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User Manual for Task Management



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14-Mar-2024

User Manual For Task Management

REVISION HISTORY

Version	Description	Author	Date
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Kwantify - Task Management

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.

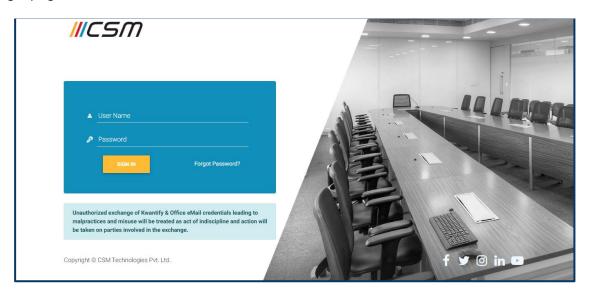


Figure 3-1 Log In Screen

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

- Enter the <u>User Name</u> (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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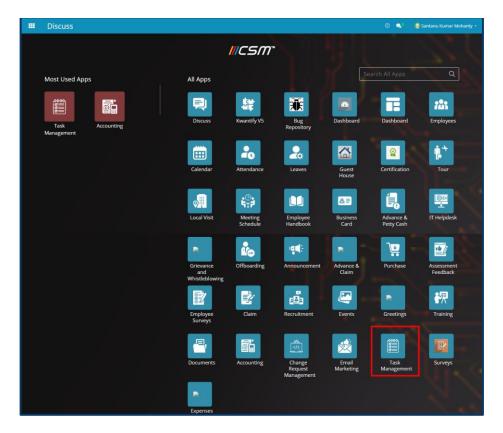


Figure 3-2 Menu Screen

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**.



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**):

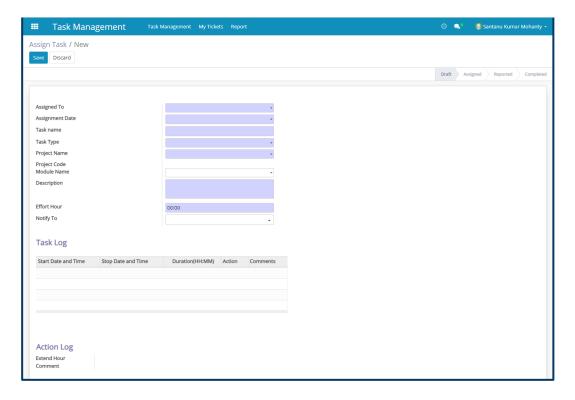


Figure 4-2 Assign Task/ New Screen (1)

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 <u>Time</u> is auto displayed.
- Enter the Task Name (name of the task to be assign to the assigner) in the text box field.
- Select the <u>Task Type</u> from the drop down menu that is to be assigned.

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- Select the <u>Project Name</u> (only the projects tagged to the respective user is displayed) from the drop down menu.
- The <u>Project Code</u> 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 <u>Description</u> 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.

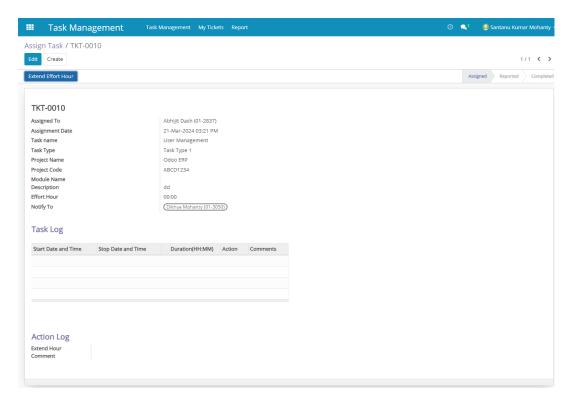


Figure 4-3 Assign Task/ New Screen (2)

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



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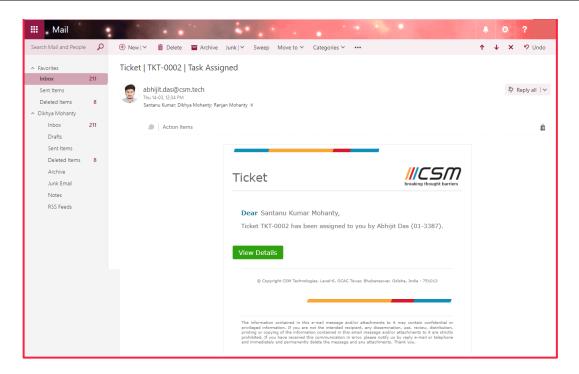


Figure 4-4 Mail Screen

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**).

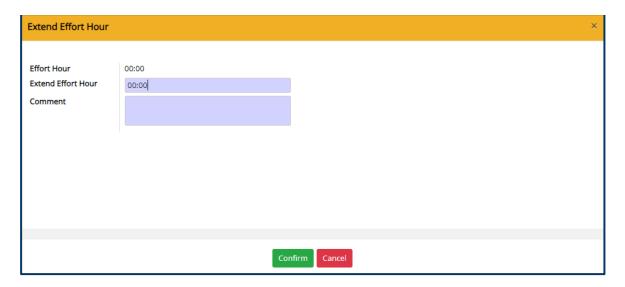


Figure 4-5 Extend Effort Hour Screen



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.

User Guide-

The user can find the entire procedure through User Manual under the User Guide section.

Click the **User Guide** tab and get navigated to the User Manual file document.

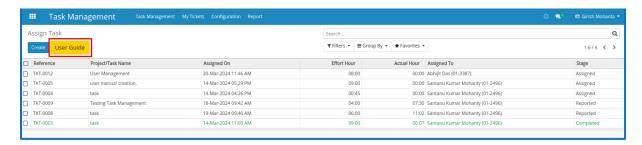


Figure 4-6 User Guide Screen

Referring to Fig. 4-6-

• Click the **User Guide** tab as highlighted in the figure and further the page navigates to the User Manual document (refer **Fig. 4-7**).



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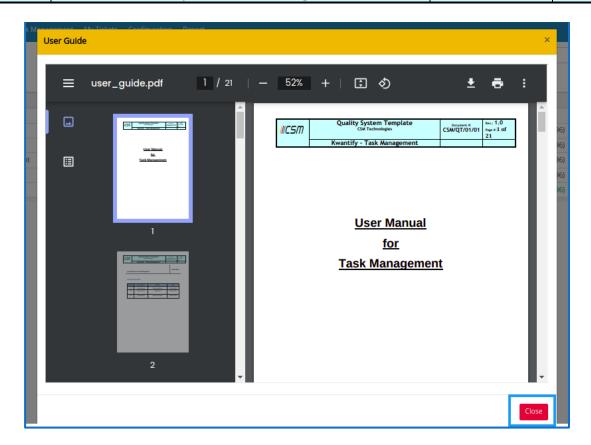


Figure 4-7 User Manual Screen

Referring to **Fig. 4-7**, in the User Manual document, the user to get the entire procedure of the Task Management module.

To close the user manual document, click the Close 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. 4-8**).



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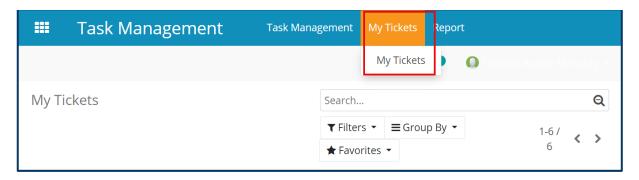


Figure 4-8 My Tickets Screen (1)

Click the My Tickets option and further the page displays all the assigned tasks (refer Fig. 4-9).

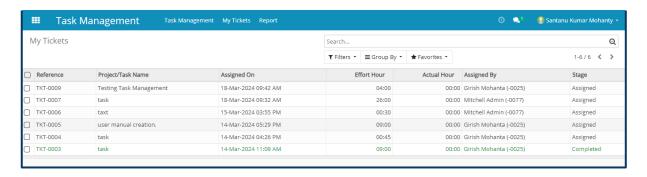


Figure 4-9 My Tickets Screen (2)

Referring to **Fig. 4-9**, 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. 4-10:



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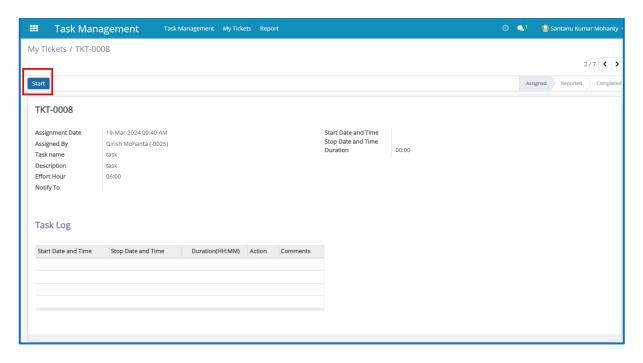


Figure 4-10 My Tickets Screen (3)

In referring to **Fig. 4-10**, 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. 4-11**).

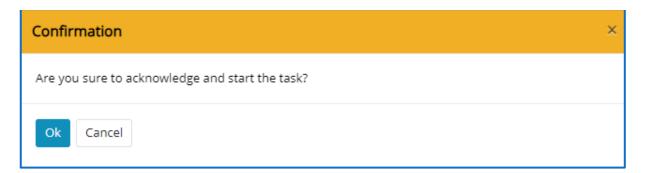


Figure 4-11 Confirmation Screen

In referring to 4-11, 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. 4-12**.



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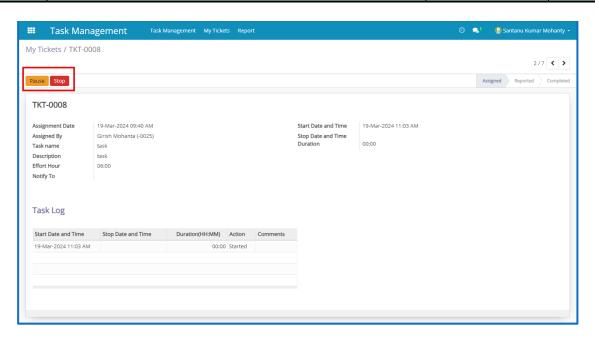


Figure 4-12 My Tickets Screen (3)

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

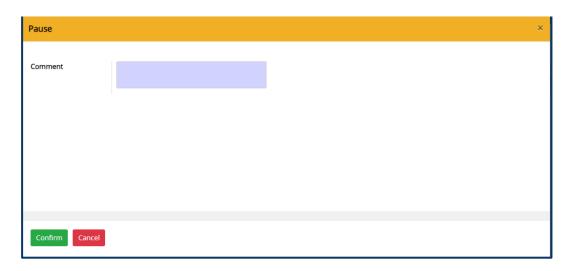


Figure 4-13 Pause Pop-up

In referring to 4-13-

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

Further the screen navigates to Fig. 4-14.



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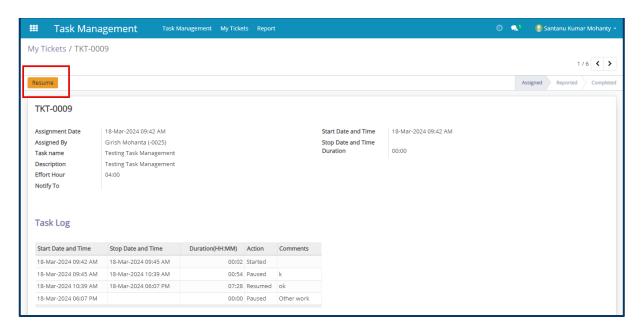


Figure 4-14 My Tickets Screen (4)

In reference to Fig. 4-14-

To resume the task, click the Resume button and further a pop-up populates in the screen (refer Fig. 4-15).

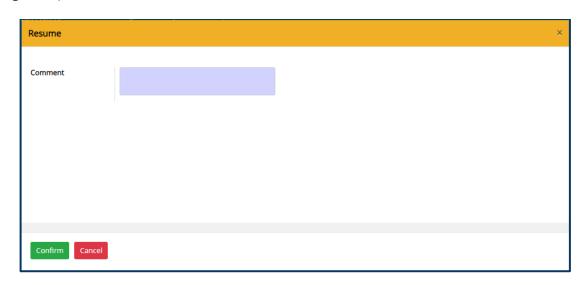


Figure 4-15 Resume Pop-up

In referring to Fig. 4-15-

- Enter the <u>Comment</u> (the reason why the task is resumed) in the text box field.
- Click the Confirm button.
 - o Or to cancel, click the Cancel button.
- To stop the task, click the Stop button (refer Fig. 4-12) and further a pop-up populates in the screen (refer Fig. 4-16).



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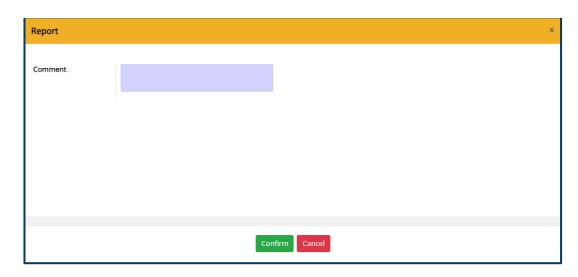


Figure 4-16 Report Pop-up

In referring to 4-16-

- Enter the Comment (the reason why the task is stopped) in the text box field.
- Click the Confirm button.
 - o 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 4-17 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. 4-18**.



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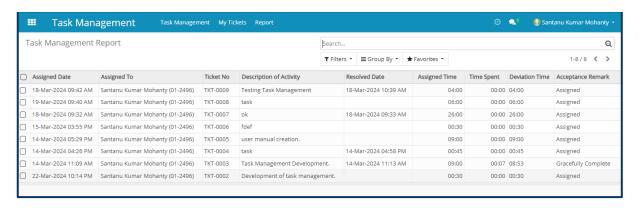


Figure 4-18 Task Management Report Screen (1)

In referring to **Fig. 4-18**, 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
 - o If the assignment is assigned, it displays as "Assigned".
 - o 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. 4-19**.



Figure 4-19 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. 4-20**.



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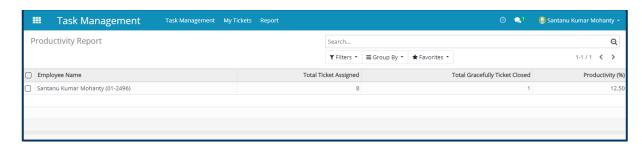


Figure 4-20 Productivity Report Screen

In referring to **4-20**, 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 (^{1/2})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. 4-21).



Figure 4-21 Take Action Screen (1)

In referring to 4-21-

 Click the Take Action button and further the page expands to display the detailed information (refer Fig. 4-22).



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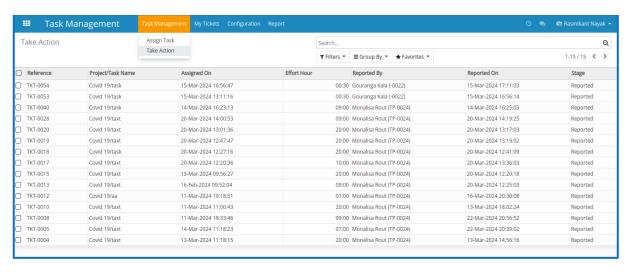


Figure 4-22 Take Action Screen (2)

In referring to **4-22**, 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. 4-23.

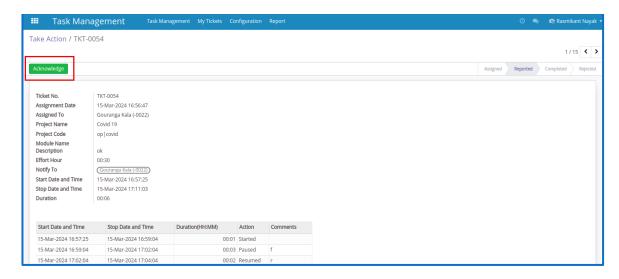


Figure 4-23 Take Action Screen

In referring to 4-23, 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. 4-24**).



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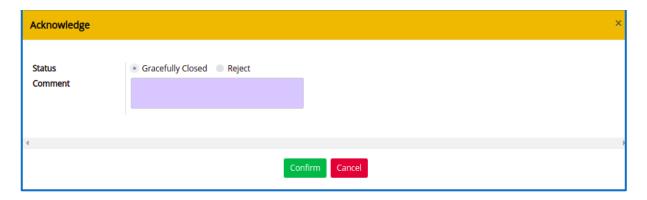


Figure 4-24 Acknowledge Screen (1)

In referring to 4-24, 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. 4-25).



Figure 4-25 Acknowledge Screen (2)

With referring to Fig. 4-25-

- 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.
 - o 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.



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Figure 4-26 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. 4-27**).

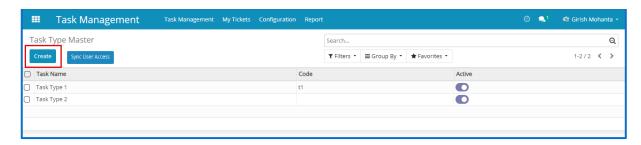


Figure 4-27 Task Type Master Screen (1)

In referring to Fig. 4-27, to create a new task type-

Click the Create button and further the page expands (refer Fig. 4-28).

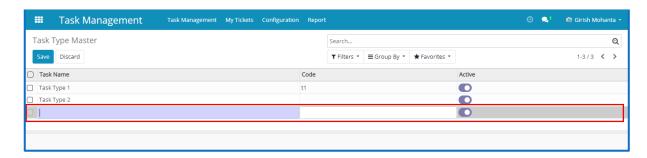


Figure 4-28 Task Type Master Screen (2)

With reference to Fig. 4-28-

- 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.

Further the user can sync the created user.



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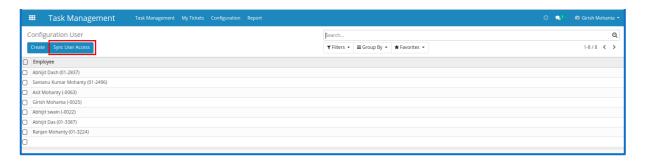


Figure 4-29 Sync User Access Screen

With reference to Fig. 4-29-

- Select the respective employee by clicking against the checkbox.
- Click the Sync User Access button as highlighted in the figure.

Further a confirmation pop-up populates the screen (refer Fig. 4-30).

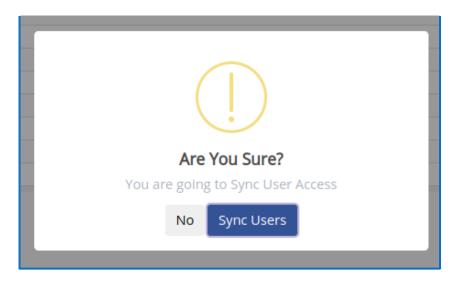


Figure 4-30 Confirmation Screen

With reference to **Fig. 4-30**, the confirmation page displays- "Are you sure? You are going to Sync User Access"

- Click the **Sync Users** button, to grant employees to get user access of the module.
- To cancel, click the No button.

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