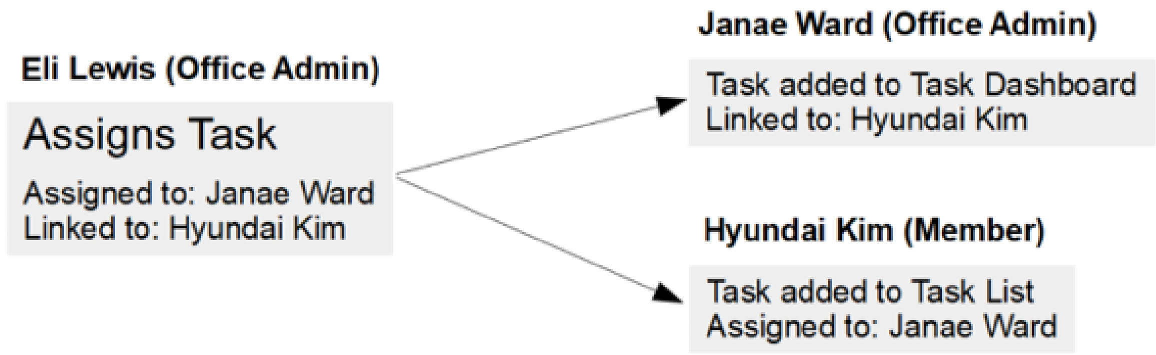
TASK MANAGEMENT
Basic Overview and Introduction

Task Management

Each Task created is (1) assigned to an Office Admin user for completion, and (2) linked to a Member/Applicant user.

Example:



Each Task should be able to be assigned multiple times to Office Admin users, as long as they are linked to different Members/Applicant users.

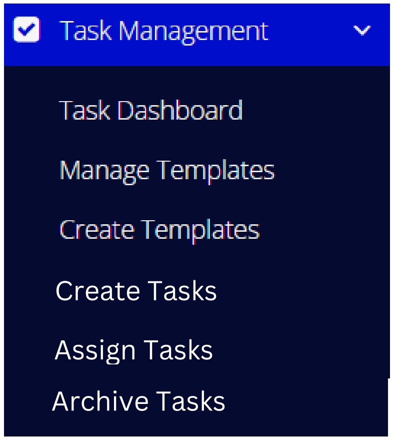
Task Templates
Basic Overview and Introduction

Tasks Templates are groups of individual tasks.

- When task templates are created by the Admin account, the Office Admin for each task in group is pre-assigned.
- When a template is assigned, the tasks are then all linked to a selected Member.

The tasks are the main component of the task management system, not the templates. The templates are used when we want to assign a **group** of tasks to complete.

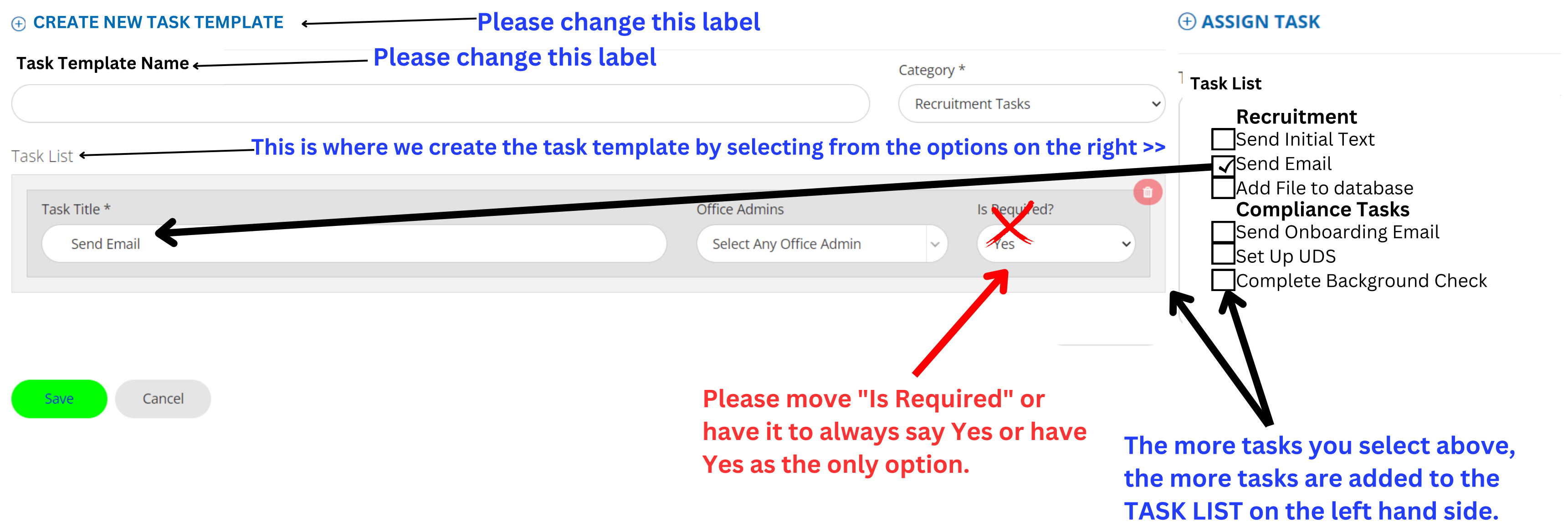
Right now, the template is created first and then each task is created. **This process should be reversed.** Each individual task should be created first. Then the template can be created (from Create Templates page) by selecting which tasks to be included in template/group. This is so each task can be assigned individually or can be assigned as part of a template (group of tasks).



Please add "Create Tasks" here (Discussed below)

The “Create Templates” tab should look similar to the Create Task tab, except here user creates the name of the template and then selects from a list of all tasks which to include in new template.

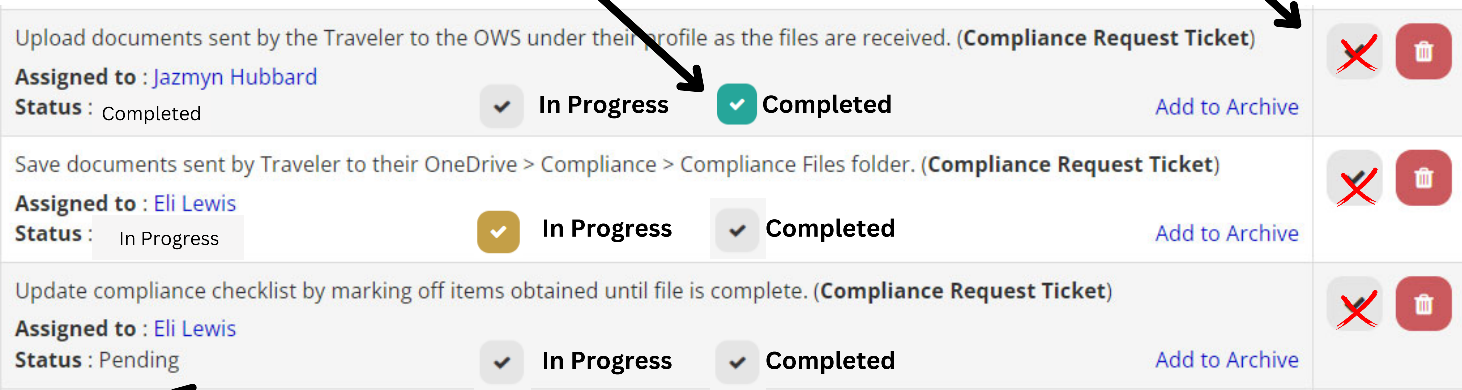
Note: We will need a way to sort/categorize all the tasks when we create a template (maybe use the Task Category as sort?) And will need a way to choose the order the selected tasks will be listed in template.



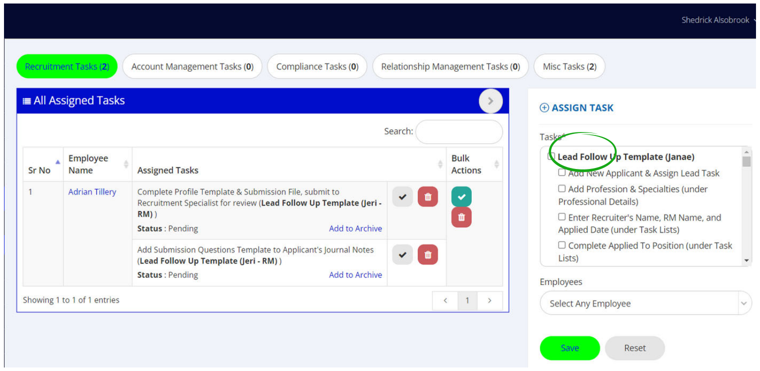
Admin/Office Admin > Assign Task View

Remove the check boxes here

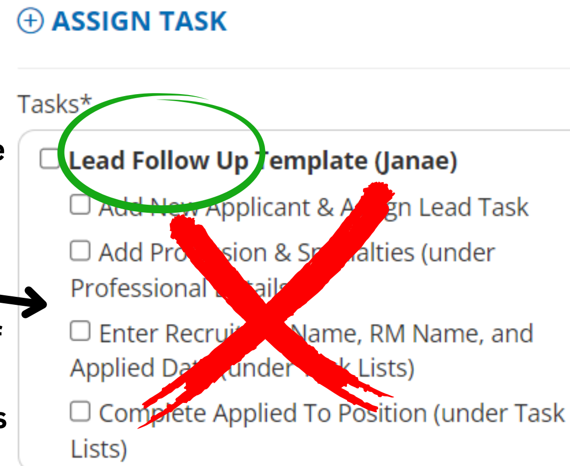
When the status is changed/managed here



Pending tasks - Check marks will remain gray. When all tasks are first assigned, the will be gray.



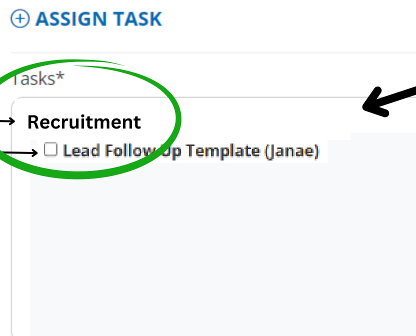
The info below the template should be removed from this view.



Only the Title of the template will show here as an option.

Task Template Category

Task Template



Although the Title of the Template is being selected here, all the tasks included should be assigned accordingly and should appear in all areas accordingly.