insol6

Tasks

About this manual

This module deals with all the basics aspects of tasks. Firstly, a task can be considered as an action that needs to be performed, or a checklist item that needs to be completed.

A user can review their tasks at anytime and manage their priorities and workload.

One of the exceptional aspects of tasking is the ability to link tasks to actions, which allows users to perform functions directly from a task without having to navigate through the Job menus.

The task reporting options assist managers to review outstanding tasks by viewing their employees' tasks that have been completed, outstanding, due by the end of the week et cetera.

It is intended that your current checklists are created as task templates which can be imported into a Job when it is created.

At the completion of this module, you will be able to:

- View a user's Tasks
- Create a Task Template
- Import a Task Template to a Job
- Link Actions and Resources to Tasks
- Linking your output back into your Task
- Review multiple user's Task Lists
- Produce Task reports using specific selection criteria

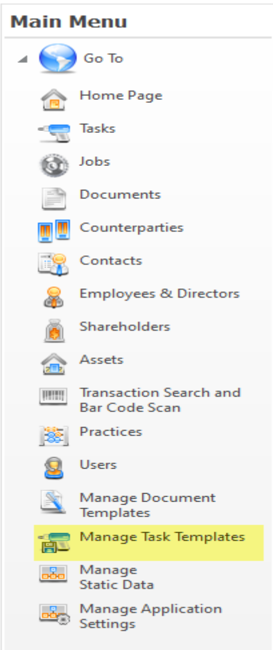
Your Tasks list

You may view a list of outstanding tasks for the current user, across all jobs by clicking **Task** on the **Main Menu.**

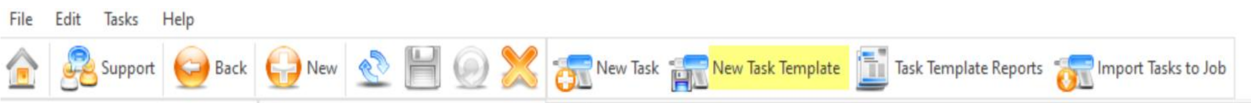
When a user opens the software, the **Outstanding Task List** appears by default. The filter options of the **Task List** may be further refined to display other user's tasks, tasks between a range of dates and specific category of tasks. The task list may also be grouped by column header such as the Category, Job or User.

Creating a new Task Template

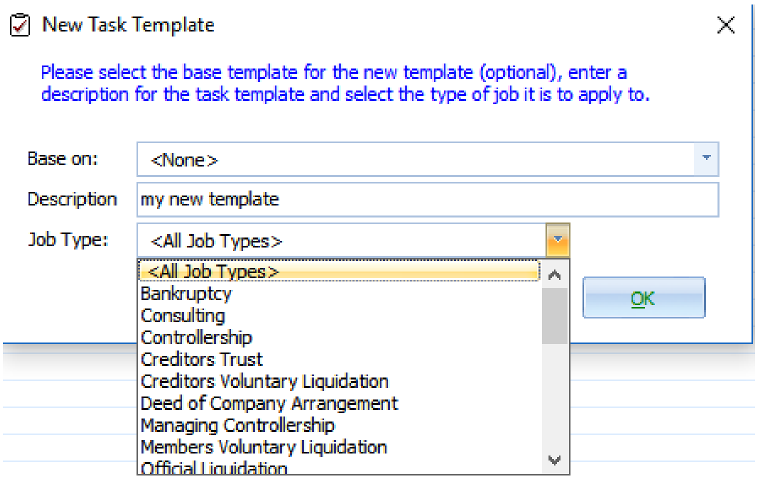
1. Click on Manage Task Templates from the Main Menu:



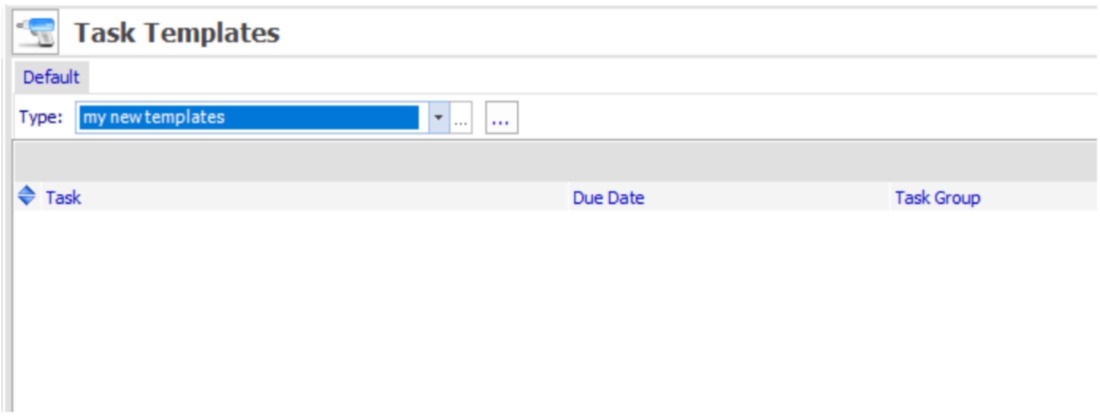
2. From the Standard Toolbar, select New Task Template:



3. As we are creating a template from scratch the BASE ON: will remain <none>.
   Set:
   DESCRIPTION: will be what you want to call your new template
   JOB TYPE: You can set this template to be used on all job types or on a specific job type only.



4. Click OK and you return to a blank screen with the default type being your new template.

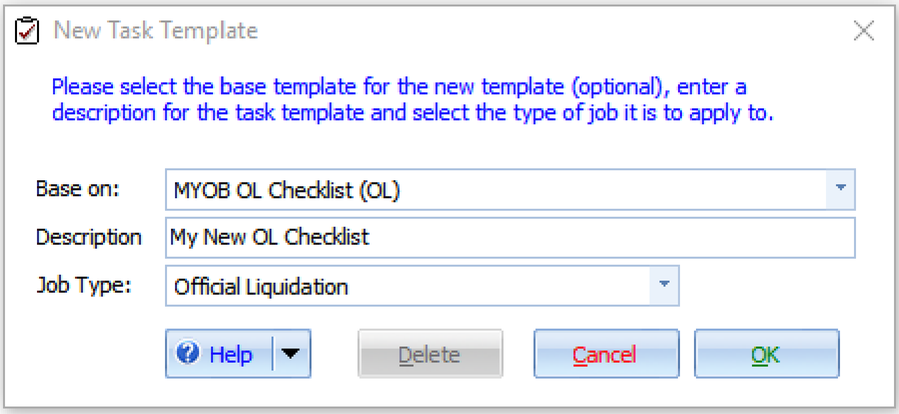


Note: You can also create a NEW TASK TEMPLATE based on an existing template.

Setting up a new Task Template based on an Existing Template

1. Select NEW TASK TEMPLATE from Menu Bar at the top of the screen.

   Set:
   BASED ON: select a template you wish to base your new template on
   DESCRIPTION: will be what you want to call your new template
   JOB TYPE: Will default to the job type of the Template you based your new template on. You can however change this.



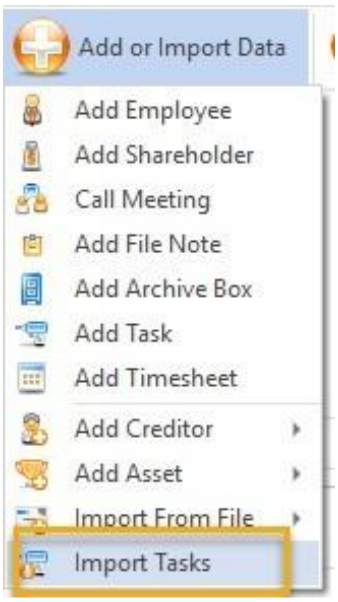
2. Click OK. A new Task Template will be created using the tasks from the existing template. You can now add, delete, or edit tasks within your new template.

Importing a Task Template

When a new Job is created, you need to create checklists for the Job to monitor that everything that is required to be completed is done. In the software checklists are called **Task Templates** meaning checklist templates. So, at the beginning of a Job, one of the first actions you will need to undertake is to import the relevant checklists or **Task Templates.**

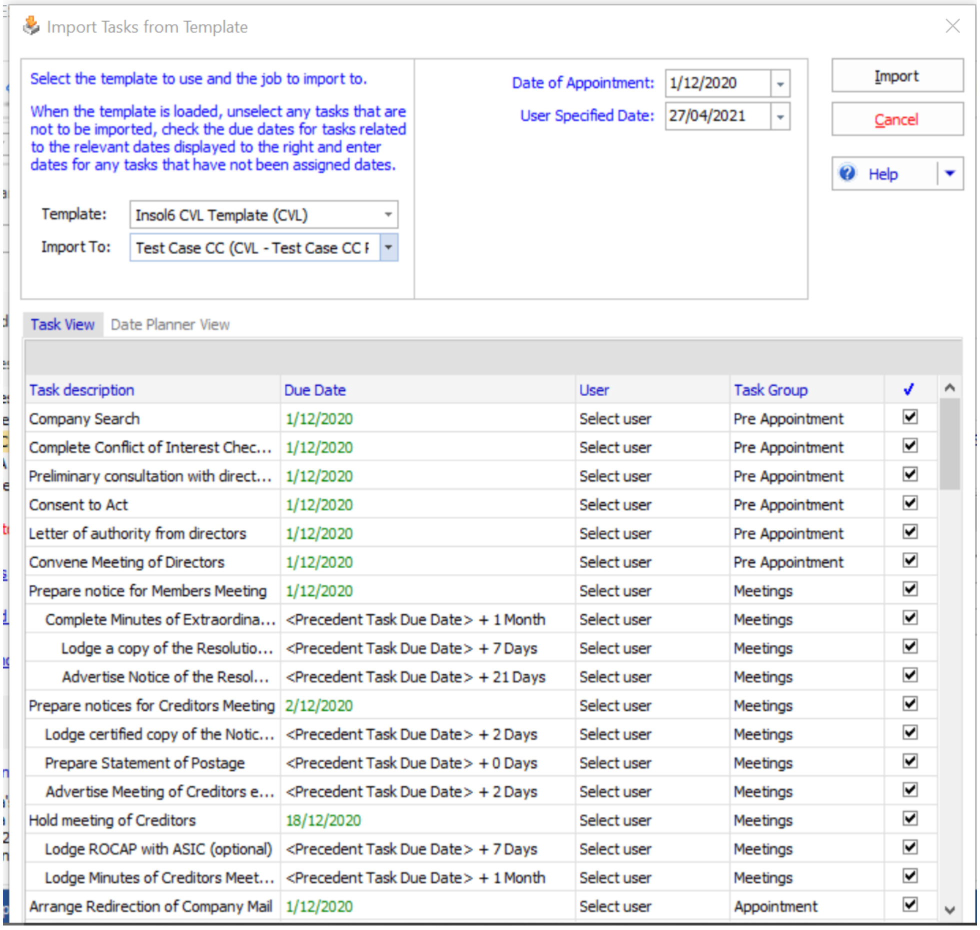
Let's go!

3. Navigate to the Job you have set up and from the standard toolbar, click **Add or Import Data** -> **Import Tasks**, as shown below:



Note: You can also import tasks from the Job's task tab

4. Select the type of Task template you need. **Note:** Task Templates can be set according to what job type it relates to


Import Tasks from Template

Select the template to use and the job to import to.

When the template is loaded, unselect any tasks that are not to be imported, check the due dates for tasks related to the relevant dates displayed to the right and enter dates for any tasks that have not been assigned dates.

Template: Insol6 CVL Template (CVL)

Import To: Test Case CC (CVL - Test Case CC I

Date of Appointment: 1/12/2020

User Specified Date: 27/04/2021

Import

Cancel

Help

Task View | Date Planner View

Task description	Due Date	User	Task Group	✓
Company Search	1/12/2020	Select user	Pre Appointment	☑
Complete Conflict of Interest Chec…	1/12/2020	Select user	Pre Appointment	☑
Preliminary consultation with direct…	1/12/2020	Select user	Pre Appointment	☑
Consent to Act	1/12/2020	Select user	Pre Appointment	☑
Letter of authority from directors	1/12/2020	Select user	Pre Appointment	☑
Convene Meeting of Directors	1/12/2020	Select user	Pre Appointment	☑
Prepare notice for Members Meeting	1/12/2020	Select user	Meetings	☑
Complete Minutes of Extraordina…	<Precedent Task Due Date> + 1 Month	Select user	Meetings	☑
Lodge a copy of the Resolutio…	<Precedent Task Due Date> + 7 Days	Select user	Meetings	☑
Advertise Notice of the Resol…	<Precedent Task Due Date> + 21 Days	Select user	Meetings	☑
Prepare notices for Creditors Meeting	2/12/2020	Select user	Meetings	☑
Lodge certified copy of the Notic…	<Precedent Task Due Date> + 2 Days	Select user	Meetings	☑
Prepare Statement of Postage	<Precedent Task Due Date> + 0 Days	Select user	Meetings	☑
Advertise Meeting of Creditors e…	<Precedent Task Due Date> + 2 Days	Select user	Meetings	☑
Hold meeting of Creditors	18/12/2020	Select user	Meetings	☑
Lodge ROCAP with ASIC (optional)	<Precedent Task Due Date> + 7 Days	Select user	Meetings	☑
Lodge Minutes of Creditors Meet…	<Precedent Task Due Date> + 1 Month	Select user	Meetings	☑
Arrange Redirection of Company Mail	1/12/2020	Select user	Appointment	☑

Note: Notice that most of the due dates for these tasks have been automatically calculated based on the appointment date. Calculations for due dates and the information contained in the Task Templates can be configured as part of the Task Template set-up. In this example, a template has already been created and configured.

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5. Click Import and Continue. You will be taken back to your Job in the Tasks tab. And from here you will now see all of the tasks that have been imported from the template. You Will also notice the tasks are marked as **Unassigned.** By right-clicking on the tasks, you can Assign tasks to user given you have enough permissions as a user. Assign all tasks on your Job to several different users.

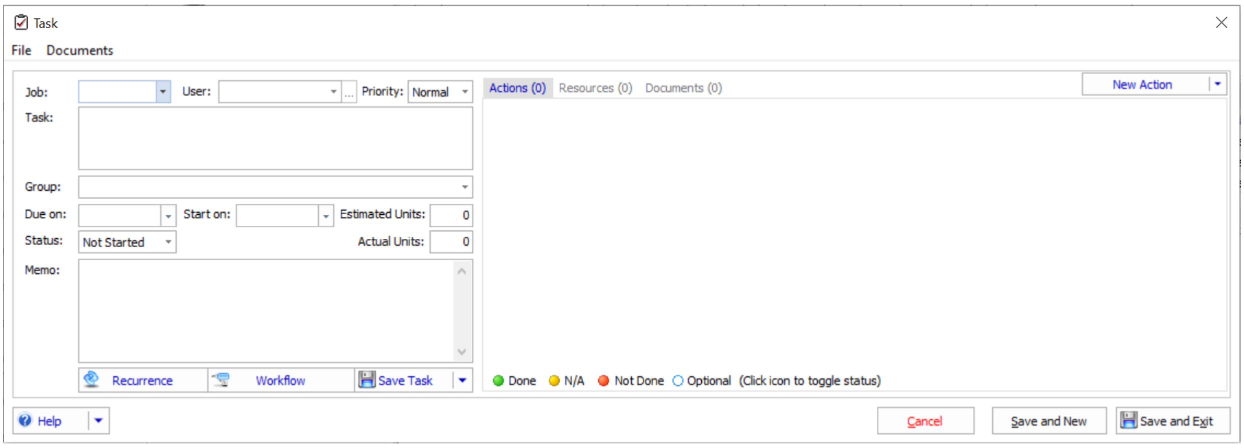
Note: You can assign more than one task at a time by highlighting several tasks, or by holding down Control and clicking on the tasks, then right-clicking to assign.

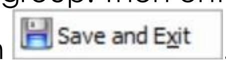
Entering individual tasks

From time to time on Jobs there are various tasks that need to be completed which may not appear on your task templates, e.g. Arrange meeting with the landlord to negotiate rental payments. For these *ad hoc* tasks, you can add new tasks to Jobs to record these. You can also create tasks for other users, E.g. A manager can create a delegate a task requesting an employee ring a creditor back that is requesting information.

1. To add an individual task, click on **Tasks** from the **Main Menu**. Select 

The task entry form appears



2. Fill out the form, select the job, user, and task group. Then enter a description of the task, fill out the due date and start date. Then 

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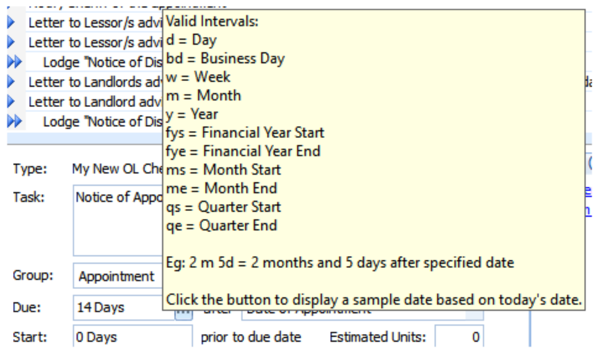
Note: You can delete tasks by right hand clicking and selecting delete (you need to have role permission to do this). You can also select multiple tasks by clicking and holding down shift or cherry picking tasks by holding down Ctrl.

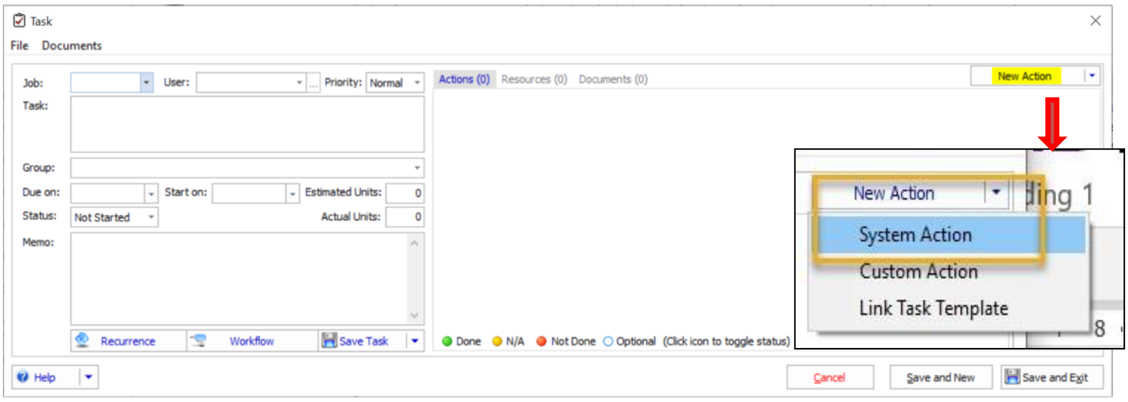
Note: Due dates can be seen by hovering in the due date cell when creating the task.



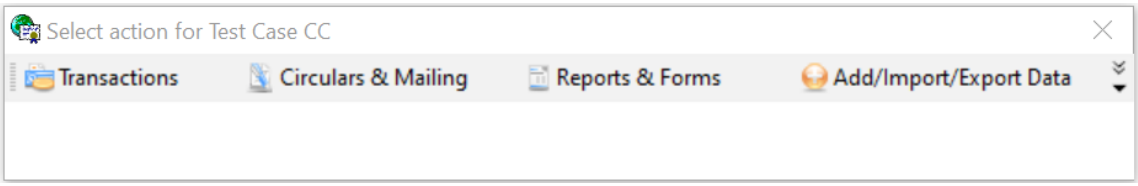
Adding a Task Action

Performing an Action is like running a menu item from the Job toolbar. This can really make it easy for a user to do the task that is required. Furthermore, it has the added benefit of being able to link the output you create from completing the task back into the task for future reference or review

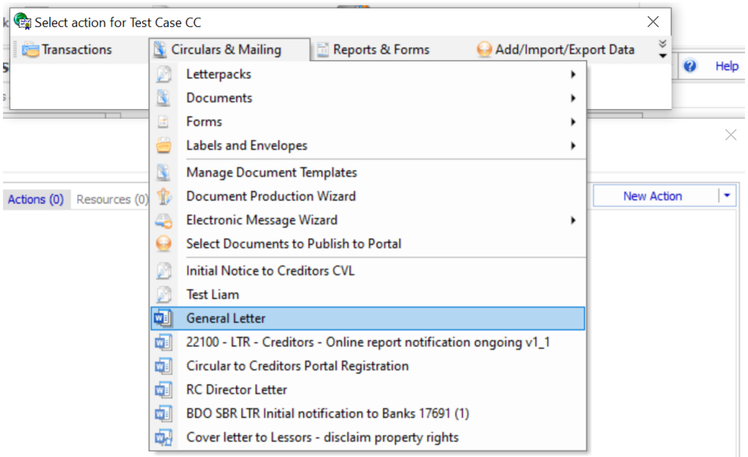
1. To add an action to a task, click on the New Action button then select System Action:



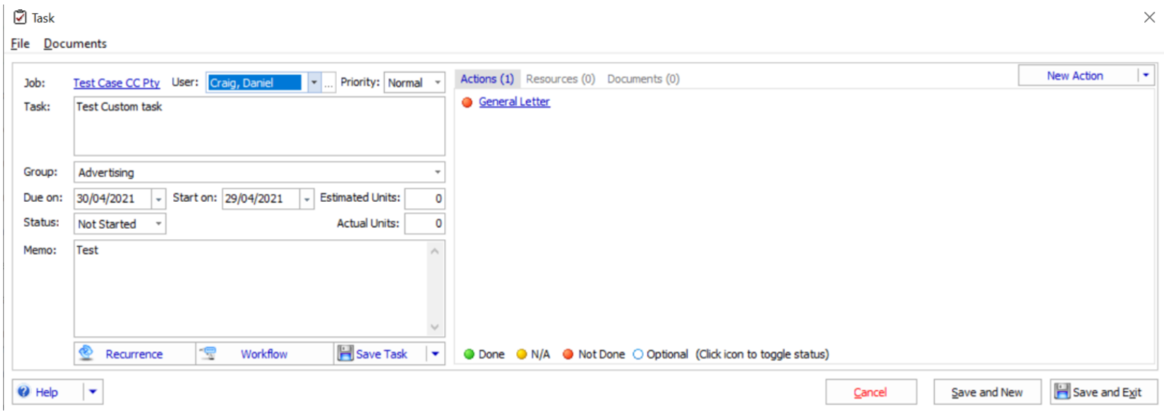
2. The job menu bar will appear:



From here, you can locate the action you need. You can select any of the relevant actions on the above options. In this example, we will choose a document.



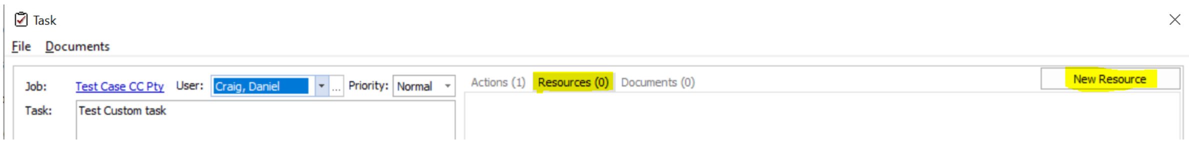
3. Once the action is selected, the action item is added to the task:



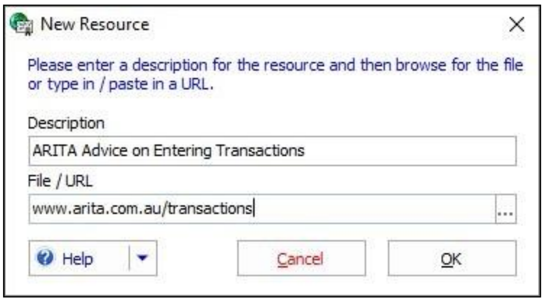
Adding a Task Resource

Resources provide links to relevant instructional/procedural information such as websites or files, including MS Word documents, PDF files and MS Excel spreadsheets.

1. After selecting the Resources tab, click on the New Resources button



2. In the New Resources window, enter the resource description and URL as shown below. Then click ok to save.



Recurring Tasks

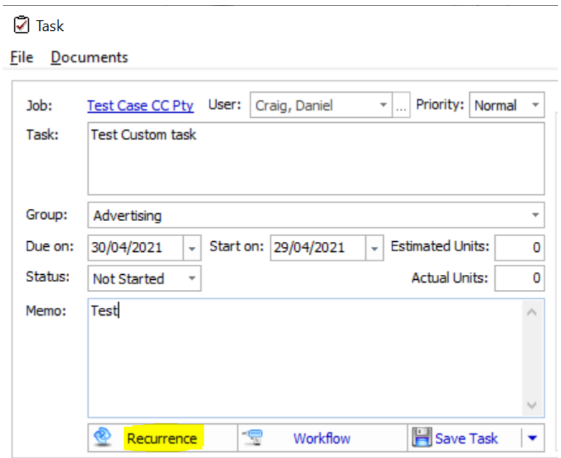
Recurring Tasks may be set up for events that continually reoccur. Examples of reoccurring tasks include BAS returns and ASIC 5602s.

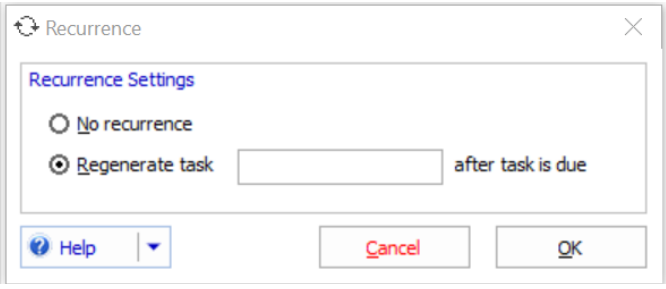
Once the Status of a recurring Task has been set to Complete, the system will prompt the User to create another Task.

The new task will be created from the Due On Date based on the next specified interval (not the date the task is marked as complete).

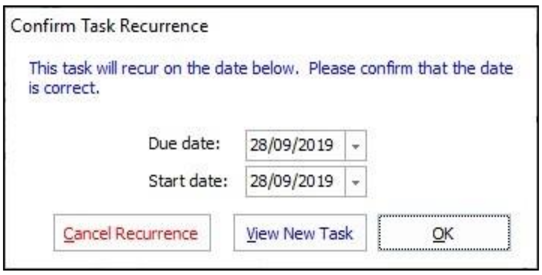
To set up recurring Tasks

Select the Recurrence button then enter required details as needed.





When the task is completed, you will see a confirm task recurrence window appear.

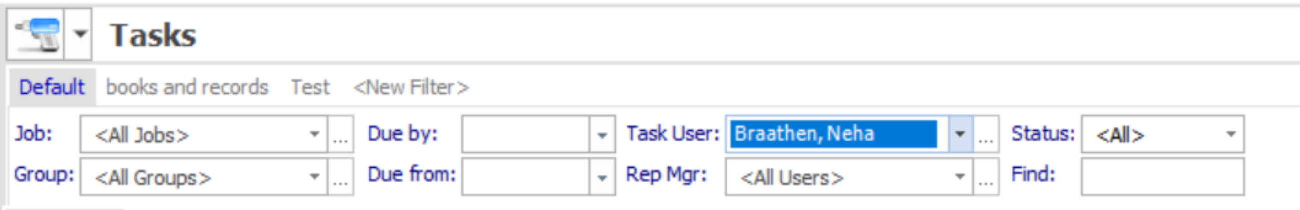


Check/Confirm the dates and click ok then save and exit. You will notice a new task is added. If you set the Status on the Task Filter Bar (see filtering tasks below) to show <All> you will see both the completed and new tasks.

Filtering and Grouping Tasks

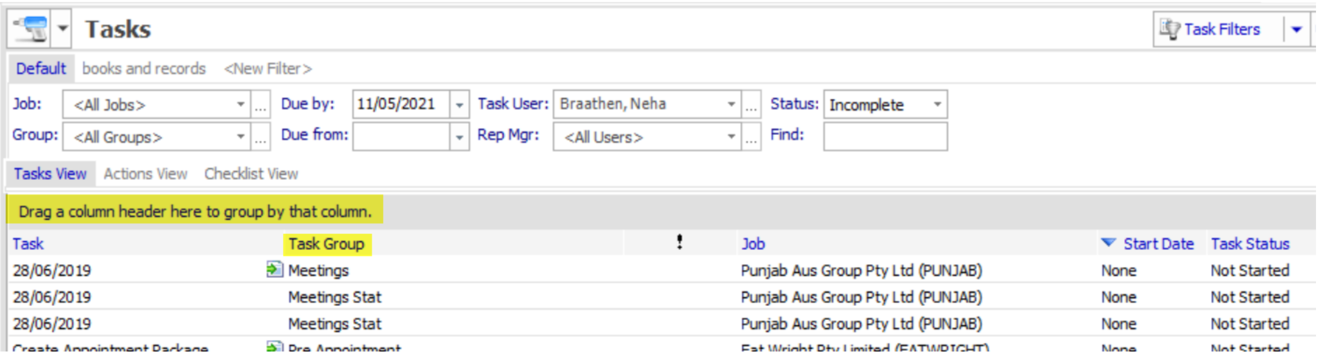
Filtering Tasks

You can apply a filter when you want to view a certain group of tasks or by user, status, or dates. On the Task screen, you can select any option below that has a drop down arrow.



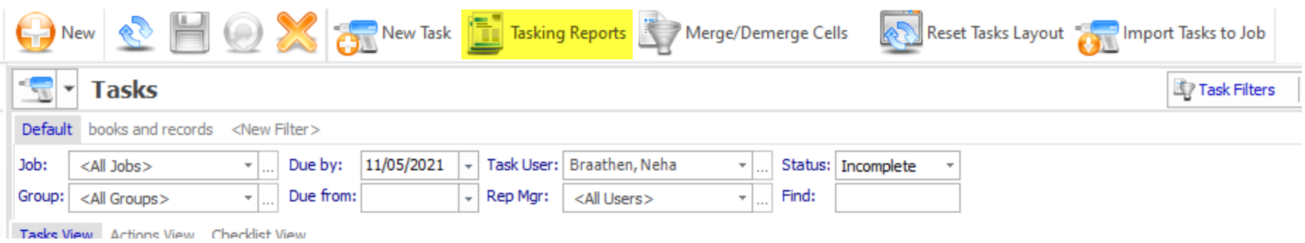
Grouping Tasks

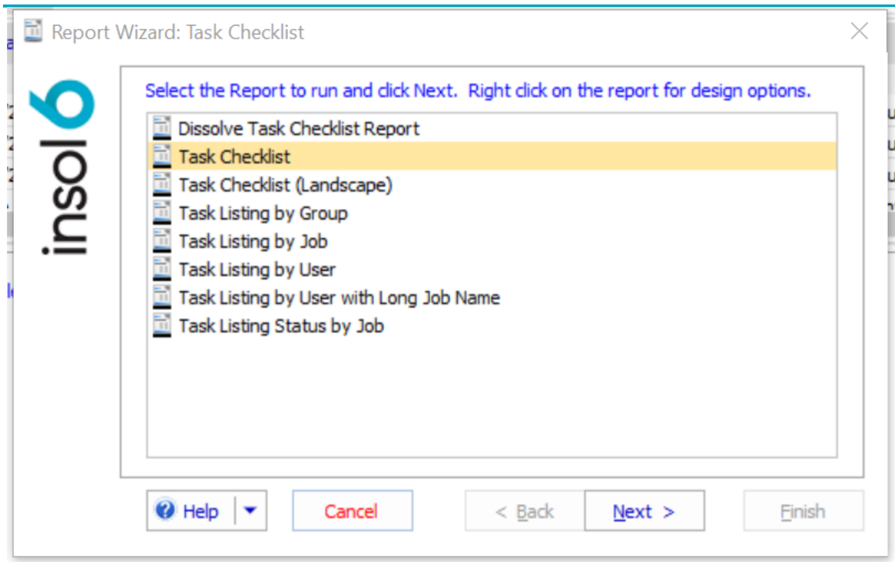
To group tasks by a particular column header, drag and drop that header to the space above, as highlighted below. The same grouping method may be applied to any other column in the Task List.



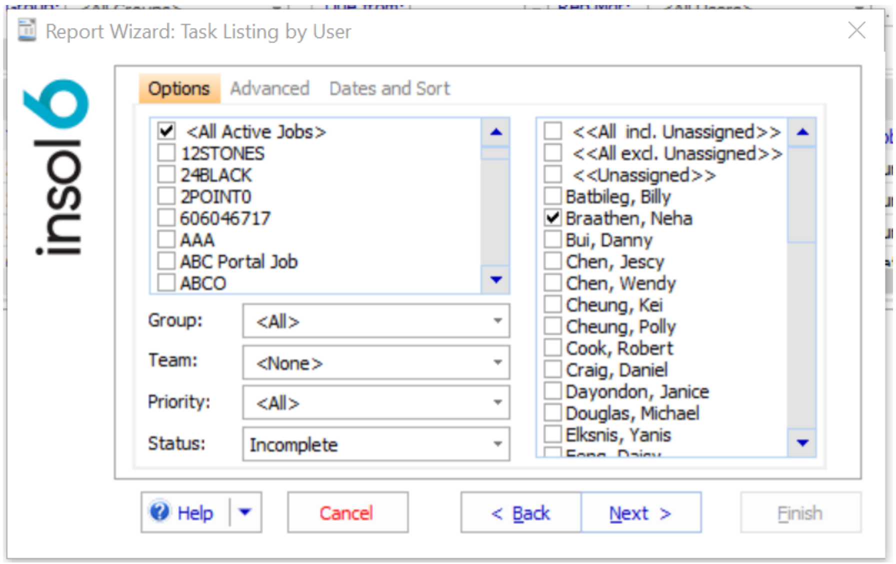
Task Reports

1. To open the Task Report Wizard, click on Tasking Reports from the toolbar. There are multiple options





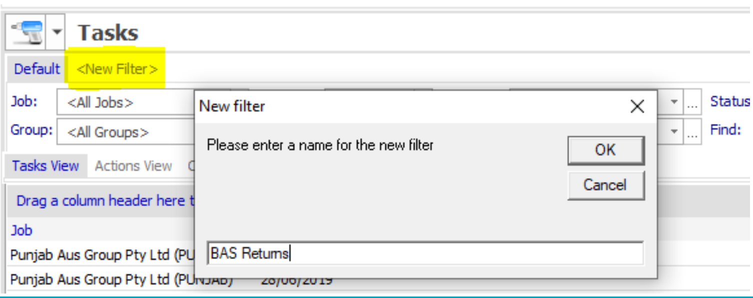
2. In the Task Report Wizard, refine your search criteria as needed and click next to complete the wizard.



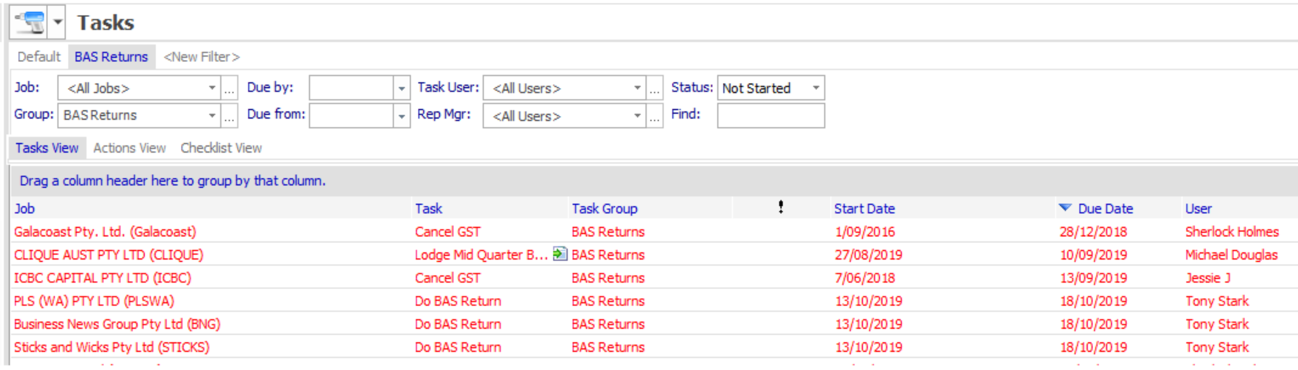
Creating a Task Filter

You can create different task filters for quick access and use.

1. In the Task register Click on <new filter> and name the filer you want to create



2. Once you have named your Filter, then set up the filter options. In the example below, it is set to all BAS returns that are not started and there is no due by date set.



3. Now each time you toggle between the default and your newly set up filter, you don't need to reset the filter parameters.