



Enterprise Task Management Software

User Manual - Global Autotech

Date:23-07-2020

Ver:1.0

Purpose of this Software

To Improve Effectiveness of Monitoring and Reporting within the Organization

Important Roles

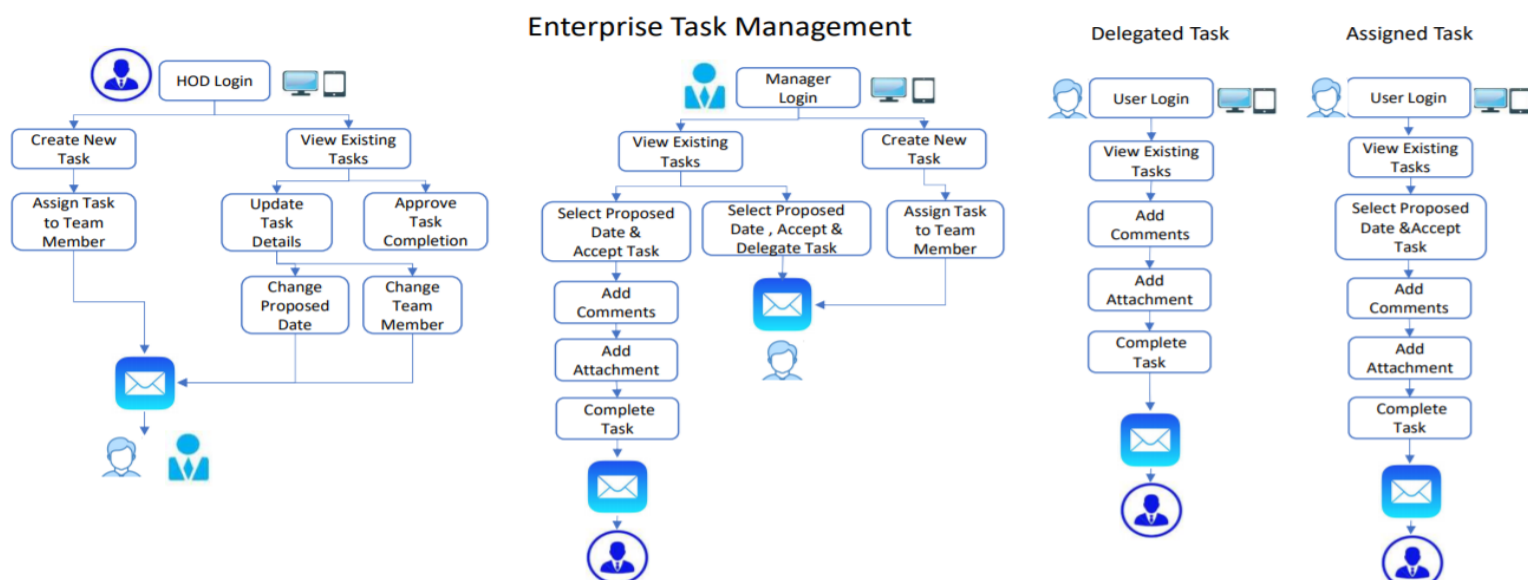
Reviewer (Initiator): Every Manager can be a Reviewer as he/she can initiate Tasks and allocate to his/her team. Once Task is completed by Doer, Reviewer will need to verify and confirm that Task is actually completed or he/she can change the status to **Not Complete (Pending)** and send it back to Doer.

Assignee: Every Employee can be assignee to whom a Task can be allocated by their managers. If Assignee happens to have a team reporting to him/her, he/she can accept and delegate tasks to his/her team. **Delegation is only possible once for a given task.**

Doer: Every Employee can be a Doer who accept the task given by his/her manager or receives delegated Task. Doer is expected to keep updated Task with relevant details and complete it as expected from his/her managers. Doer might have to **justify completion** of Task incase Reviewer asks for the same.

Admin: IT Team will work as User Administrator for this Application

Flow Chart Depicting flow of Information for HOD and his team. Here HOD can be replaced by any Senior Management Team member and rest of the flow will work for him/her & his/her team as shown below.

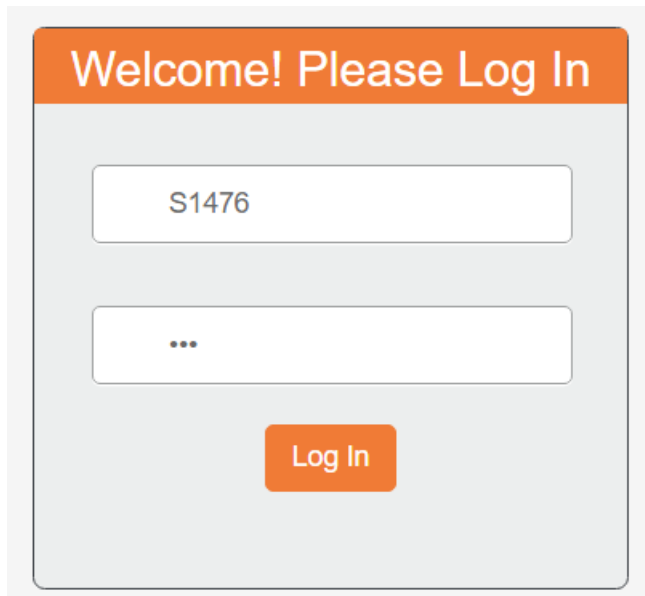


- HOD/Manager will be able to Allocate/Delegate task upto 2 levels below
- While Task Delegation, Task is Accepted by Manager by selecting appropriate Proposed Date & then Delegated to Team members

Few Screenshots for better visualization

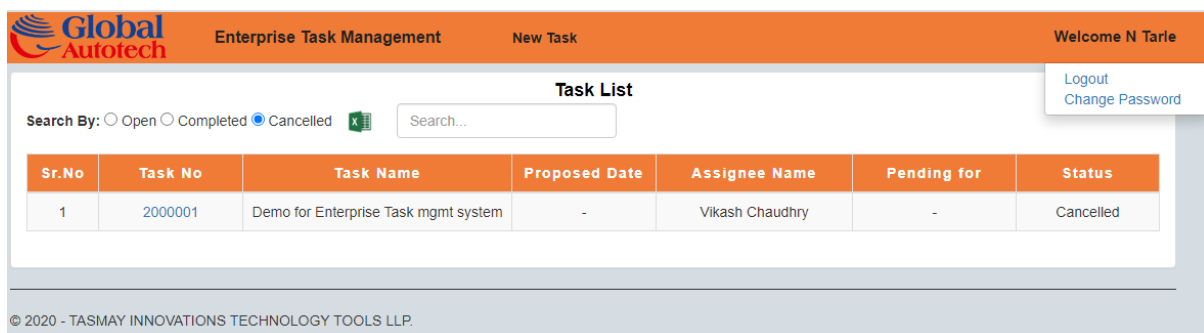
Login to Enterprise Task Management Application using **Employee Code**

<http://eTask>



The login screen features a light gray background with a central white box. At the top of this box is an orange header with the text "Welcome! Please Log In" in white. Below the header, there are two white input fields. The first field contains the text "S1476". The second field contains three dots "...". Below these fields is an orange button with the text "Log In" in white.

Change Password




The screenshot shows the main interface of the Enterprise Task Management application. At the top is an orange header bar with the Global Autotech logo on the left, the text "Enterprise Task Management" in the center, and "New Task" on the right. On the far right of the header is a user profile section with "Welcome N Tarle" and links for "Logout" and "Change Password". Below the header is a "Task List" section. It includes a "Search By:" filter with radio buttons for "Open", "Completed", and "Cancelled", and a search input field. Below the filter is a table with the following data:

Sr.No	Task No	Task Name	Proposed Date	Assignee Name	Pending for	Status
1	2000001	Demo for Enterprise Task mgmt system	-	Vikash Chaudhry	-	Cancelled


At the bottom of the page, there is a footer with the text "© 2020 - TASIMAY INNOVATIONS TECHNOLOGY TOOLS LLP."

New Task Creation Process

Task List Page

 Enterprise Task Management New Task Welcome N Tarle


Task List

Search By: ☒ Open ☐ Completed ☐ Cancelled 

Sr.No	Task No	Task Name	Proposed Date	Assignee Name	Pending for	Status
-------	---------	-----------	---------------	---------------	-------------	--------

© 2020 - TASMAY INNOVATIONS TECHNOLOGY TOOLS LLP.

Click on “New Task”

 Enterprise Task Management New Task Welcome N Tarle

New Task

Task Name: *

Task Description:

Expected Output :

Expected Target Date: *

Assignee (Doer): *


Review By:

Remark :


© 2020 - TASMAY INNOVATIONS TECHNOLOGY TOOLS LLP.

Task Name, Expected Target Date and Assignee needs to be selected without which New task can not be created. In Assignee Dropdown, Manager can see his reportees (upto 2 levels down).

Task List as shown below shows all open, Completed and Cancelled Tasks.

 Enterprise Task Management New Task Welcome N Tarle

Task List

Search By: ☒ Open ☐ Completed ☐ Cancelled 

Sr.No	Task No	Task Name	Proposed Date	Assignee Name	Pending for	Status
2	2000002	Prepare for Customer Visit	-	Amit Malik	Amit Malik	Pending

© 2020 - TASMAY INNOVATIONS TECHNOLOGY TOOLS LLP.

Task Acceptance and then Delegation

At per the flow, Task is **pending for acceptance**. Assignee will need to login to Enterprise Task Management application from his/her login to see their Task list.

Global Autotech Enterprise Task Management New Task Welcome Amit Malik

Task List

Search By: ☒ Open ☐ Completed ☐ Cancelled Search...

Sr.No	Task No	Task Name	Proposed Date	Assignee Name	Pending for	Status
1	2000002	Prepare for Customer Visit	-	Amit Malik	Amit Malik	Pending

© 2020 - TASMAY INNOVATIONS TECHNOLOGY TOOLS LLP.

After Clicking on Task No, that Task which is pending for Acceptance will open. A Mouse hover on the icon with Cap with show the name of Reviewer who has created this Task.

Global Autotech Enterprise Task Management New Task Welcome Amit Malik

Edit Task

Task Details (N Tarle, 23 Jul 2020)

Task No: 2000002 Status: Pending

Assignee: N Tarle Review By: N Tarle

Assignee: Amit Malik Doer: Amit Malik

Task Name: Prepare for Customer Visit Task Description: Form team to prepare for customer visit

Expected Output: Customer Satisfaction from Site Visit Expected Target Date: 31-Aug-2020

Proposed Date: 31-Aug-2020 Delegate To: Amit Malik

Remark:

September 2020


Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Accept Task Back

Logs :

new task initiate
Pls prepare well

Assignee needs to select **Proposed Date** after talking to his/her Manager. At this Stage Assignee can either accept the task by clicking on “Accept Task” button or Delegate further to their team as shown below.


Enterprise Task Management
New Task
Welcome Amit Malik

Edit Task

Task Details(N Tarle,23 Jul 2020)

Task No:	2000002	Status :	Pending
Assigneer:	N Tarle	Review By:	N Tarle
Assignee:	Amit Malik	Doer:	Amit Malik
Task Name:	<input type="text" value="Prepare for Customer Visit"/>	Task Description:	<input type="text" value="Form team to prepare for customer visit"/>
Expected Output:	<input type="text" value="Customer Satisfaction from Site Visit"/>	Expected Target Date:	31-Aug-2020
Proposed Date:	<input type="text" value="05-09-2020"/>	Delegate To:	<input type="text" value="Bhoopendra Singh"/>
Remark:	<input type="text"/>		


Accept & Delegate Task
Back

Logs :

23 July 2020 S1476
New Task Initiate
Pls prepare well

Assignee will have to accept the task as **ownership of Task remains on him/her** evening after delegating to his team member (Doer).

Below Task List screen shows delegated Task as represented by Arrow next to Assignee.


Enterprise Task Management
New Task
Welcome Amit Malik


Task List

Search By: ☒ Open ☐ Completed ☐ Cancelled

Sr.No	Task No	Task Name	Proposed Date	Assignee Name	Pending for	Status
1	2000002	Prepare for Customer Visit	05-Sep-2020	Amit Malik ➡	Bhoopendra Singh	Pending

© 2020 - TASMAY INNOVATIONS TECHNOLOGY TOOLS LLP.

Doer will need to login to Enterprise Task Management application from his/her login to see their Task list.


Enterprise Task Management
New Task
Welcome Bhoopendra Singh


Task List

Search By: ☒ Open ☐ Completed ☐ Cancelled

Sr.No	Task No	Task Name	Proposed Date	Assignee Name	Pending for	Status
1	2000002	Prepare for Customer Visit	05-Sep-2020	Amit Malik ➡	Bhoopendra Singh	Pending

© 2020 - TASMAY INNOVATIONS TECHNOLOGY TOOLS LLP.

After Clicking Task No, Task will open where Doer can capture process details of Task.


Enterprise Task Management
New Task
Welcome Bhoopendra Singh

Edit Task

Task Details (N Tarle,23 Jul 2020)


Task No :	2000002	Status :	Pending
Assigneer :	N Tarle	Review By :	N Tarle
Assignee :	Amit Malik	Doer :	Bhoopendra Singh
Task Name :	<input type="text" value="Prepare for Customer Visit"/>	Task Description :	<input type="text" value="Form team to prepare for customer visit"/>
Expected Output :	<input type="text" value="Customer Satisfaction from Site Visit"/>	Expected Target Date :	31-Aug-2020
Proposed Date :	05-Sep-2020		
Select Status of Task :	<input type="text" value="Pending"/>	Attachment :	<input type="button" value="Choose File"/> No file chosen
Remark :	<input type="text"/>		

Logs :

23 July 2020 879
Proposed Date Submitted and Delegated

All remarks are visible in Logs which stores remarks for every activity.

Task Completion Process


Enterprise Task Management
New Task
Welcome Bhoopendra Singh

Edit Task

Task Details (N Tarle,23 Jul 2020)

Task No :	2000002	Status :	Pending
Assigneer :	N Tarle	Review By :	N Tarle
Assignee :	Amit Malik	Doer :	Bhoopendra Singh
Task Name :	<input type="text" value="Prepare for Customer Visit"/>	Task Description :	<input type="text" value="Form team to prepare for customer visit"/>
Expected Output :	<input type="text" value="Customer Satisfaction from Site Visit"/>	Expected Target Date :	31-Aug-2020
Proposed Date :	05-Sep-2020		
Select Status of Task :	<input type="text" value="Completed"/>	Attachment :	<input type="button" value="Choose File"/> No file chosen
Remark :	<input type="text"/>		

Logs :

23 July 2020 879
Proposed Date Submitted and Delegated

On Completion of task, Doer will select status as Task Completed, upload attachment if any and submit task for **verification from Reviewer**.

Enterprise Task Management New Task Welcome Bhoopendra Singh

Task List

Search By: ☒ Open ☐ Completed ☐ Cancelled

Sr.No	Task No	Task Name	Proposed Date	Assignee Name	Pending for	Status
1	2000002	Prepare for Customer Visit	05-Sep-2020	Amit Malik	N Tarle	Verifying

© 2020 - TASMAY INNOVATIONS TECHNOLOGY TOOLS LLP.

Application will update change of status to relevant people over email to intimate people to complete their action.

Task Review Process

Reviewer will need to login to Enterprise Task Management application from his/her login to verify completed Tasks.

Enterprise Task Management New Task Welcome N Tarle

Edit Task

Task No : 2000002 Status : Verifying

Task Name : Prepare for Customer Visit Task Description : Form team to prepare for customer visit

Expected Output : Customer Satisfaction from Site Visit Expected Target Date : 31-Aug-2020

Assignee (Doer) : 879 Review By : 879

Remark : 879

Task Details (Amit Malik, 23 Jul 2020)

Proposed Date : 05-Sep-2020 Delegate To : Bhoopendra Singh


Task Status (Doer) : Completed

Select Status of Task : Not Completed Remark :

Logs :

23 July 2020 S1094
Task Completed by Doer

If Reviewer is not satisfied with task completed, he/she can change the status back to **Not Completed (Pending)** and send task back to Doer.


Enterprise Task Management
New Task
Welcome N Tarle

Search By:
☒ Open
☐ Completed
☐ Cancelled


Task List

Sr.No	Task No	Task Name	Proposed Date	Assignee Name	Pending for	Status
2	2000002	Prepare for Customer Visit	05-Sep-2020	Amit Malik ➡	Bhoopendra Singh	Pending

© 2020 - TASMAY INNOVATIONS TECHNOLOGY TOOLS LLP.

Task Recomplete Process

Doer will need to login to Enterprise Task Management application from his/her login to see their Task list.


Enterprise Task Management
New Task
Welcome Bhoopendra Singh

Edit Task

Task Details (N Tarle,23 Jul 2020)

Task No :2000002
Status :Pending

Assigneer :N Tarle
Review By :N Tarle

Assignee :Amit Malik
Doer :Bhoopendra Singh

Task Name :
Task Description :

Expected Output :
Expected Target Date :31-Aug-2020

Proposed Date :05-Sep-2020

Task Status (Doer) :Completed

Task Status (Reviewer) :Not Completed

Select Status of Task :
Attachment :
 Document1.txt

Remark :


Logs :

23 July 2020 S1476
Reviewer Submitted Recommendation
Pls Provide more details

Once Doer complete the task **as expected by Reviewer**, he/she can change status again to complete and provide related details before submitting Task.

Task Second Review Process

Reviewer can see this Task from his login as shown below

Enterprise Task ManagementNew TaskWelcome N Tarle

Edit Task

Task No :2000002

Status :Verifying

Task Name :

Prepare for Customer Visit

Task Description :

Form team to prepare for customer visit

Expected Output :

Customer Satisfaction from Site Visit

Expected Target Date :31-Aug-2020

Assignee (Doer) :879

Review By :879

Remark :879

Task Details (Amit Malik,23 Jul 2020)

Proposed Date :05-Sep-2020

Delegate To :Bhoopendra Singh

Task Status (Doer) :Completed

Attachment:[Document1.txt](#)

Task Status (Reviewer):Not Completed

Select Status of Task :

Verified


Remark :

SubmitBack


Logs :


23 July 2020 S1094
Task Completed by Doer
Pls refer attached file

Now Reviewer may be satisfied with completion of Task and change status to **Verified**. This moves task to completed Task List.

Enterprise Task ManagementNew TaskWelcome N Tarle

Task List


Search By: ☐ Open ☒ Completed ☐ Cancelled 

Sr.No	Task No	Task Name	Proposed Date	Assignee Name	Pending for	Status
2	2000002	Prepare for Customer Visit	05-Sep-2020	Amit Malik 	-	Completed

© 2020 - TASMAY INNOVATIONS TECHNOLOGY TOOLS LLP.

Task Cancellation

Reviewer can cancel any Task by opening the task from Task list as long as its status is Pending, Such Cancelled Task can be seen in Cancelled Task List as show below.




Enterprise Task Management

New Task

Welcome N Tarle

Task List

Search By: ☐ Open ☐ Completed ☒ Cancelled 

Sr.No	Task No	Task Name	Proposed Date	Assignee Name	Pending for	Status
1	2000001	Demo for Enterprise Task mgmt system	-	Vikash Chaudhry	-	Cancelled

© 2020 - TASMAY INNOVATIONS TECHNOLOGY TOOLS LLP.