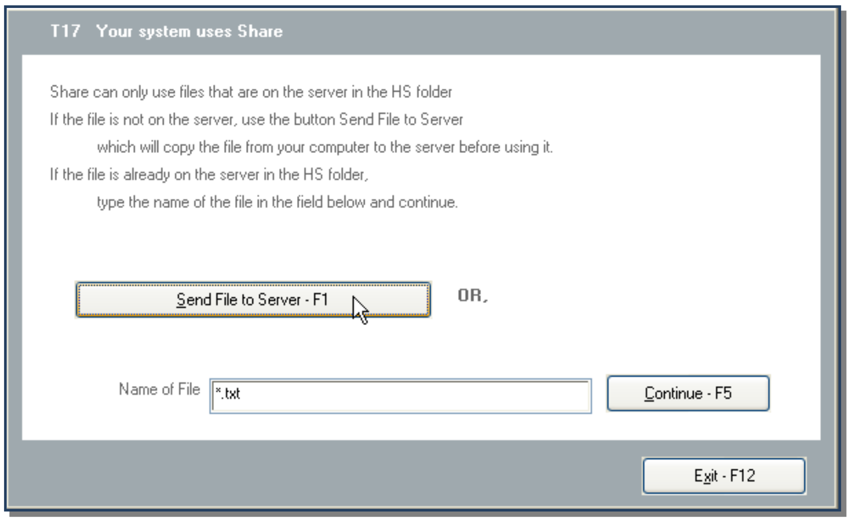
2. Import E-mail (Address Book)



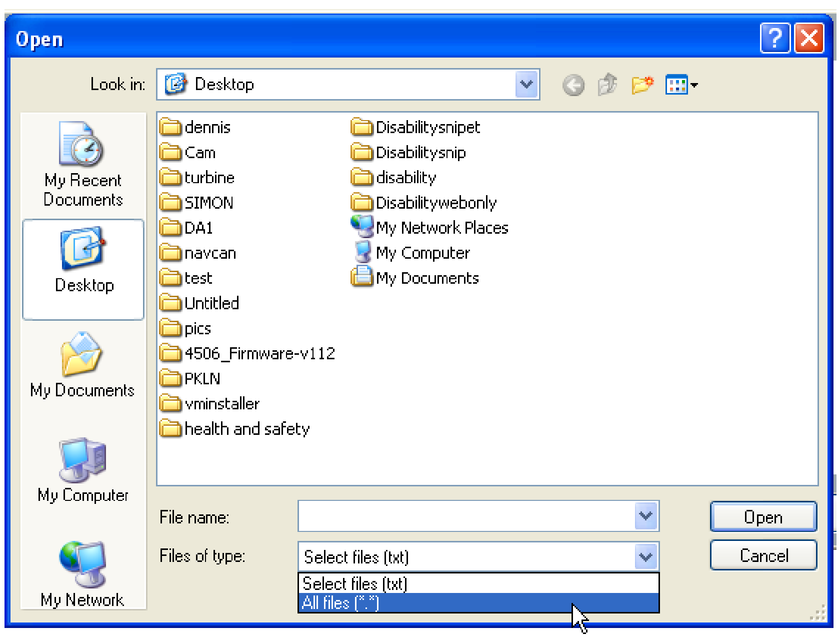
3. Update Files



4. Send File to Server

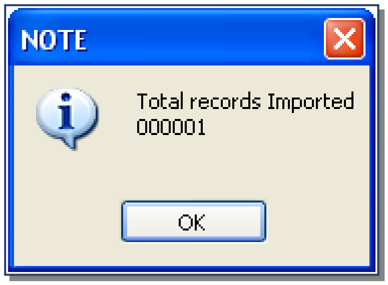


5. Find and select your file (you may have to search for All Files to locate it)



6. Click Open

7. When import is complete, a note will appear indicating how many records were successfully imported.



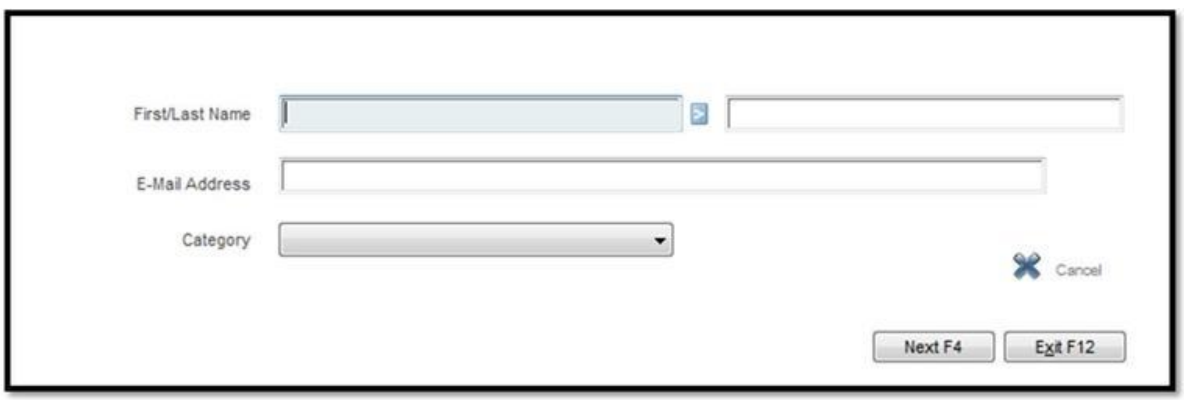
Import P/D E-Mail

This option allows for the importing/updating of email recipients from the Personal Data module. Click on the **Import P/D E-mail** and follow the screen instructions. A report will be produced identifying additions/updates.

Note: Only those with email addresses in Personal Data will import.

Add an e-mail Address

This option allows for the entry of an additional email recipient.

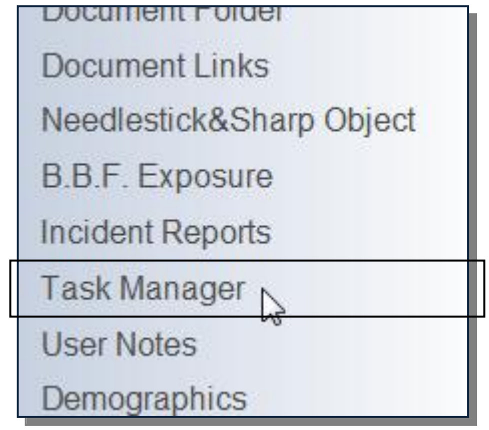


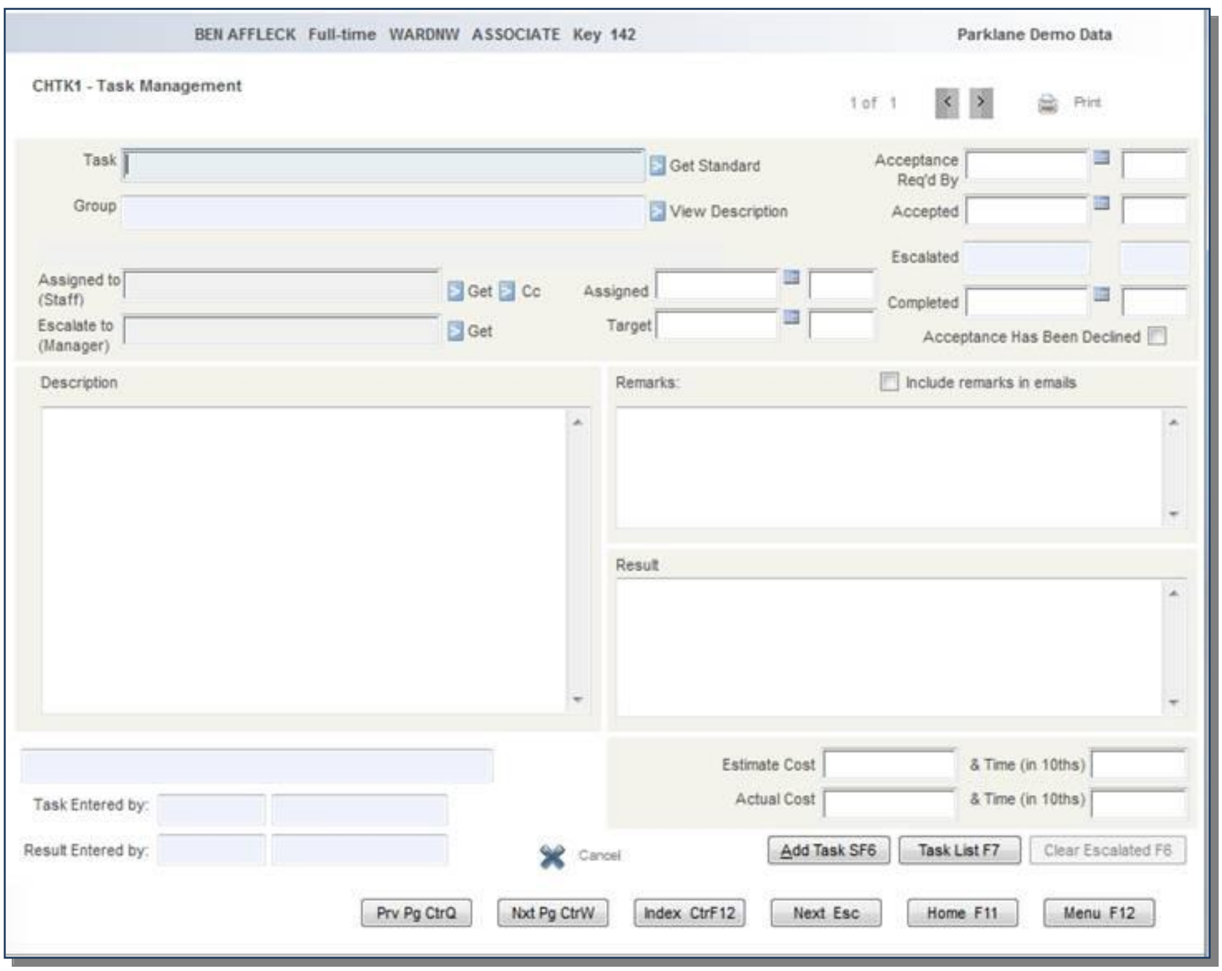
Assigning Tasks related to a specific Incident

Once an employee's incident has been recorded in the Incident Reporting module, undefined tasks or a series of default tasks may be assigned to individuals at any given time.

From the Sidebar menu, select **Task Manager**.

The Task Management panel will appear for completion.





- There is a counter (in this case “1 of 1”) found in the top right corner. As tasks are added the counter is continually updated. This counter aids the User in navigating through the numerous tasks which may be assigned to an incident.

- Some fields on this panel are locked and therefore inaccessible to the User. These fields are used by the Task Manager program to automatically record information such as an escalation date, entered by information (user ID and date), etc.

- The **Assigned to** (Staff) field MUST be completed before you can exit the panel. There are two other fields, **Escalate to** (Manager) and **Target**, which may or may not need to be completed, depending on the rules which have been assigned on the Task Management Rules panel (see Defining Task & Workflow Procedures for additional information).

- Once a task has been assigned, if the assignee clicks the **Acceptance Has Been Declined** box, the Task Manager program may or may not, depending on the rules which have been assigned on the Task Management Rules panel, automatically send an email to the Escalation contact person notifying them of this situation.

- The **Remarks** field allows for entry of any remarks (up to 500 characters of text) which may apply to a task. If you wish this information to appear in the e-mails generated by the Task Manager program, click on the **Include remarks in emails** check box.

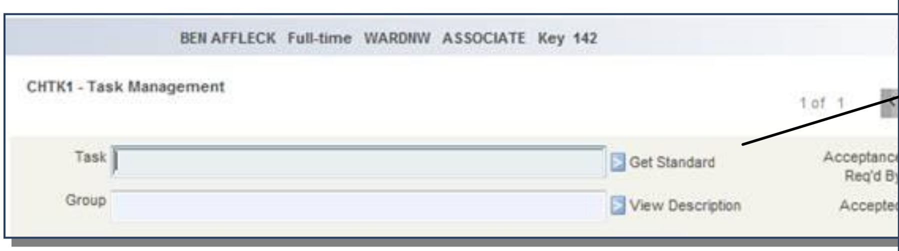
- The **Result** field may be completed by the Assignee upon conclusion of the task.

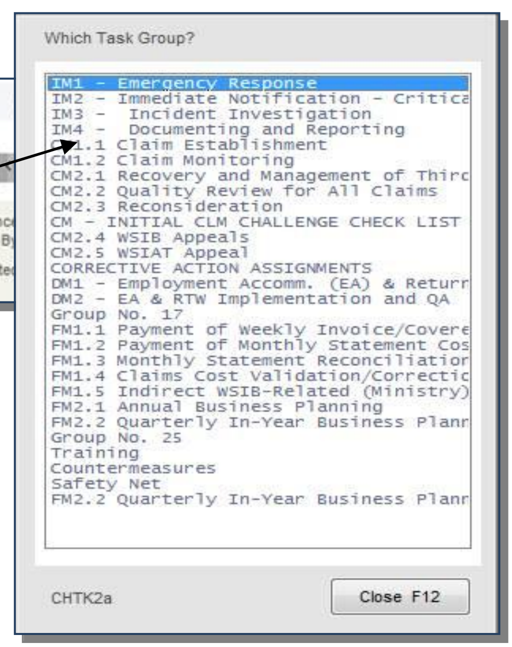
The User has two options available to them for completing/assigning task(s):

- Manually complete each field on the Task Management panel with the required information, or

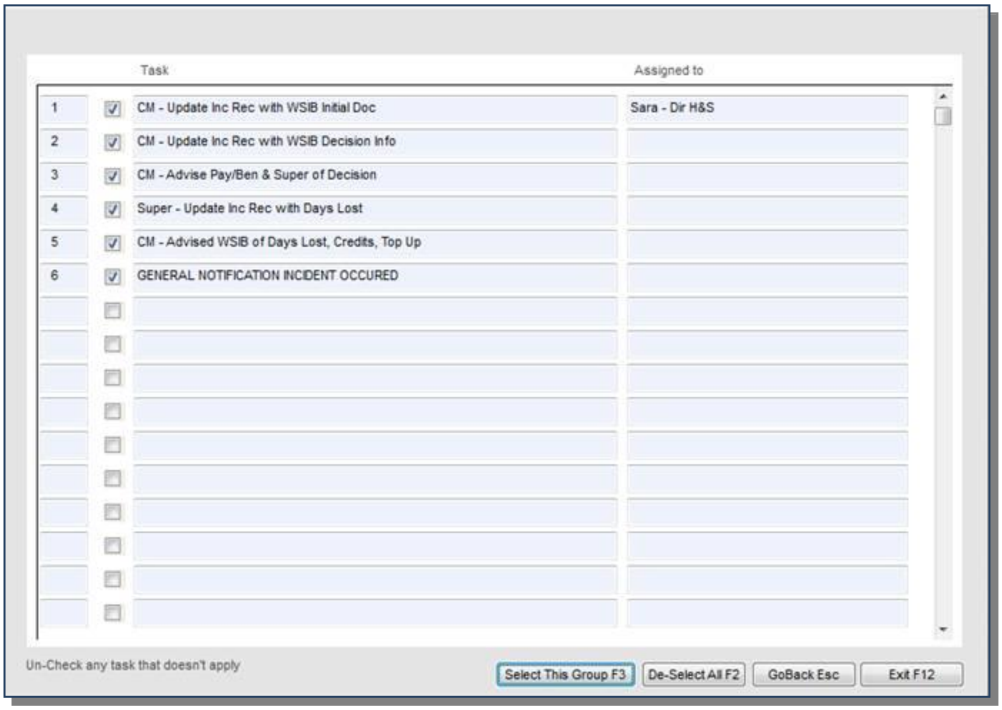
- Select a Task Group (detailed below) and the Task Manager program will automatically assign tasks based upon the information supplied by the Task & Workflow Procedures file described earlier.

To select a Task Group and its associated task(s), click on the **Get Standards** arrow and click on the Task Group you wish to select:





The Standard Tasks panel listing all of the tasks which have been assigned to the selected group will appear. Note the check mark which appears in the box beside each task.



You now have two choices:

- To select all of the tasks in this group, click on the **Select This Group F3** button, or
- To select only some of the available tasks, turn "off" the check box(es) beside the task(s) which you do not wish to assign, then click on the **Select This Group F3** button.

You will be returned to the Task Management panel:

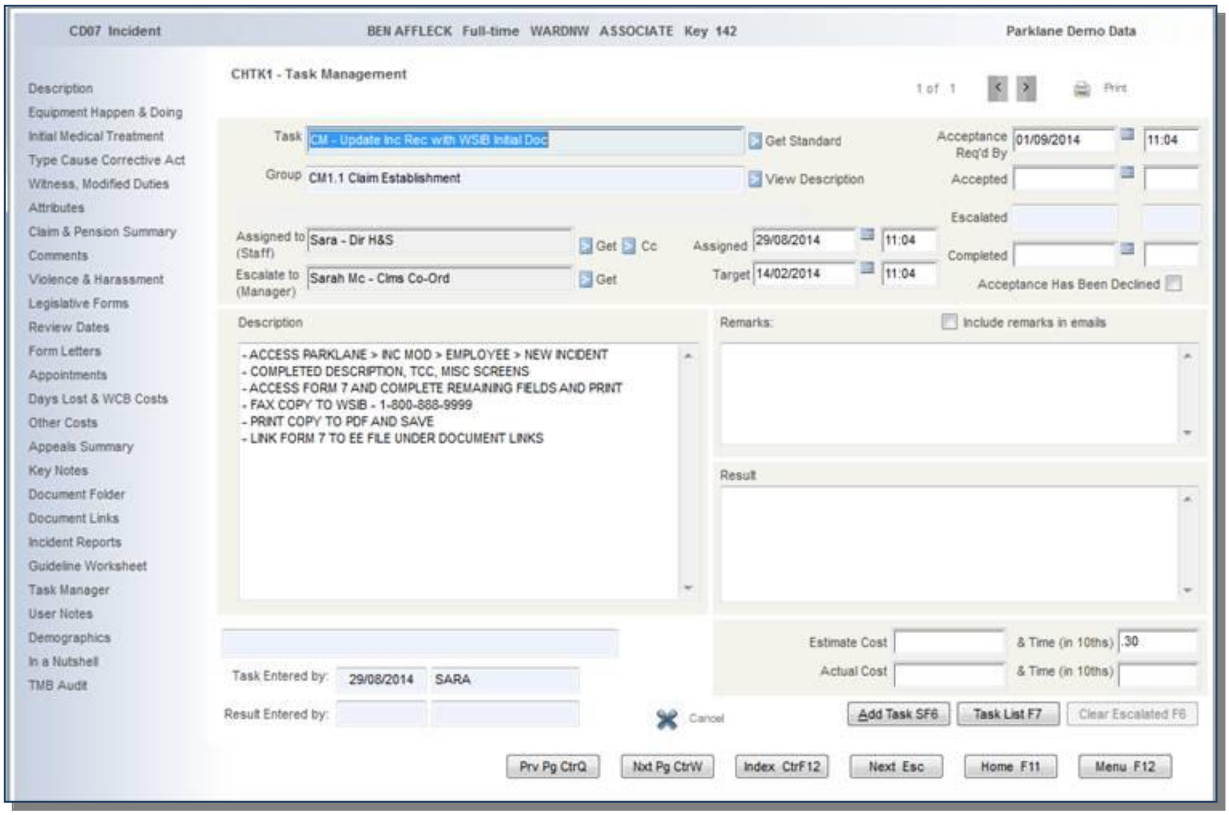
The **Task, Group, Assigned to (Staff), Escalate to (Manager), Description, Target Date & Time**, and **Estimate Time** fields will auto-fill with the information found in the Task & Workflow Procedures file for the Task Group selected.

The **Assigned Date** & **Time fields** are completed based on the current date & time supplied by your computer. If required, both of these fields may be changed.

The **Acceptance Req'd by** date & time fields may or may not be completed by the Task Manager program. If, on the Task Management Rules panel (see Defining Task, Workflow Procedures above for additional information) a number (between 1 and 30) was recorded in the last field, **System is to calculate Acceptance Required Date based on number of days entered here**, the Task Manager program will calculate the date according to the number supplied. If no number was recorded, the Acceptance Req'd by date and time fields are left empty.

If required, the User may now enter additional information in any of the fields on any of the task(s) which have just been created.

When exiting the panel, an email may or may not be automatically sent to the assignee upon exiting the task panel after the initial set up depending on whether or not the check box was turned on next to the **Send email to recipient when assigned** field on the Task Management Rules panel.



There are a number of options found on the Task Management panel:

The **View Description** arrow found immediately to the right of the Group field will provide the User with the Group Description panel documented previously.

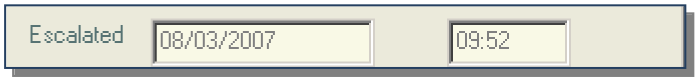
Click on the **Add Task SF6** button and you will be provided with the next available blank task panel so that a new task can be assigned/completed.

The **Clear Escalated F6** button will only be available for selection if the task which you are currently on has been escalated for any reason. This is intended for situations such as an escalated task which has now had the **Target Date** or **Acceptance Req' by** date extended.

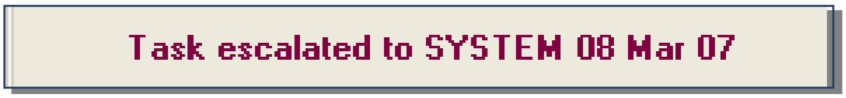
Clicking on the **Clear Escalated–F6** button will accomplish three things:

- it will clear the Escalated Date and Time fields found in the top right corner of the panel

AND



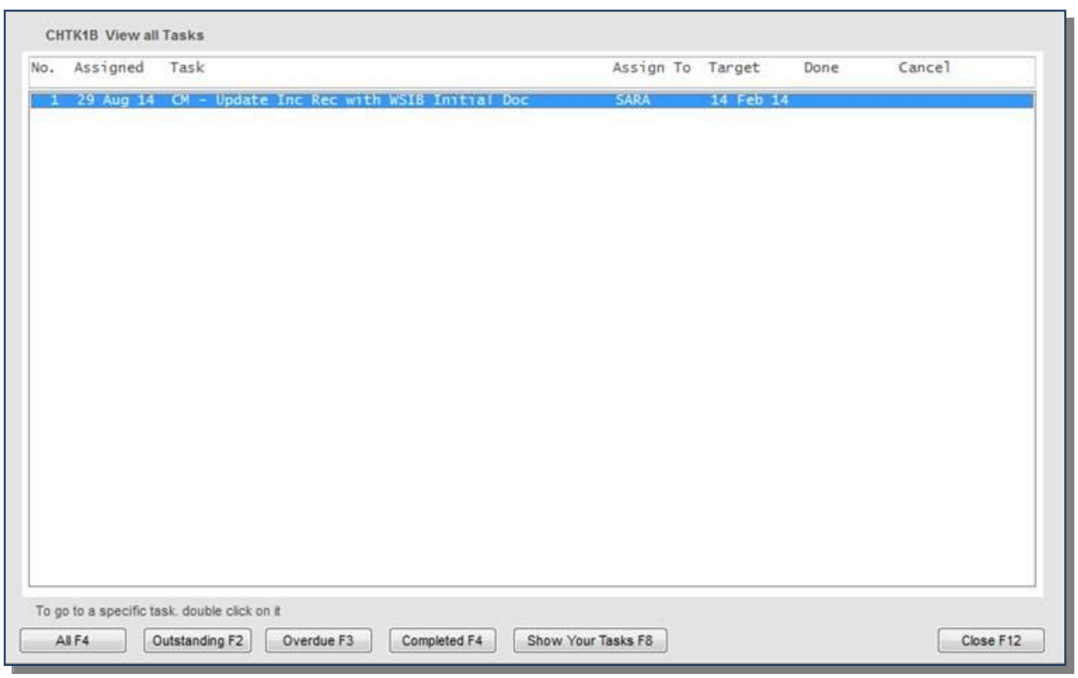
- it will also clear the task escalated notification found in the top left corner of the panel



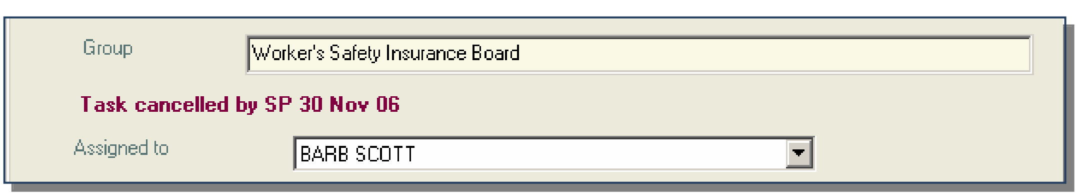
WHICH WILL THEN

- allow the task to be returned to the queue for tracking and possible escalation

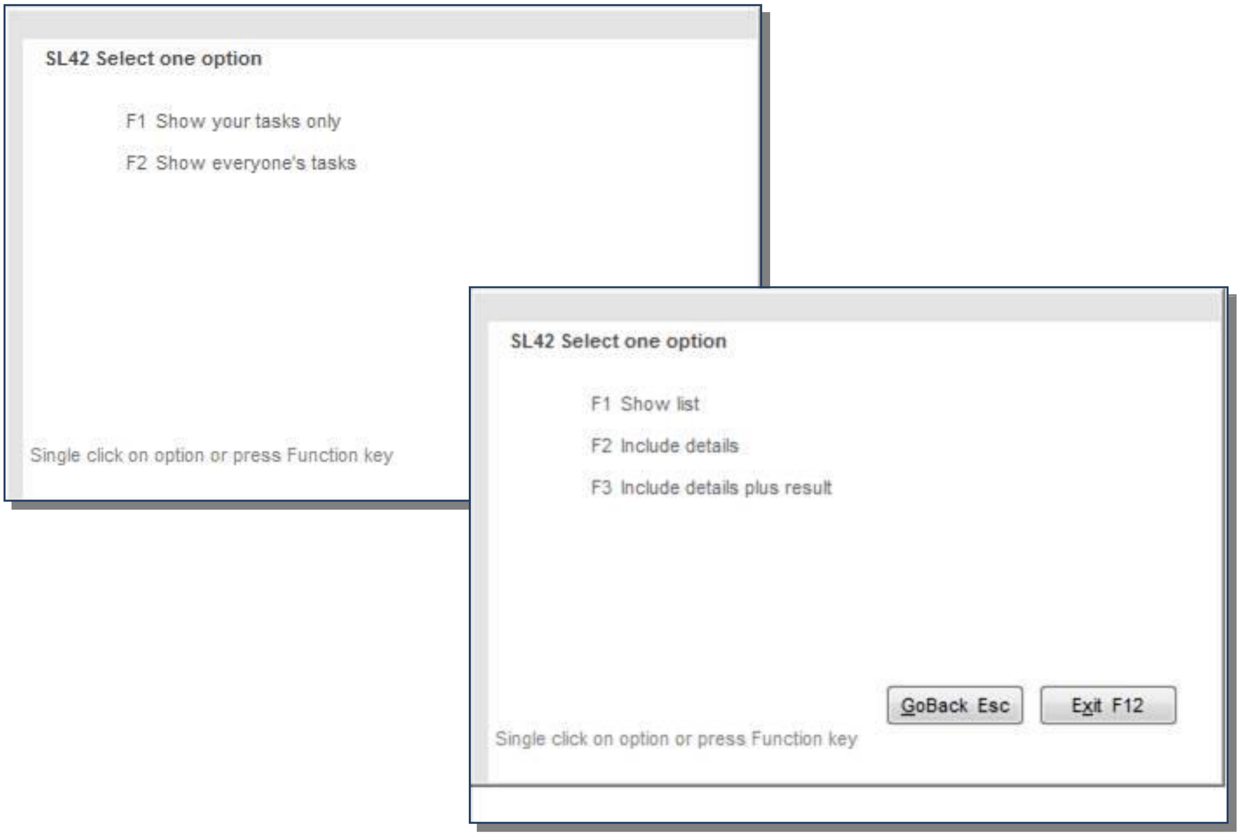
Click on the **Task List F7** button to see the **View all Tasks** panel. The push buttons on the bottom of the View all Tasks panel will allow you to view the tasks specific to the record in a variety of ways; **All F4, Outstanding F2, Overdue F3, Completed F4 or Show Your Tasks F8**.



Tasks can be cancelled if necessary by clicking **Cancel**. The task which you are currently on will be cancelled or deactivated. Cancelled tasks will not be escalated if not accepted or completed on time. A cancelled notation will appear below the Group field alerting Users to the status.



Click on the **Print** icon and two print option panels will be provided.



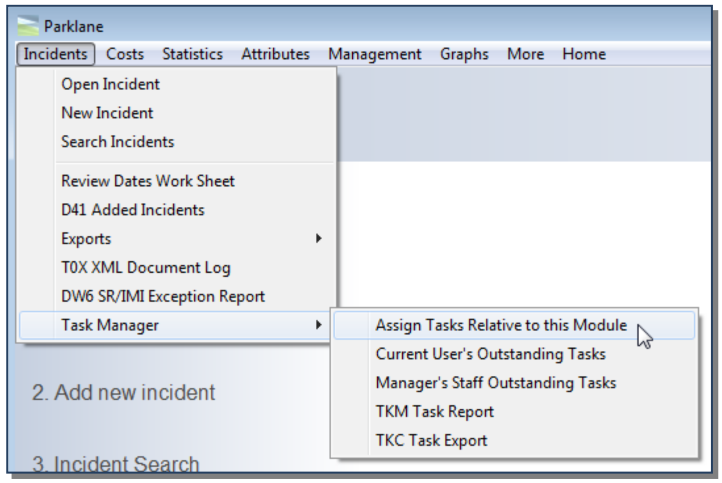
A task report will be produced based on the criteria chosen.

Click on the **Page Back** arrow to return to the previous task in the sequence (ie: if you are on task “3 of 5”, you will be returned to “2 of 5”).

Click on the **Page Advance** arrow to move forward to the next task in the sequence (ie: if you are on task “3 of 5” you will presented with “4 of 5”)

Assigning Tasks Relative to a Module

There may be times when it is necessary to assign tasks which are relative to the overall module and not to a specific incident/event/occurrence. For example, it may be a task assigned to the User regarding their job responsibilities.



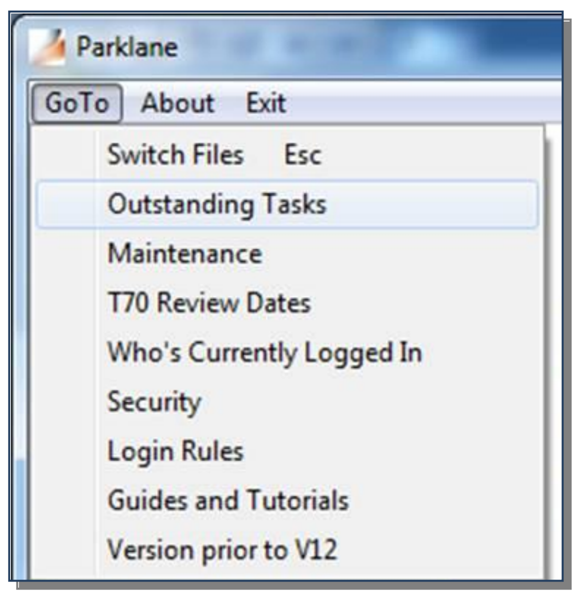
To do this, on the Incident Reporting module Main Menu screen click the Incidents drop down and **Task Manager**, then select **Assign Tasks Relative to this Module**.

The Task Management panel will appear for completion.

The format and functionality of this Task Management panel is identical to the one described previously.

Task Manager Reports

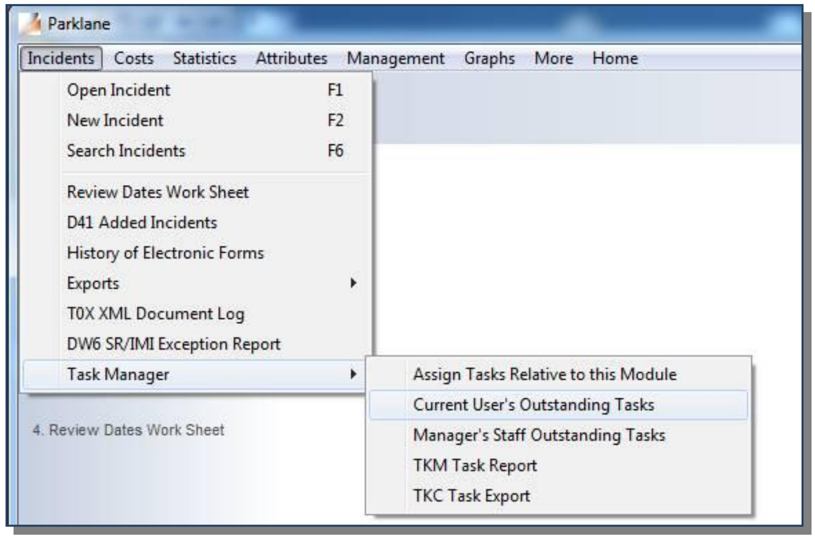
All of the task manager reports will include both the tasks which are specific to incidents/events/occurrences, etc. and those which are relative to the module(s) in general.



There are two options available to the User for the viewing/printing of task reports:

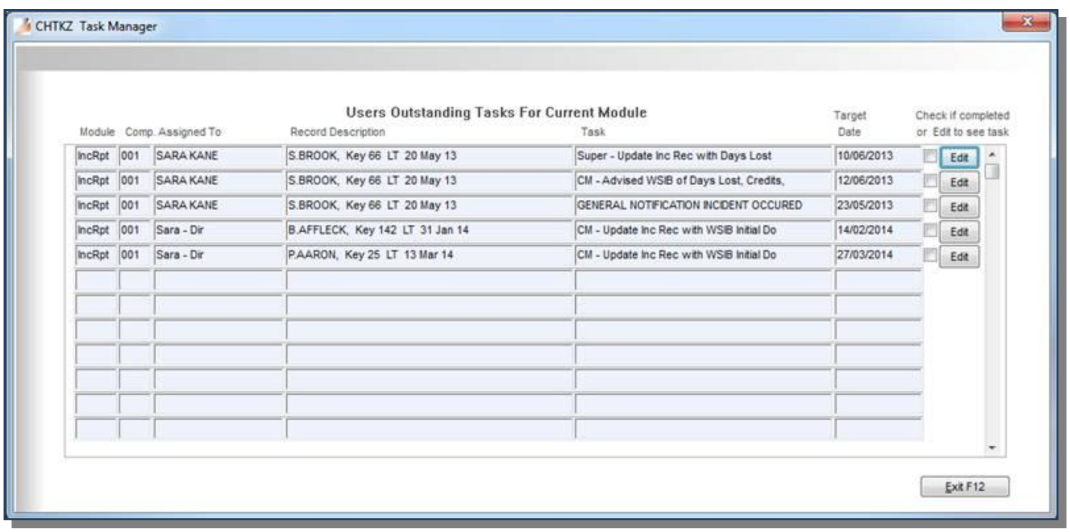
To view/print all tasks assigned to the User throughout all of the modules, which the User has access to, click on **Go To** then **Outstanding Tasks** from the Parklane Systems' Main Menu panel.

Alternatively, to view/print tasks specific to a module, select the module (in this case Incident Reporting) from the Main Menu panel, click on **Incidents** and then **Task Manager** on the Incident Reporting panel. Make the report selection which best suits your needs from the four choices; Current User's Outstanding Tasks, Manager's Staff Outstanding Tasks, Task Report or Task Export.



Outstanding Tasks (User's tasks from all modules)

Once you have selected the Outstanding Tasks option from the Parklane Systems' Main Menu panel you will be presented with the Task Manager panel:



This panel will allow you to:

- Mark a task as complete by clicking on the check box directly to the right of the selected task's target date, the3 current date and time will auto-fill on the task record.

  or

- Modify the task by clicking on the "Edit" button which will open the attached Task Management panel allowing you to make the necessary changes/additions.

Current User’s Outstanding Tasks

This option will present the User with a Task Manager panel, as shown previously, which lists all of the User’s uncompleted or outstanding tasks for the module which the User is currently in. The functionality of completing or editing tasks is the same as described above.

Manager’s Staff Outstanding Tasks

This option will present the User with a Task Manager panel, as shown previously, which lists all of the incomplete or outstanding tasks for the module which the User is currently in, and which are assigned to other staff members but which may be escalated to the User at some point in time. The functionality of completing or editing tasks is the same as described above.

Task Report

This option will allow the User to print a variety of reports which will show tasks within the chosen module assigned to all individuals.

The User’s chosen criteria from the various selection panels will determine what will appear on the report:

Task Export

This option will allow the User to export data showing tasks within the chosen module assigned to all individuals

The User's chosen criteria from the various selection panels will determine what will appear in the export, which can be generated directly to Excel.

The information contained within the file can be easily manipulated. This powerful and extremely convenient feature will allow you limitless possibilities for creating customized reports, providing you with exactly the information you require in a format of your choosing.

The following fields of information are included in the Incident Task Export:

Assign to
Description (from Task Manager Panel)
Incident Report Date
Employee Key
Task (description)
Assign Date
Assign Time
Target Date
Target Time
Completion Date
Completion Time
Declined

Acceptance Required Date
Acceptance Required Time
Acceptance Date
Acceptance Time
Escalate To
Escalate Date
Escalate Time
Estimate Time
Estimate Cost
Actual Time
Actual Cost

NOTE: Fields will vary based on the module from which you are exporting tasks.

Index

A

C

D

I

M

O

R

T

V

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