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	Kwantify - Task Management		

User Manual
for
Task Management


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User Manual For Task Management

14-Mar-2024

REVISION HISTORY

Version	Description	Author	Date
1.0	User Manual	Dikhya Mohanty	14-Mar-2024
1.0	Reviewed By	Abhijit Das	15-Mar-2024
1.0	Approved By	Ranjan Mohanty	18-Mar-2024

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1 Overview

To manage the productivity and the task management of the employees, the organization has integrated **Task Management** module in **Kwantify** Project Management Application. It enables the designated authorized users of the organization, to assign a particular task to the respective assignee which will help the organization to calculate the productivity or the time spent in that particular task.

Let's understand the process in detail in the user manual provided here.

2 Purpose

This document provides a step-by-step guideline on the basic flow of the **Task Management** module of the Kwantify application. In this document, the user will find it extremely helpful while operating the application, as the user will get the process on how to assign and get assigned the task and other details. The document will be helpful for easy understanding of the task allotment.

3 How To Get Started

To get started with the application, the user needs to enter the website URL in the browser and navigate to the Login page.

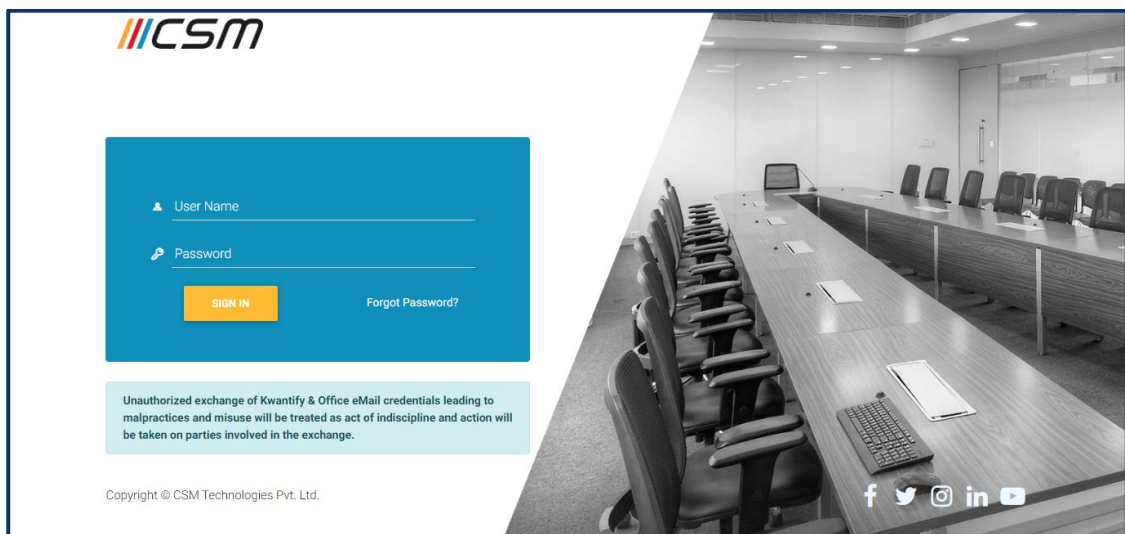



Figure 3-1 Log In Screen

Referring to **Fig. 3-1**, in the Login page-

- Enter the User Name (the respective user to enter their official user name) in the text box field.
- Enter the Password in the text box field.
- Click the **Sign In** button.

Further the page navigates to the Menu section (refer **Fig. 3-2**).

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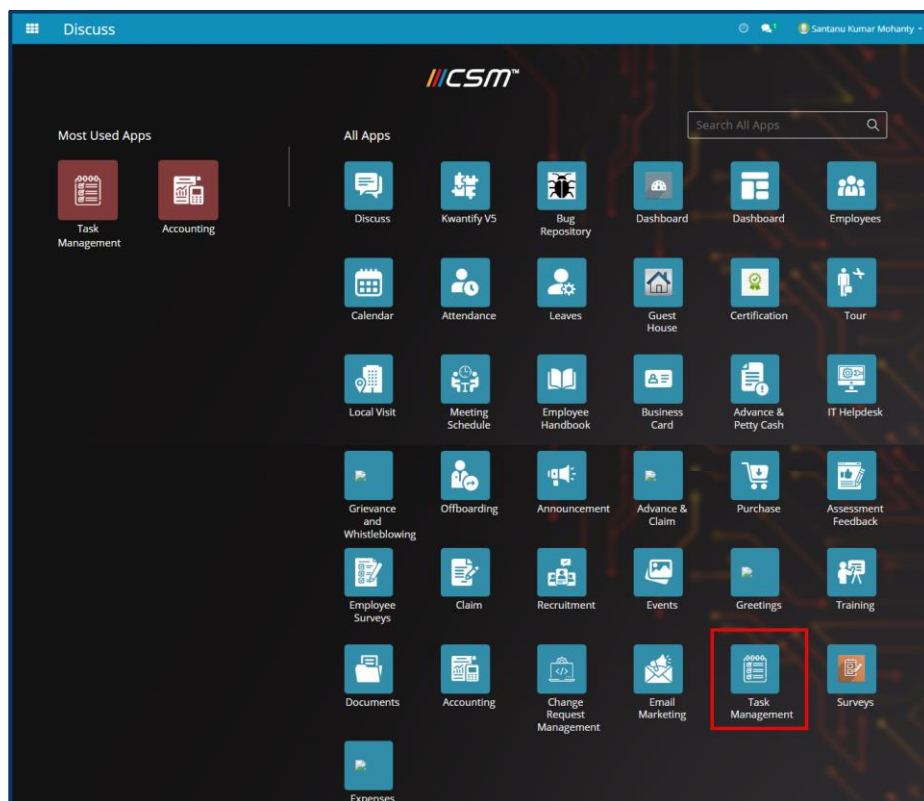


Figure 3-2 Menu Screen

Referring to **Fig. 3-2**, in the Menu page-

- Click on the **Task Management** icon amongst the various other modules.

Further the page navigates to the Task Management section.

4 Task Management


In the Task Management module, it consists of two user- **Assignee** and **Assigner**. The Assigner to assign the task to the assignee with the respective module name and the required time. The Task Management module helps to calculate the exact productivity of the employee and to extinguish the time allotted to the Assigner.

The assignee to raise a ticket of the assignment and tag the assigner.

4.1 Assigner User

Log in with the Assigner credentials (the one who will assign the assignment) in the Login page and get navigated to the Menu page.

After clicking the **Task Management** icon, the page navigates to **Fig. 4-1**.

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4.1.1 Task Management (Assign Task)

Clicking the **Task Management** tab, it expands to display two sub-tab- **Assign Task** and **Take Action**.

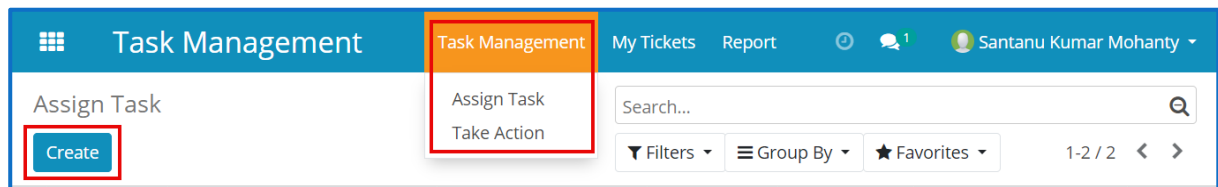


Figure 4-1 Task Management Screen

Referring to **Fig. 4-1**, in the Task Management page-

- To assign a new task, click the **Assign Task** link.
- Or the user can directly click on the **Create** button to create a new assignment.

And further the page navigates to the **Assign Task/New** page (refer **Fig. 4-2**):

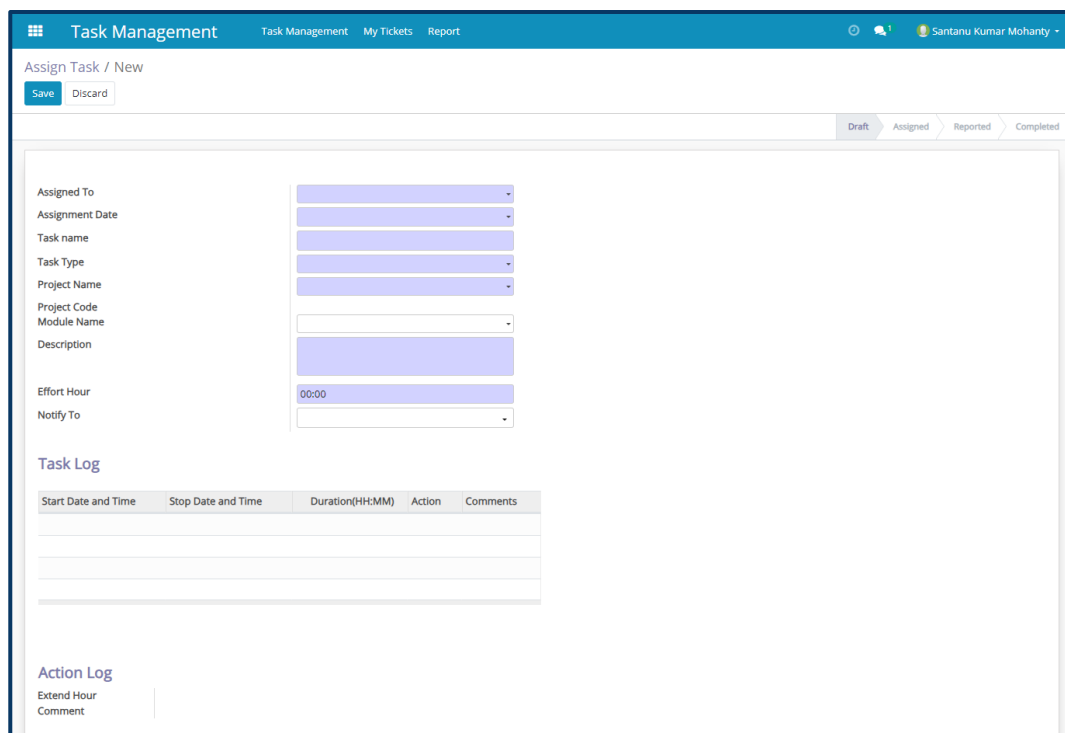



Figure 4-2 Assign Task/ New Screen (1)

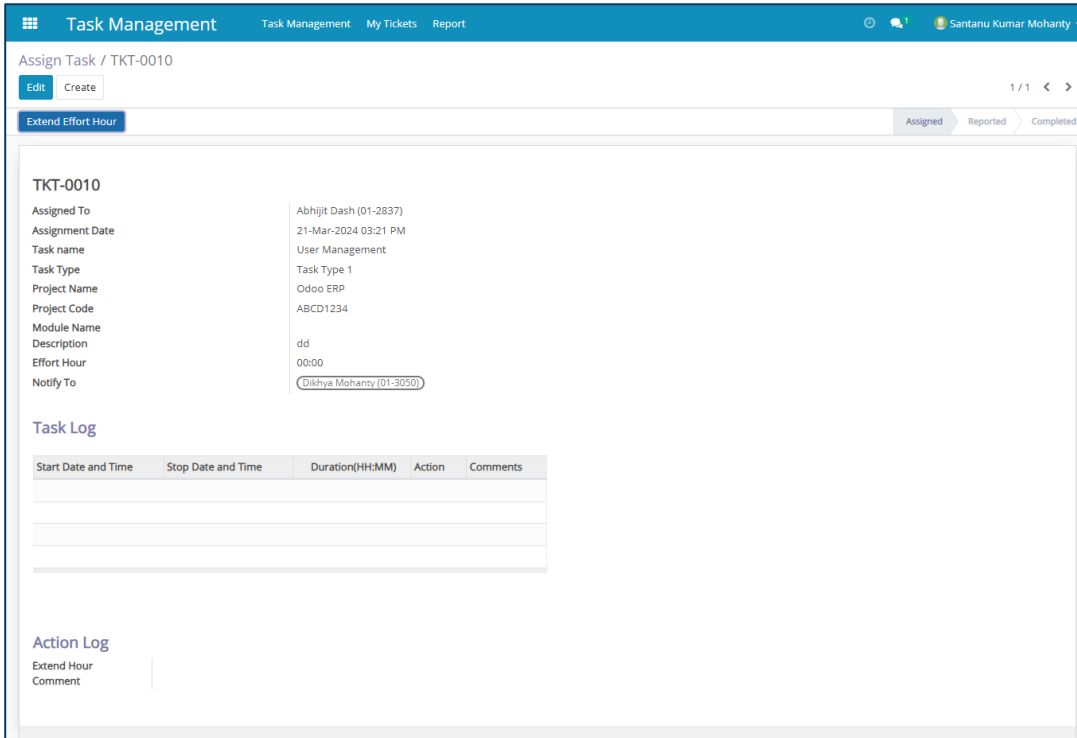
In referring to **Fig. 4-2**, in the Assign Task/New page-

- Select the Assigned To (to whom the assignment to be allotted) from the drop down menu.
- Select the Assignment Date (date of assigning the task) from the Calendar Control.
- The assignment Time is auto displayed.
- Enter the Task Name (name of the task to be assign to the assigner) in the text box field.

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- Select the Task Type from the drop down menu that is to be assigned.
- Select the Project Name (only the projects tagged to the respective user is displayed) from the drop down menu.
- The Project Code is automatically updated once the Project Name is chosen.
- Select the Module Name (name of the module of the work) from the drop down menu.
- Enter the Description of the task to be assigned in the text box field.
- Select the estimated Effort Hour from the Time Calendar.
- Select the Notify To (the user can also notify to other employee) from the drop down menu.
- Click the **Save** button.
 - To cancel the process, click the **Discard** button.

Further the assignment is saved and assigned to the respective user and the page navigates to **Fig. 4-3**.



Task Management | Task Management | My Tickets | Report | Santanu Kumar Mohanty

Assign Task / TKT-0010

[Edit](#) [Create](#) 1 / 1 < >

[Extend Effort Hour](#) [Assigned](#) [Reported](#) [Completed](#)

TKT-0010

Assigned To	Abhijit Dash (01-2837)
Assignment Date	21-Mar-2024 03:21 PM
Task name	User Management
Task Type	Task Type 1
Project Name	Odoo ERP
Project Code	ABCD1234
Module Name	dd
Description	dd
Effort Hour	00:00
Notify To	Dikhye Mohanty (01-3050)

Task Log


Start Date and Time	Stop Date and Time	Duration(HH:MM)	Action	Comments

Action Log

Action	Comment
Extend Hour	
Comment	

Figure 4-3 Assign Task/ New Screen (2)

Also, an auto generated mail is sent to the employee to whom the assignment is notified (refer **Fig. 4-4**).

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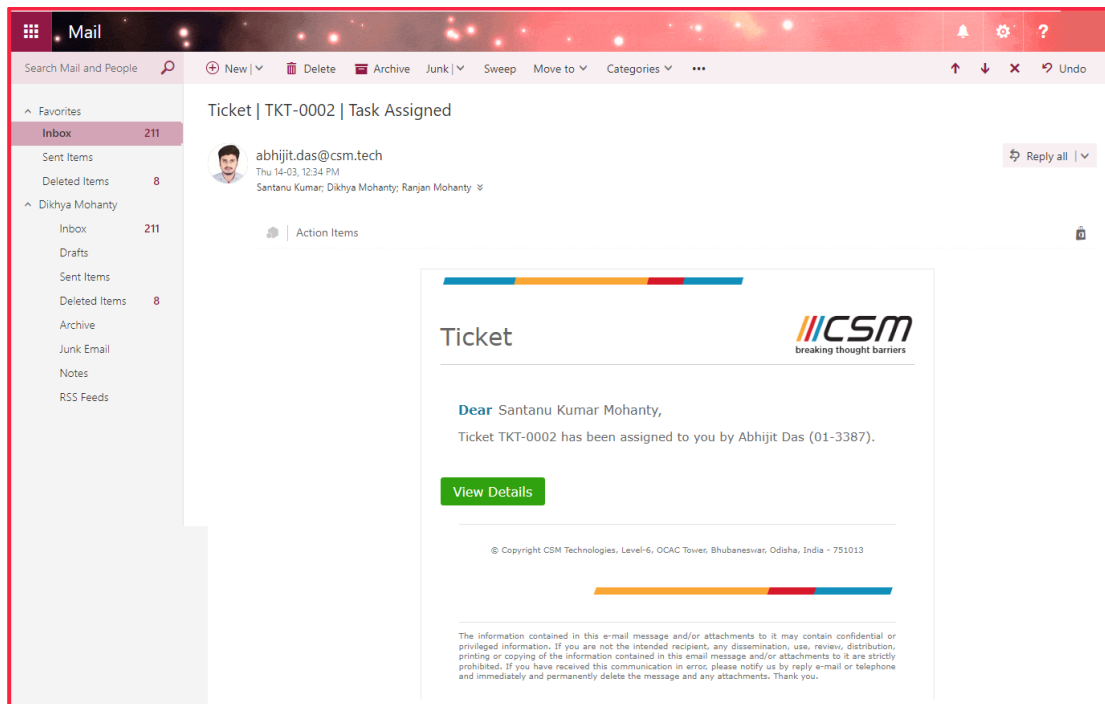


Figure 4-4 Mail Screen


In referring to **Fig. 4-4-**

- To view the details of the assignment, click the **View Details** button.

After clicking the View Details button, the page navigates to the **My Tickets** Page.

The user can also extend the assignment time.

- To edit the details, click the **Extend Effort Hour** button (refer **Fig. 4-3**) and further a pop-up populates in the screen that enables to modify the time allotted (refer **Fig. 4-4**).

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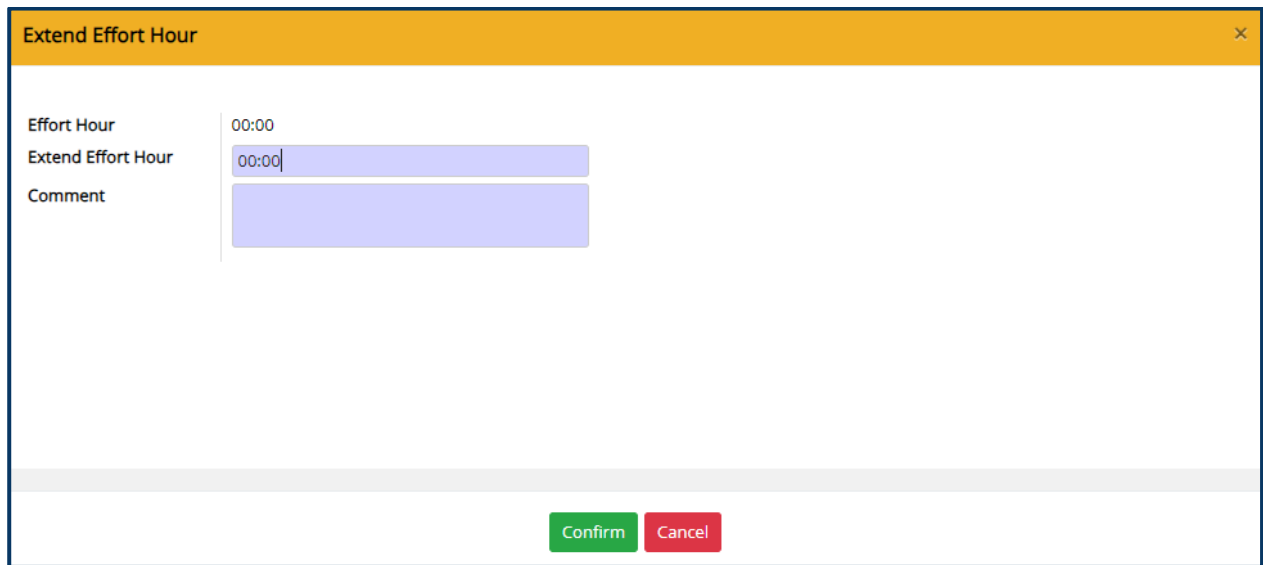


Figure 4-5 Extend Effort Hour Screen

In referring to **Fig. 4-5**, in the Extend Effort Hour pop-up-

- The Effort Hour is displayed.
- Enter the Extend Effort Hour (according to the effort hour that is to be extended) in the time calendar.
- Enter the Comment (mention the reason behind the extended time hour) in the text box field.
- Click the **Confirm** button.
 - To cancel it, click the **Cancel** button.

4.2 Assignee User

After the Assigner assigns the task to the assignee, the assignee has to login into the portal and start the assignment.

- Login with the respective credentials in the Log In page and further click the **Task Management** module icon in the Menu screen.
- Click **My Tickets** tab.

4.2.1 My Tickets

To view all the tickets received with respect to the tasks, click the **My Tickets** tab under the My Tickets section (refer **Fig. 4-6**).

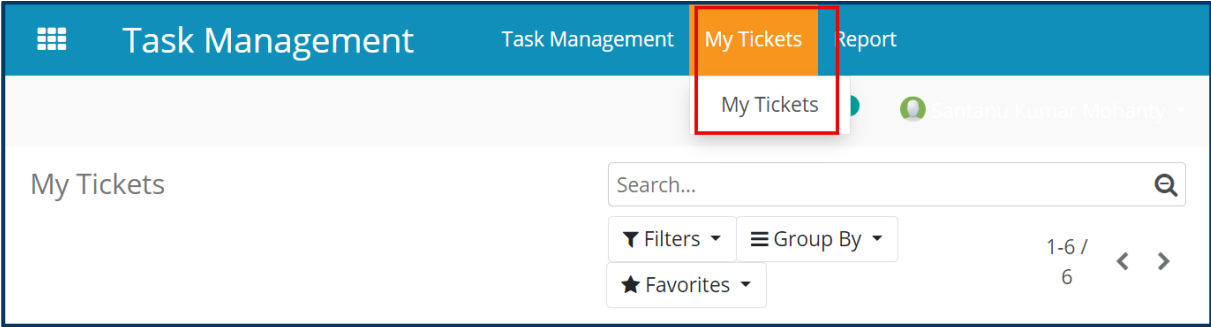
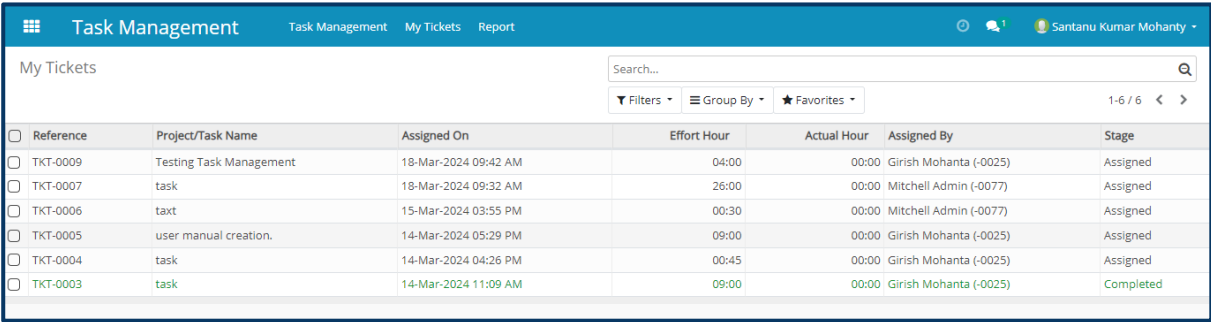


Figure 4-6 My Tickets Screen (1)

- Click the **My Tickets** option and further the page displays all the assigned tasks (refer Fig. 4-7).




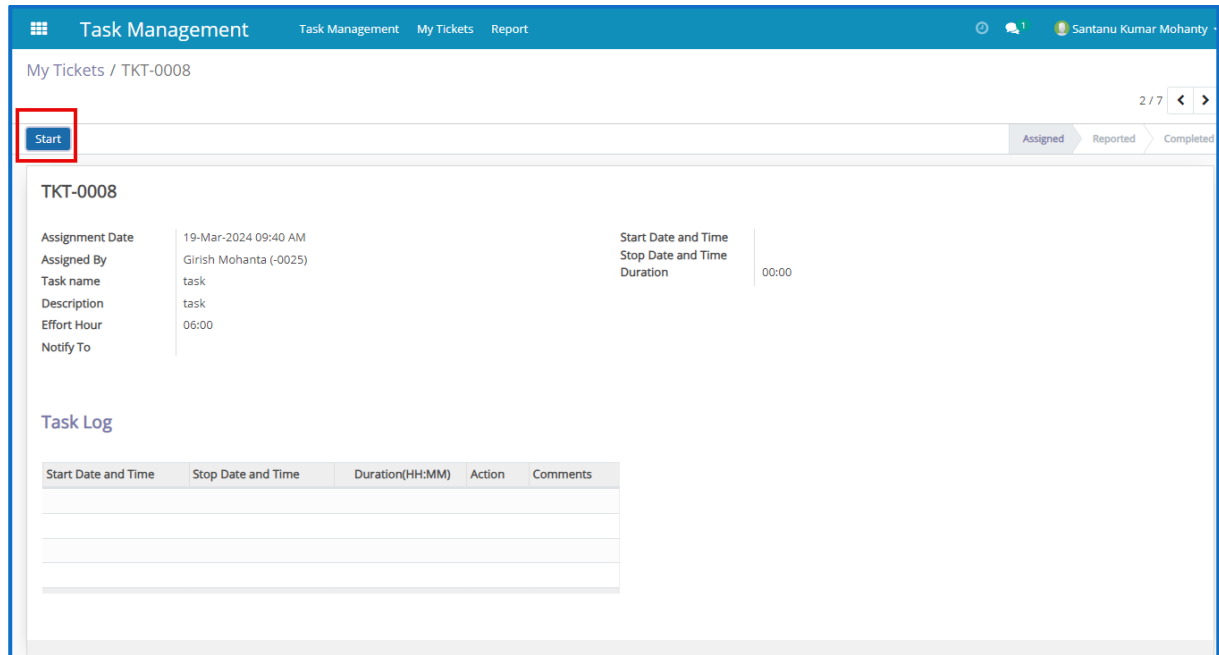
Reference	Project/Task Name	Assigned On	Effort Hour	Actual Hour	Assigned By	Stage
<input type="checkbox"/> TKT-0009	Testing Task Management	18-Mar-2024 09:42 AM	04:00	00:00	Girish Mohanta (-0025)	Assigned
<input type="checkbox"/> TKT-0007	task	18-Mar-2024 09:32 AM	26:00	00:00	Mitchell Admin (-0077)	Assigned
<input type="checkbox"/> TKT-0006	task	15-Mar-2024 03:55 PM	00:30	00:00	Mitchell Admin (-0077)	Assigned
<input type="checkbox"/> TKT-0005	user manual creation.	14-Mar-2024 05:29 PM	09:00	00:00	Girish Mohanta (-0025)	Assigned
<input type="checkbox"/> TKT-0004	task	14-Mar-2024 04:26 PM	00:45	00:00	Girish Mohanta (-0025)	Assigned
<input type="checkbox"/> TKT-0003	task	14-Mar-2024 11:09 AM	09:00	00:00	Girish Mohanta (-0025)	Completed

Figure 4-7 My Tickets Screen (2)

Referring to Fig. 4-7, the page expands to display the detailed information of all the tickets- Reference, Project/Task Name, Assigned On, Effort Hour, Actual Hour, Assigned By and Stage.

In the Search Panel, the user can also filter the search by using Filter, Group By and Favorites.

- To download the data in Excel sheet, select the task by clicking the respective checkbox and click the icon ().
- Further click against the Project/Task name and the page navigates to Fig. 4-8:



Task Management | Task Management | My Tickets | Report

My Tickets / TKT-0008

2 / 7

Assigned | Reported | Completed

TKT-0008

Assignment Date	19-Mar-2024 09:40 AM	Start Date and Time	
Assigned By	Girish Mohanta (-0025)	Stop Date and Time	
Task name	task	Duration	00:00
Description	task		
Effort Hour	06:00		
Notify To			

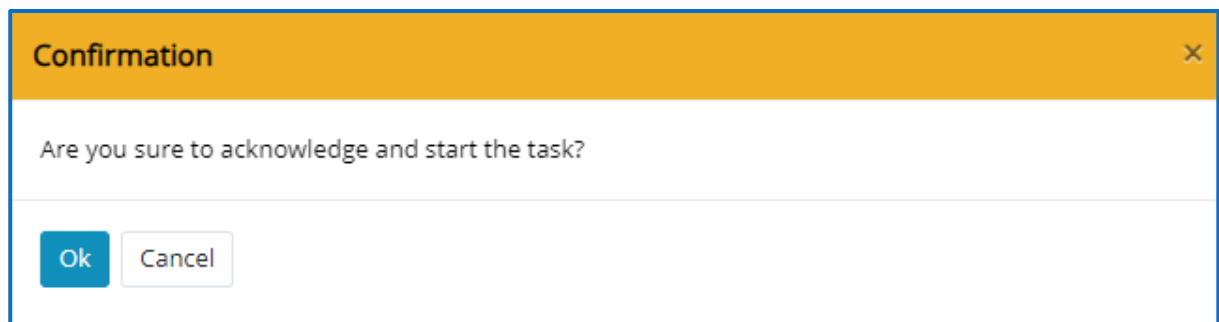
Task Log

Start Date and Time	Stop Date and Time	Duration(HH:MM)	Action	Comments

Figure 4-8 My Tickets Screen (3)

In referring to **Fig. 4-8**, the page displays the detailed information about the assignment and the Task Log.

- To start the assignment, click the **Start** tab as highlighted in the figure and further a confirmation pop-up populates in the screen (refer **Fig. 4-9**).



Confirmation

Are you sure to acknowledge and start the task?

Ok Cancel

Figure 4-9 Confirmation Screen

In referring to **4-9**, it displays for the confirmation- "Are you sure to acknowledge and start the task?"

- To confirm, click the **OK** button. Or to cancel the process, click the **Cancel** button.

Further the page navigates to **Fig. 4-10**.

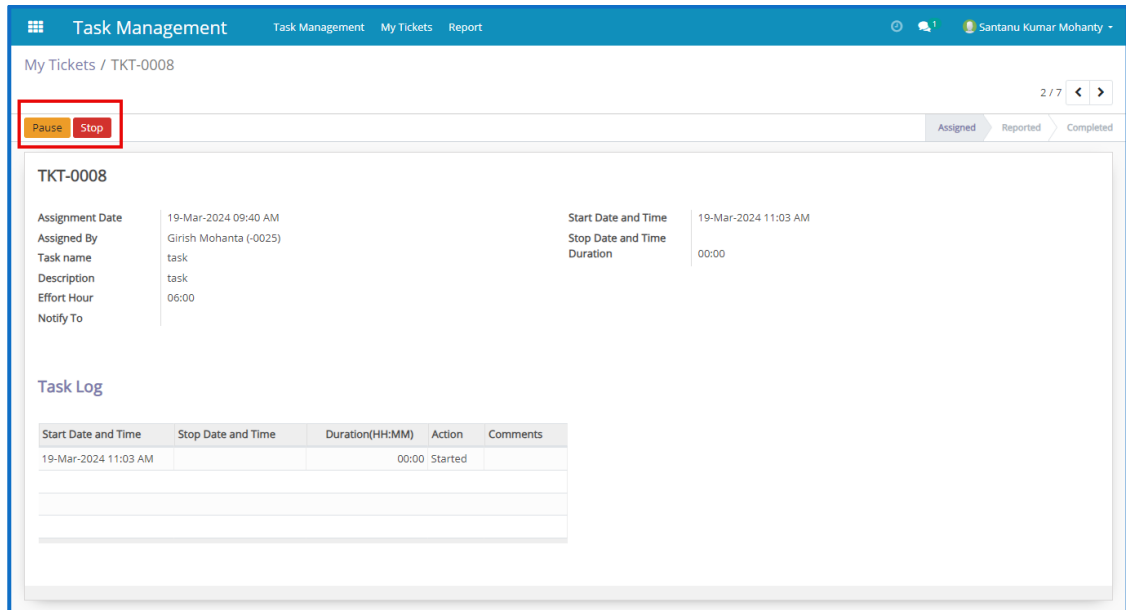


Figure 4-10 My Tickets Screen (3)

- To pause the task, click the **Pause** button and further a pop-up populates in the screen (refer **Fig. 4-11**).

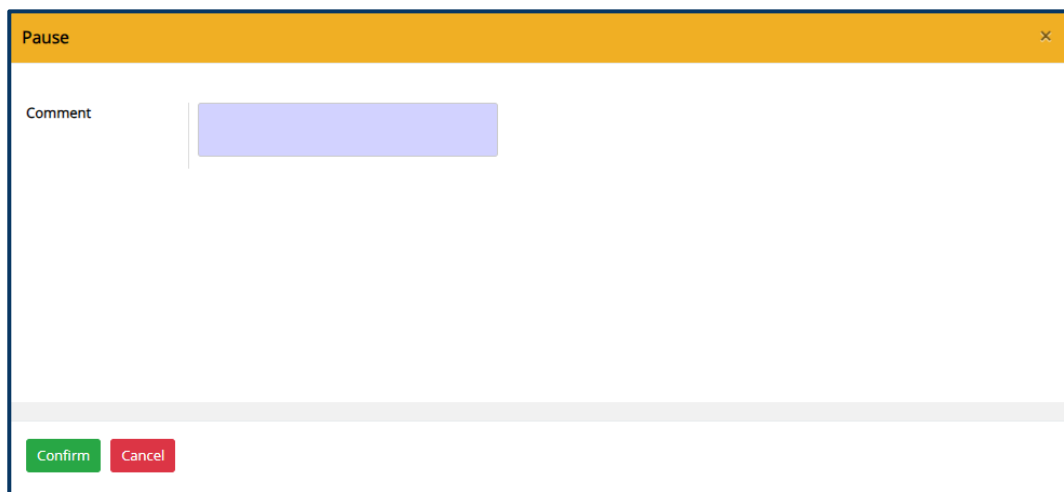
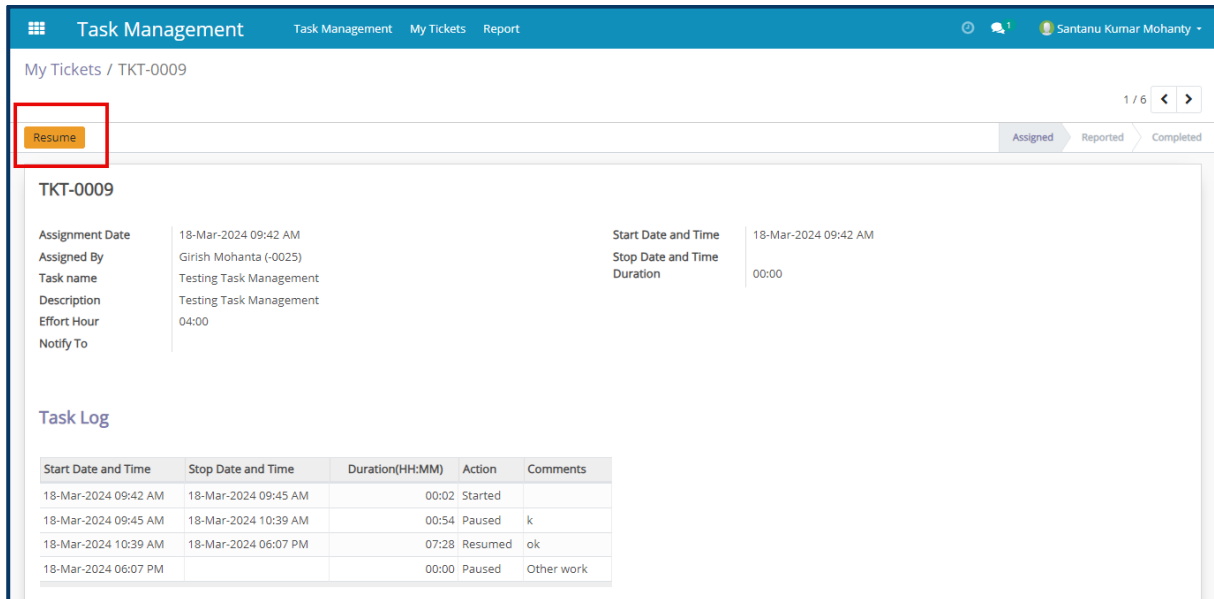


Figure 4-11 Pause Pop-up

In referring to **4-11-**

- Enter the Comment (the reason why the task is paused) in the text box field.
- Click the **Confirm** button.
 - Or to cancel, click the **Cancel** button.

Further the screen navigates to **Fig. 4-12**.



Task Management | Task Management | My Tickets | Report

My Tickets / TKT-0009

Resume | Assigned | Reported | Completed

TKT-0009

Assignment Date: 18-Mar-2024 09:42 AM | Start Date and Time: 18-Mar-2024 09:42 AM

Assigned By: Girish Mohanta (-0025) | Stop Date and Time: 00:00

Task name: Testing Task Management | Duration: 00:00

Description: Testing Task Management

Effort Hour: 04:00

Notify To:

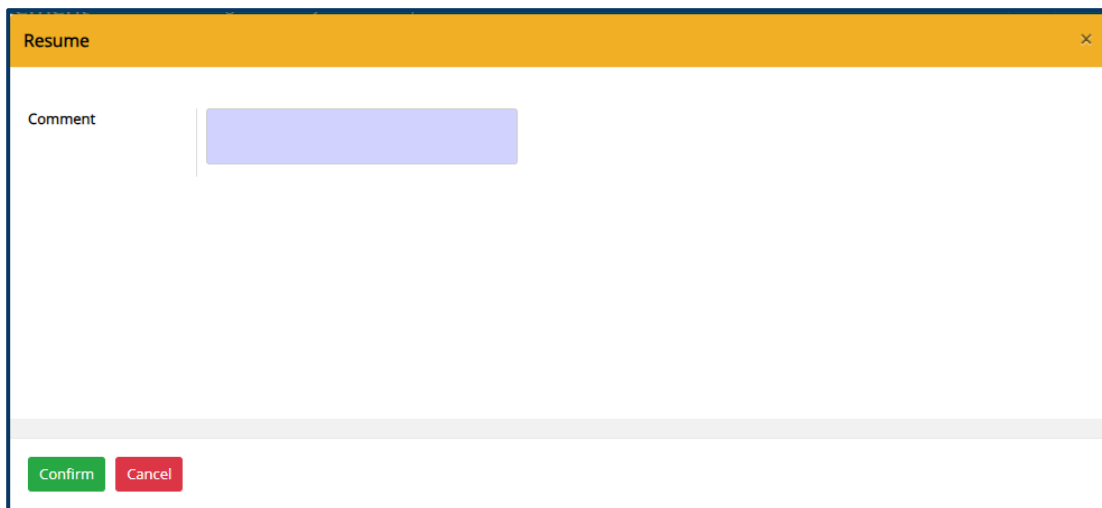
Task Log

Start Date and Time	Stop Date and Time	Duration(HH:MM)	Action	Comments
18-Mar-2024 09:42 AM	18-Mar-2024 09:45 AM	00:02	Started	
18-Mar-2024 09:45 AM	18-Mar-2024 10:39 AM	00:54	Paused	k
18-Mar-2024 10:39 AM	18-Mar-2024 06:07 PM	07:28	Resumed	ok
18-Mar-2024 06:07 PM		00:00	Paused	Other work

Figure 4-12 My Tickets Screen (4)

In reference to **Fig. 4-12-**

- To resume the task, click the **Resume** button and further a pop-up populates in the screen (refer **Fig. 4-13**).



Resume


Comment

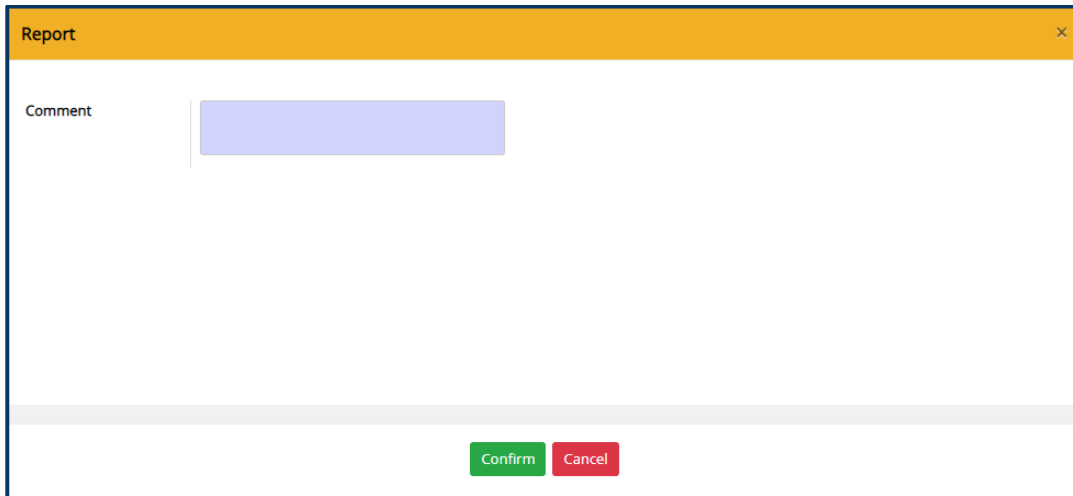
Confirm **Cancel**

Figure 4-13 Resume Pop-up

In referring to **Fig. 4-13-**

- Enter the Comment (the reason why the task is resumed) in the text box field.
- Click the **Confirm** button.
 - Or to cancel, click the **Cancel** button.
- To stop the task, click the **Stop** button (refer **Fig. 4-10**) and further a pop-up populates in the screen (refer **Fig. 4-14**).

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A screenshot of a 'Report' pop-up window. It has an orange header bar with the title 'Report' and a close button. Below the header is a 'Comment' label followed by a large, empty text input field. At the bottom of the window, there are two buttons: a green 'Confirm' button and a red 'Cancel' button.

Figure 4-14 Report Pop-up

In referring to 4-14-

- Enter the Comment (the reason why the task is stopped) in the text box field.
- Click the **Confirm** button.
 - Or to cancel, click the **Cancel** button.

4.2.2 Reports

In the Reports section, it displays the detailed report of all the task management details and the productivity details.

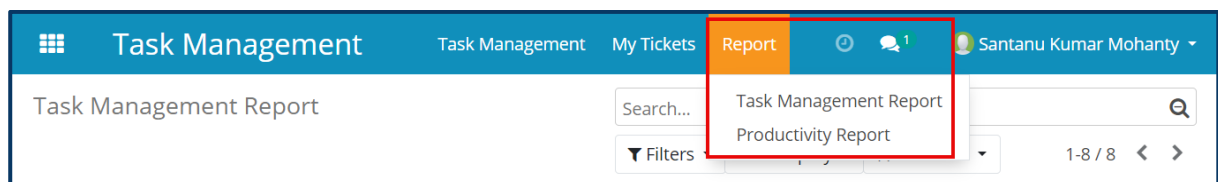



Figure 4-15 Reports Screen

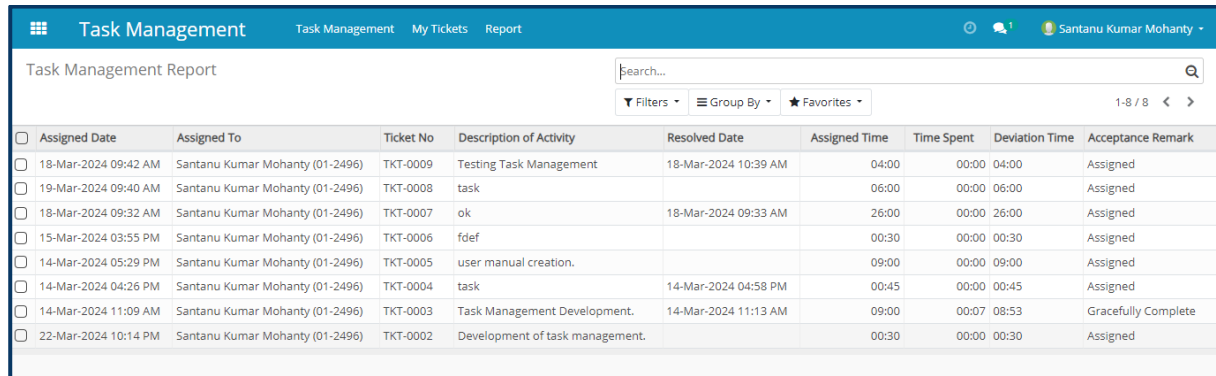
After clicking the Report tab, it further displays the sub-tab-

- Task Management Report
- Productivity Report

4.2.2.1 Task Management Report

To view the reports of the Task Management, click the **Task Management Report** tab and get navigated to **Fig. 4-16**.

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
Assigned Date	Assigned To	Ticket No	Description of Activity	Resolved Date	Assigned Time	Time Spent	Deviation Time	Acceptance Remark
18-Mar-2024 09:42 AM	Santanu Kumar Mohanty (01-2496)	TKT-0009	Testing Task Management	18-Mar-2024 10:39 AM	04:00	00:00	04:00	Assigned
19-Mar-2024 09:40 AM	Santanu Kumar Mohanty (01-2496)	TKT-0008	task		06:00	00:00	06:00	Assigned
18-Mar-2024 09:32 AM	Santanu Kumar Mohanty (01-2496)	TKT-0007	ok	18-Mar-2024 09:33 AM	26:00	00:00	26:00	Assigned
15-Mar-2024 03:55 PM	Santanu Kumar Mohanty (01-2496)	TKT-0006	fdef		00:30	00:00	00:30	Assigned
14-Mar-2024 05:29 PM	Santanu Kumar Mohanty (01-2496)	TKT-0005	user manual creation.		09:00	00:00	09:00	Assigned
14-Mar-2024 04:26 PM	Santanu Kumar Mohanty (01-2496)	TKT-0004	task	14-Mar-2024 04:58 PM	00:45	00:00	00:45	Assigned
14-Mar-2024 11:09 AM	Santanu Kumar Mohanty (01-2496)	TKT-0003	Task Management Development.	14-Mar-2024 11:13 AM	09:00	00:07	08:53	Gracefully Complete
22-Mar-2024 10:14 PM	Santanu Kumar Mohanty (01-2496)	TKT-0002	Development of task management.		00:30	00:00	00:30	Assigned

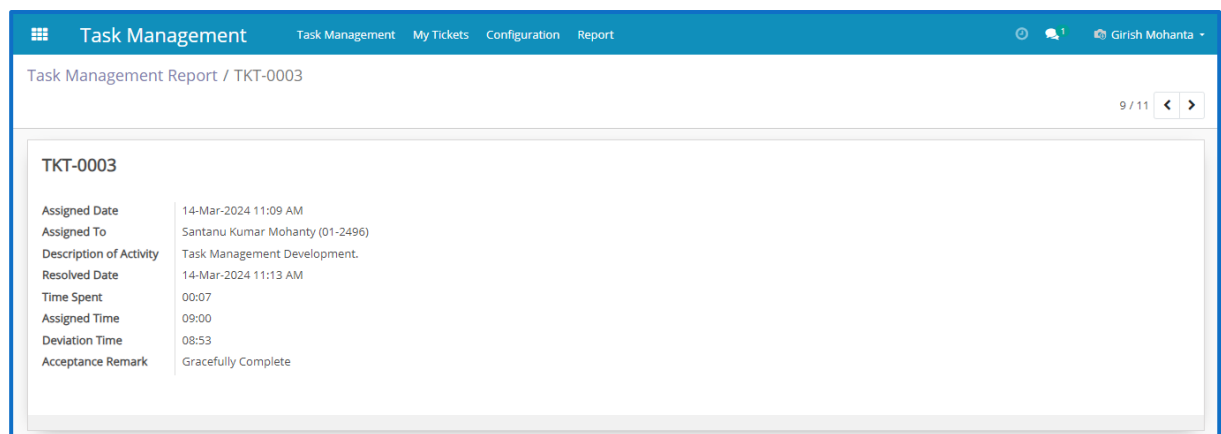
Figure 4-16 Task Management Report Screen (1)

In referring to **Fig. 4-16**, in the Task Management Report, it displays the detailed report- Assigned Date, Assigned To, Ticket No, Description of Activity, Resolved Date, Assigned Time, Time Spent, Deviation Time and Acceptance Report.

- In the Acceptance Report, it displays the status of the assignment-
 - If the assignment is assigned, it displays as “**Assigned**”.
 - If the assignment is completed, it displays as “**Gracefully Complete**”.

In the Search Panel, the user can also filter the search by using Filter, Group By and Favorites.

- To download the data in Excel sheet, select the task by clicking the respective checkbox and click the icon ().
- To view the detailed information of the assignment, click on the respective Assignment in the check box and get navigated to **Fig. 4-17**.




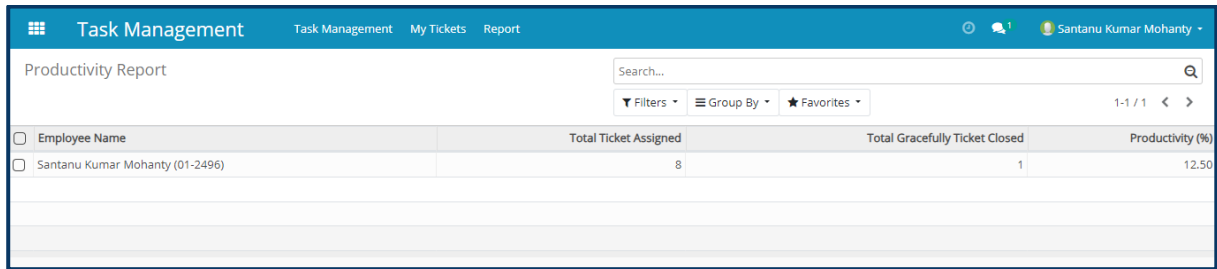
TKT-0003	
Assigned Date	14-Mar-2024 11:09 AM
Assigned To	Santanu Kumar Mohanty (01-2496)
Description of Activity	Task Management Development.
Resolved Date	14-Mar-2024 11:13 AM
Time Spent	00:07
Assigned Time	09:00
Deviation Time	08:53
Acceptance Remark	Gracefully Complete

Figure 4-17 Task Management Report Screen (2)

4.2.2.2 Productivity Report

To view the reports of the productivity, click the **Productivity Report** tab and get navigated to **Fig. 4-18**.

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Employee Name	Total Ticket Assigned	Total Gracefully Ticket Closed	Productivity (%)
Santanu Kumar Mohanty (01-2496)	8	1	12.50

Figure 4-18 Productivity Report Screen

In referring to **4-18**, in the Productivity Report, it displays the detailed report- Employee Name, Total Ticket Assigned, Total Gracefully Ticket Closed and Productivity (%).

In the Search Panel, the user can also filter the search by using Filter, Group By and Favorites options.

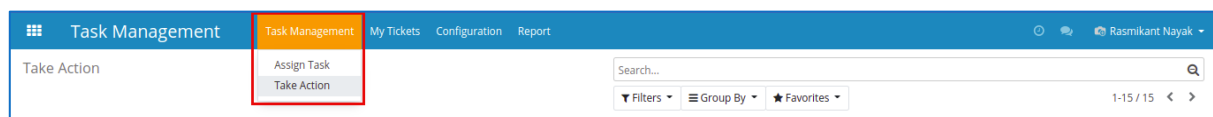
- To download the data in Excel sheet, select the task by clicking the respective checkbox followed by clicking the  icon.

4.3 Assigner User

After the Assignee completes the task, the Assigner to acknowledge the completed assignment with remark. Log in with the Assigner credentials in the Log in page and click the Task Management module and get navigated to the Task Management page.

4.3.1 Take Action

Click the Task Management button (refer **Fig. 4-19**).

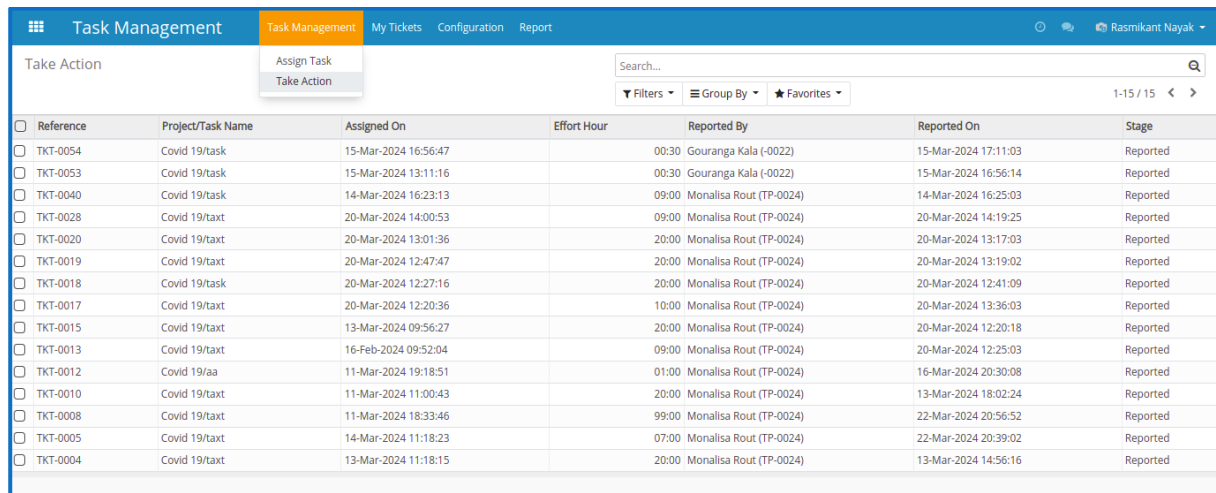


Task Management	My Tickets	Configuration	Report
Assign Task Take Action			

Figure 4-19 Take Action Screen (1)

In referring to **4-19**-

- Click the **Take Action** button and further the page expands to display the detailed information (refer **Fig. 4-20**).

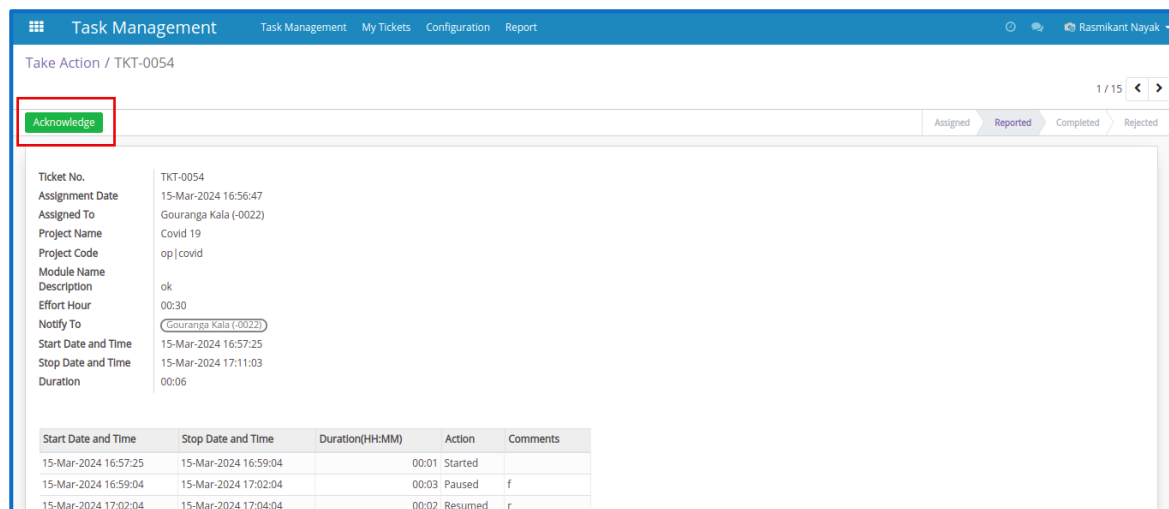


Reference	Project/Task Name	Assigned On	Effort Hour	Reported By	Reported On	Stage
TKT-0054	Covid 19/task	15-Mar-2024 16:56:47	00:30	Gouranga Kala (-0022)	15-Mar-2024 17:11:03	Reported
TKT-0053	Covid 19/task	15-Mar-2024 13:11:16	00:30	Gouranga Kala (-0022)	15-Mar-2024 16:56:14	Reported
TKT-0040	Covid 19/task	14-Mar-2024 16:23:13	09:00	Monalisa Rout (TP-0024)	14-Mar-2024 16:25:03	Reported
TKT-0028	Covid 19/task	20-Mar-2024 14:00:53	09:00	Monalisa Rout (TP-0024)	20-Mar-2024 14:19:25	Reported
TKT-0020	Covid 19/task	20-Mar-2024 13:01:36	20:00	Monalisa Rout (TP-0024)	20-Mar-2024 13:17:03	Reported
TKT-0019	Covid 19/task	20-Mar-2024 12:47:47	20:00	Monalisa Rout (TP-0024)	20-Mar-2024 13:19:02	Reported
TKT-0018	Covid 19/task	20-Mar-2024 12:27:16	20:00	Monalisa Rout (TP-0024)	20-Mar-2024 12:41:09	Reported
TKT-0017	Covid 19/task	20-Mar-2024 12:20:36	10:00	Monalisa Rout (TP-0024)	20-Mar-2024 13:36:03	Reported
TKT-0015	Covid 19/task	13-Mar-2024 09:56:27	20:00	Monalisa Rout (TP-0024)	20-Mar-2024 12:20:18	Reported
TKT-0013	Covid 19/task	16-Feb-2024 09:52:04	09:00	Monalisa Rout (TP-0024)	20-Mar-2024 12:25:03	Reported
TKT-0012	Covid 19/aa	11-Mar-2024 19:18:51	01:00	Monalisa Rout (TP-0024)	16-Mar-2024 20:30:08	Reported
TKT-0010	Covid 19/task	11-Mar-2024 11:00:43	20:00	Monalisa Rout (TP-0024)	13-Mar-2024 18:02:24	Reported
TKT-0008	Covid 19/task	11-Mar-2024 18:33:46	99:00	Monalisa Rout (TP-0024)	22-Mar-2024 20:56:52	Reported
TKT-0005	Covid 19/task	14-Mar-2024 11:18:23	07:00	Monalisa Rout (TP-0024)	22-Mar-2024 20:39:02	Reported
TKT-0004	Covid 19/task	13-Mar-2024 11:18:15	20:00	Monalisa Rout (TP-0024)	13-Mar-2024 14:56:16	Reported

Figure 4-20 Take Action Screen (2)

In referring to 4-20, in the Take Action page, it displays the detailed data- Reference, Project/Task Name, Assigned On, Effort Hour, Reported By, Reported On and Stage.

- To acknowledge, click on the respective Project/Task name and get navigated to **Fig. 4-21**.




Ticket No.	TKT-0054
Assignment Date	15-Mar-2024 16:56:47
Assigned To	Gouranga Kala (-0022)
Project Name	Covid 19
Project Code	op covid
Module Name	ok
Description	00:30
Effort Hour	00:30
Notify To	Gouranga Kala (-0022)
Start Date and Time	15-Mar-2024 16:57:25
Stop Date and Time	15-Mar-2024 17:11:03
Duration	00:06

Start Date and Time	Stop Date and Time	Duration(HH:MM)	Action	Comments
15-Mar-2024 16:57:25	15-Mar-2024 16:59:04	00:01	Started	
15-Mar-2024 16:59:04	15-Mar-2024 17:02:04	00:03	Paused	f
15-Mar-2024 17:02:04	15-Mar-2024 17:04:04	00:02	Resumed	r

Figure 4-21 Take Action Screen

In referring to 4-21, in the Take Action page, it displays the complete details of the assignment.

To acknowledge the assignment, click the **Acknowledge** button as highlighted in the figure and further a pop-up populates the screen (refer **Fig. 4-22**).

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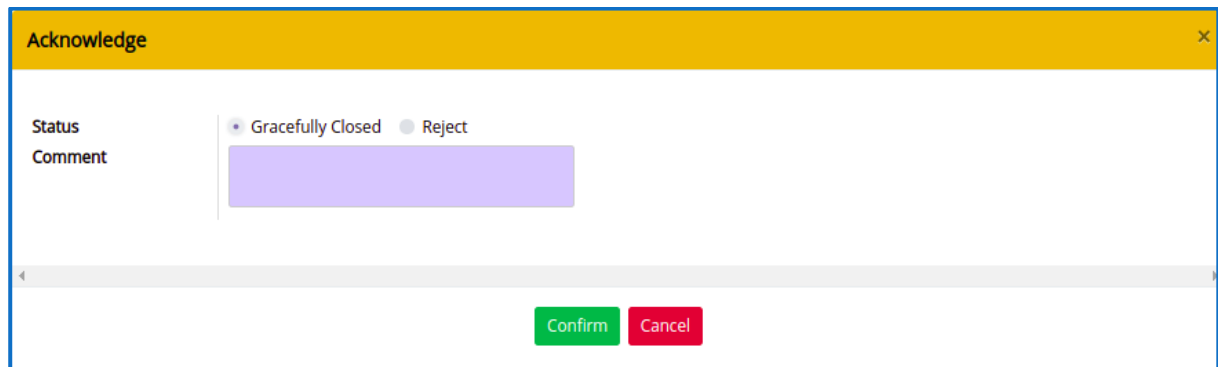


Figure 4-22 Acknowledge Screen (1)

In referring to **4-22**, in the Acknowledge pop-up-

- In the Status Comment, select Gracefully Close (if the Assigner is satisfied with the assignment) against the radio button.

Note: If the Assigner selects “Gracefully Close”, the ticket will be count as productive.

- In the Status Comment, select Reject (if the Assigner is not satisfied with the assignment) against the radio button and the ticket is rejected and the process will end.

Note: If the Assigner selects “Reject”, further a new option is displayed (refer **Fig. 4-23**).

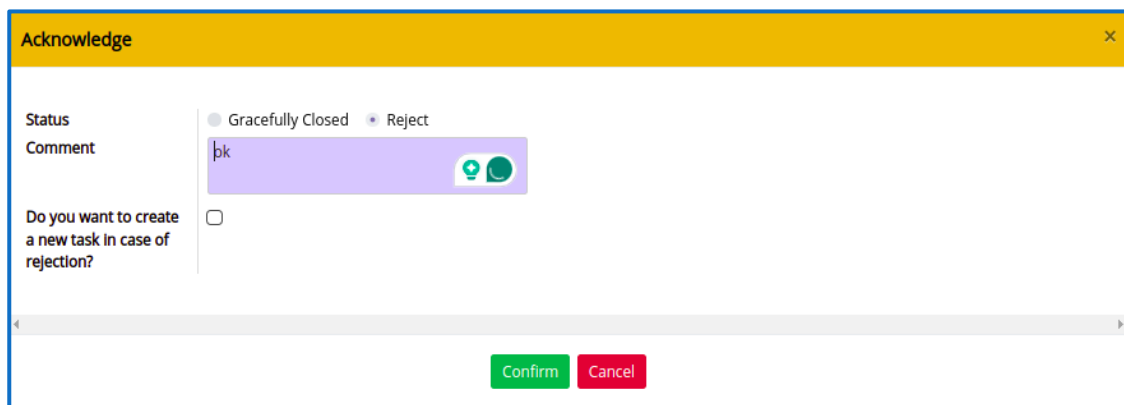


Figure 4-23 Acknowledge Screen (2)

With referring to **Fig. 4-23**-

- If the Assigner want to assign a new ticket
 - If Yes, click on the “Do you want to create a new task in case of rejection?” in the check box.
 - Click the **Confirm** button and further the page redirects to the Ticket Assign Form.

4.3.2 Configuration

In the configuration section, the assignee to configure the task type for the assignment.

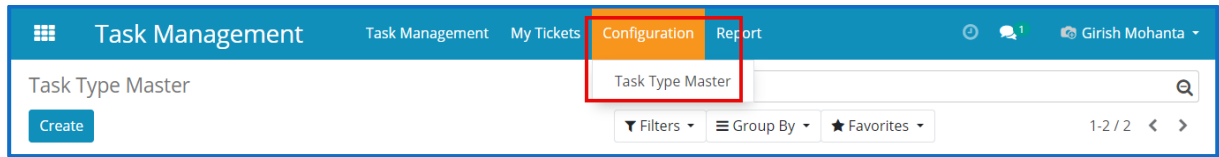


Figure 4-24 Configuration Screen

After clicking the Configuration tab, it further displays the sub-tab-

- Task Type Master

Further the page navigates to Task Type Master page (refer **Fig. 4-25**).

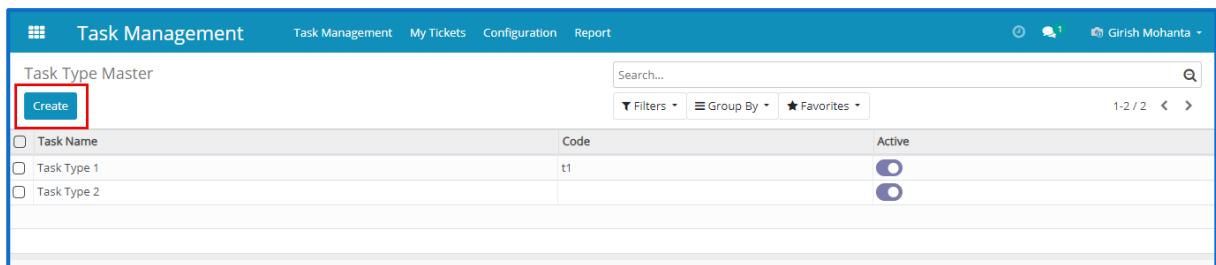


Figure 4-25 Task Type Master Screen (1)

In referring to **Fig. 4-25**, to create a new task type-

- Click the **Create** button and further the page expands (refer **Fig. 4-26**).

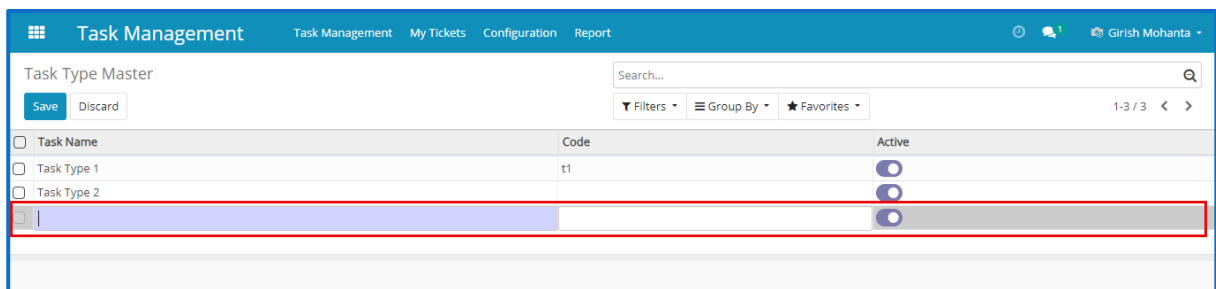



Figure 4-26 Task Type Master Screen (2)

With reference to **Fig. 4-26**-

- Enter the Task Name in text box field as highlighted in the figure.
- Enter the Code (task code) in the text box field as highlighted in the figure.
- To active the Task type, click in the radio button icon () under the Action section.
- Click the **Save** button.
 - To discard the task type, click the **Discard** button.


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