

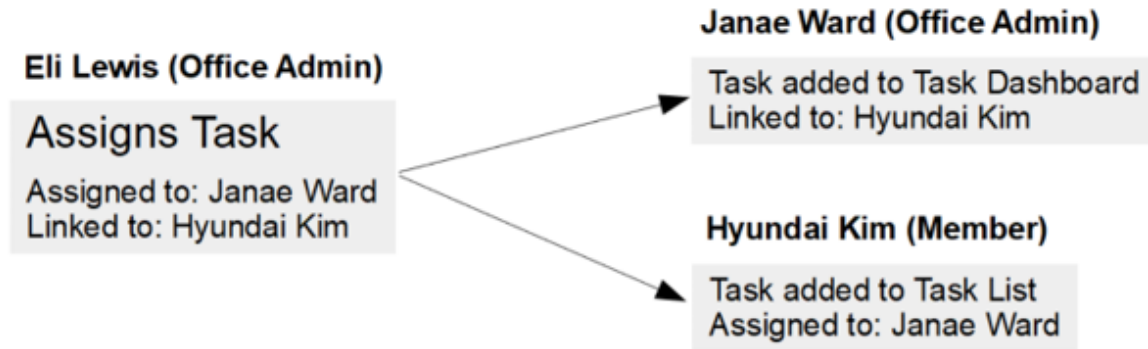
TASK MANAGEMENT

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

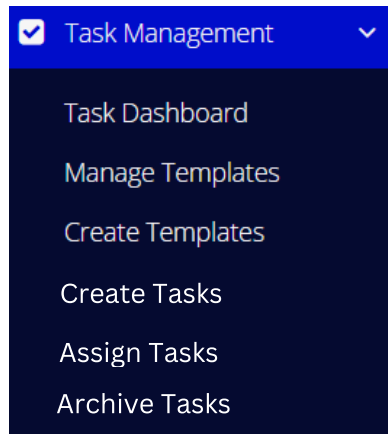
Tasks Templates are groups of individual tasks.

- 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.

⊕ CREATE NEW TASK TEMPLATE

Task Template Name

Category *

Recruitment Tasks

Task List

Task Title *

Send Email

Office Admins

Select Any Office Admin

Is Required?

Yes

Save

Cancel

⊕ ASSIGN TASK

Task List

Recruitment

☐ Send Initial Text

☒ Send Email

☐ Add File to database

Compliance Tasks

☐ Send Onboarding Email

☐ Set Up UDS

☐ Complete Background Check

This is where we create the task template by selecting from the options on the right >>

Please change this label

Please change this label

Please move "Is Required" or have it to always say Yes or have Yes as the only option.

The more tasks you select above, the more tasks are added to the TASK LIST on the left hand side.

When the status is changed/managed here

✗ Remove the check boxes here

Upload documents sent by the Traveler to the OWS under their profile as the files are received. (Compliance Request Ticket)	<input checked="" type="checkbox"/> In Progress <input checked="" type="checkbox"/> Completed	Add to Archive	<input checked="" type="checkbox"/> <input type="checkbox"/>
Save documents sent by Traveler to their OneDrive > Compliance > Compliance Files folder. (Compliance Request Ticket)	<input checked="" type="checkbox"/> In Progress <input checked="" type="checkbox"/> Completed	Add to Archive	<input checked="" type="checkbox"/> <input type="checkbox"/>
Update compliance checklist by marking off items obtained until file is complete. (Compliance Request Ticket)	<input checked="" type="checkbox"/> In Progress <input checked="" type="checkbox"/> Completed	Add to Archive	<input checked="" type="checkbox"/> <input type="checkbox"/>

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

Shedrick Absbrook

Recruitment Tasks (2) Account Management Tasks (0) Compliance Tasks (0) Relationship Management Tasks (0) Misc Tasks (2)

All Assigned Tasks

Search:

Sr No	Employee Name	Assigned Tasks	Bulk Actions
1	Adrian Tillery	<p>Complete Profile Template & Submission File, submit to Recruitment Specialist for review (Lead Follow Up Template (Jeri - RM))</p> <p>Status : Pending Add to Archive</p> <p>Add Submission Questions Template to Applicant's Journal Notes (Lead Follow Up Template (Jeri - RM))</p> <p>Status : Pending Add to Archive</p>	<div><div></div><div></div><div></div></div>

Showing 1 to 1 of 1 entries

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

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

+ ASSIGN TASK

Tasks*

☐ Lead Follow Up Template (Janae)

☐ Add New Applicant & Assign Lead Task

☐ Add Profession & Specialties (under Professional Details)

☐ Enter Recruiter's Name, RM Name, and Applied Date (under Task Lists)

☐ Complete Applied To Position (under Task Lists)

+ ASSIGN TASK

Task Template Category → Recruitment

Task Template → ☐ Lead Follow Up Template (Janae)

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.