iMS SYSTEMS

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ADDVantage TECHNOLOGIES

Task Manager

Key

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Adding a Task

Enter the name of the Task

Enter a description of the Task

Is it a Team Task?

No

Yes

Select the relevant Asignee(s)

Check the "Team task" box

Select the relevant Business Unit

Select the Priority level

Low, Medium, High

Select the Due Date of the Task

Do you need to Upload any Documents?

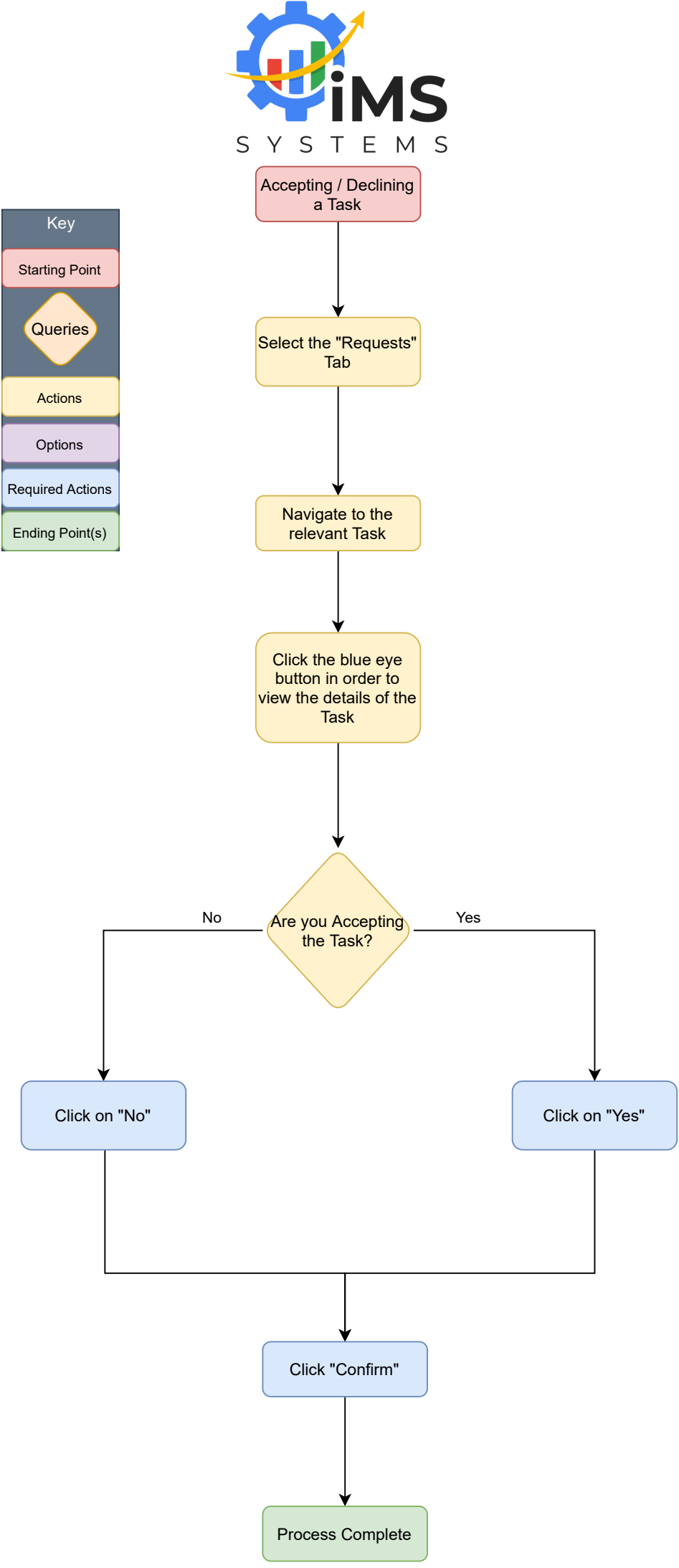
Yes

No

Drag and Drop the Document into the Attachment Field
or
Click in the Attachment Field, Navigate to the Document and Select it

Click "Create"

Process Complete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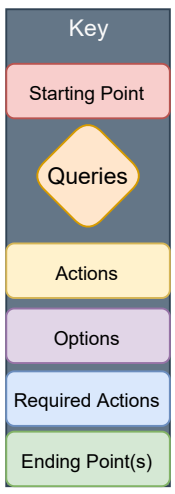
Accepting / Declining a Task
Select the "Requests" Tab
Navigate to the relevant Task
Click the blue eye button in order to view the details of the Task
Are you Accepting the Task?
No
Yes
Click on "No"
Click on "Yes"
Click "Confirm"
Process Complete



Modifying a Task

Select the "My tasks" Tab

Select the View Details (Eye) icon next to the relevant Task

Select the "Amend task" Tab

Modify the name of the Task, if required

Modify the description of the Task, if required

Is it a Team Task?

No

Yes

Do you want it to be a Team Task?

No

Yes

Ensure the "Team task" box is unchecked

Modify the relevant Asignee(s), if required

Ensure the "Team task" box is checked

Modify the relevant Business Unit, if required

Do you want it to be an Individual Task?

No

Yes

Uncheck the "Team task" box

Modify the relevant Asignee(s), if required

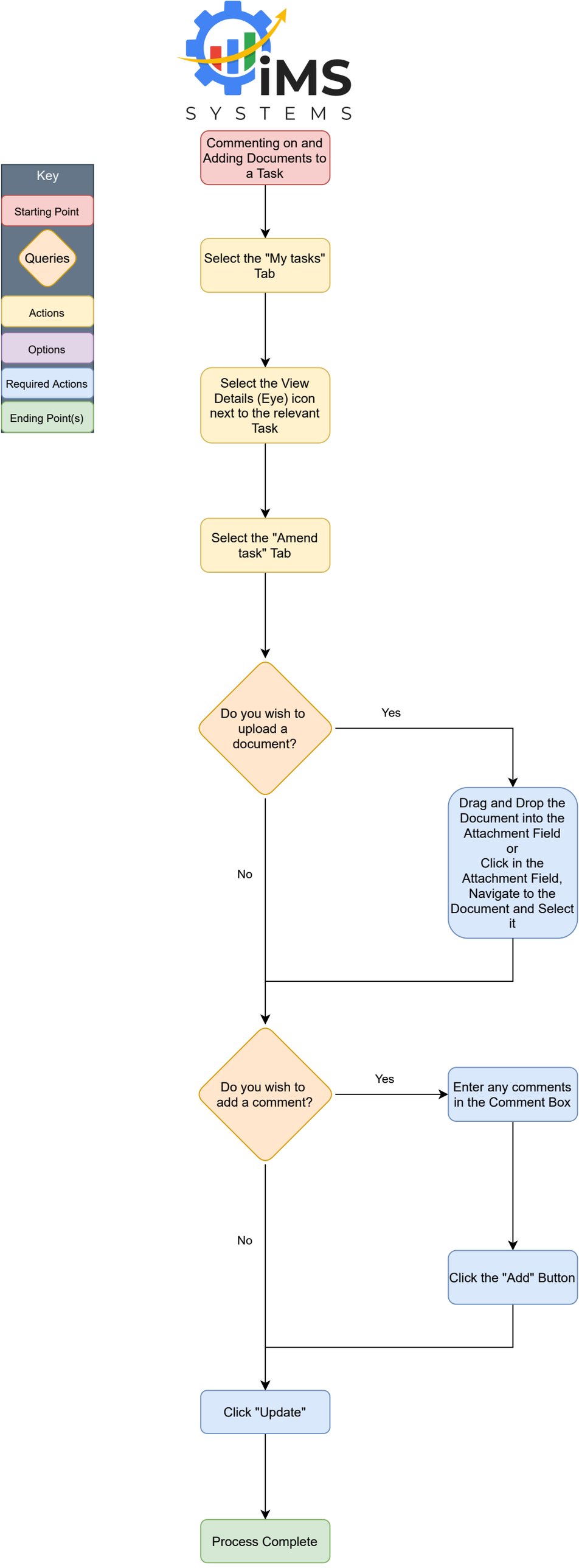
Modify the Priority level, if required

Low, Medium, High

Modify the Due Date of the Task, if required

Click "Update"

Process Complete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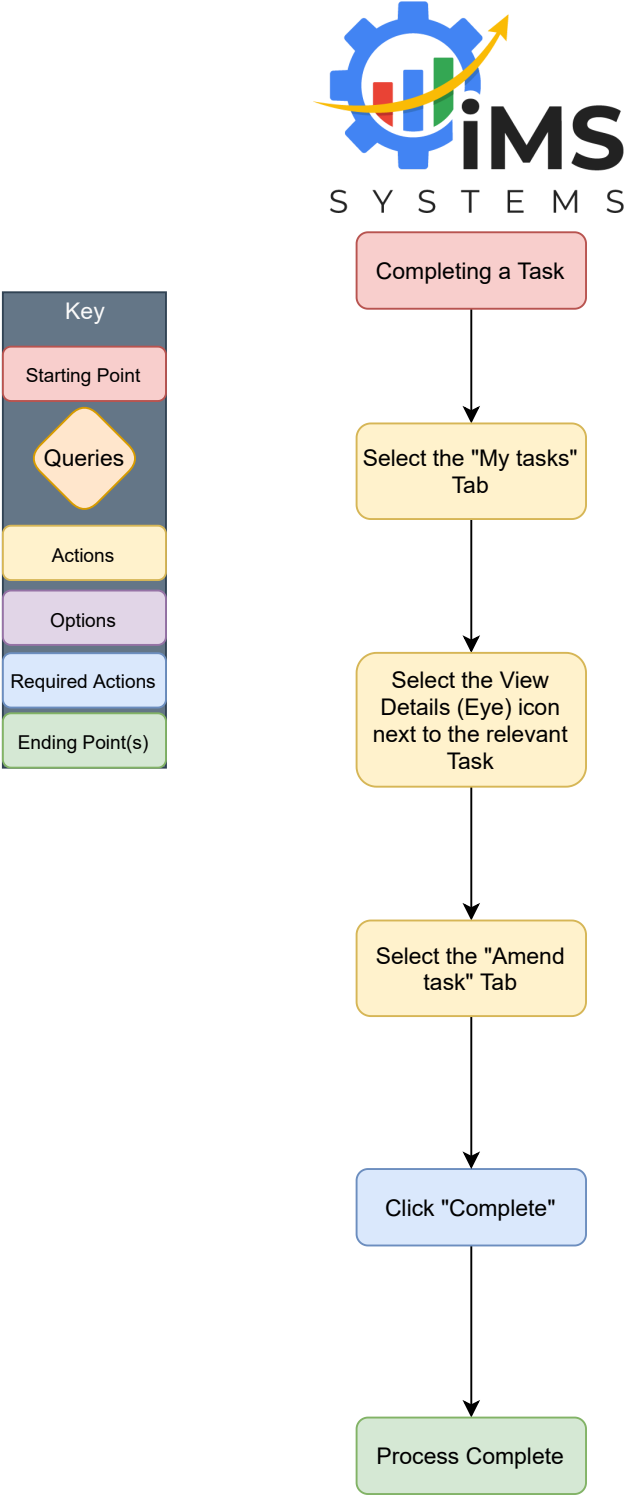
Commenting on and Adding Documents to a Task
Select the "My tasks" Tab
Select the View Details (Eye) icon next to the relevant Task
Select the "Amend task" Tab
Do you wish to upload a document?
Yes
No
Drag and Drop the Document into the Attachment Field
or
Click in the Attachment Field, Navigate to the Document and Select it
Do you wish to add a comment?
Yes
No
Enter any comments in the Comment Box
Click the "Add" Button
Click "Update"
Process Complete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Completing a Task
Select the "My tasks" Tab
Select the View Details (Eye) icon next to the relevant Task
Select the "Amend task" Tab
Click "Complete"
Process Complete