Task Management Module

EPM Connect Guide

Contents

Task Management Module Guide

Our Task Management module brings it all together. Each module with EPM Connect creates a variety of automated tasks to keep you on track. From Return to Work forms and absence, expense and time claims approvals, to document review and signatures, a variety of tasks are automatically generated following various actions.

The Task Management module allows you to view all tasks and track task completion across all modules within a unified platform. Plus create your own tasks to assign to individuals and teams, manage starter and leaver tasks. set reminders and share documents.

General Guidance

Each tab lists all tasks relevant to that tab and the **User/User group** the task is **Assigned to**, **Date Due** and the user the task is related to.

My Tasks display all tasks related to yourself as a user.

All Tasks display all tasks assigned to any users within the property.

Overdue Tasks display all overdue tasks.

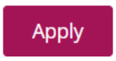
Completed Tasks display all completed tasks. This tab will also display who the task was completed by (**Done By**) and date completed (**Date Done**).

The columns within each tab indicate the **Title** of the task, who the task is **Assigned To**, **Assigned To User Groups** (any User Groups the task has been assigned to), the **Date Due** and who the task is **Related To**.

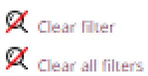
The system will automatically generate **Return To Work Forms** and **Self Certification**.

Column headings in a bold text with a magnifying glass icon can be filtered or sorted alphabetically, chronologically, or numerically depending on the content of the column. To sort the column, click on the column heading. Click a second time to reverse the sorting.

To search in a column, click on the magnifying glass in the header of the column you want to search. From the drop-down list, select the rule for your search then add the criteria in the text box below and click **Apply**. The magnifying glass will change colour once the filter is applied.



To turn off the filter, re-click on the magnifying glass icon and click **Clear Filter**.



Summary (including Metrics)

The Summary section of the module provides a variety of metrics, including **All Tasks** and **All Completed Tasks**.

1. On the left-hand side of the EPM Connect window, select **Task Management**. A list of further menu options is displayed.
2. Select **Summary**. The **Task Management** module is displayed and a variety of metrics and infographics visible.

To view more details, click the arrow in the top right corner of any of these metrics to move into specific details, including the tasks these relate to, or the users they were assigned to.

Scroll down to view further analytics, including tasks that have been assigned to you.

All Tasks (View, Edit and Manage Tasks)

All Tasks allows you to view, edit and manage tasks. Mark tasks as complete, add a response and add any relevant documents.

View Tasks

1. On the left-hand side of the EPM Connect window, select **Task Management**. A list of further menu options is displayed.
2. Select **All Tasks**. The **All Tasks** page is displayed and a variety of tabs displayed.
3. Select the relevant tab.

4. Click on the eye icon on the far right of the record or on the **Title** to view the individual task. The **Task Details** are displayed.

Click the **Export** button to export the data, selecting from the drop-down either **Word** or **Excel** format. The file will appear in your downloads.

Edit a Task

1. Click the **Edit Task** button and amend any relevant details.
2. To reassign the task, in the **Assign To** field, click the **x** next to the employee's name and type the name of a new employee and choose from the options displayed.
3. To assign the task to an additional employee, click on the text box and select the employee you wish to assign the task to.
4. Click **Save** to finish.

Any changes made to a task will be recorded within the **Audit Trail** of that task.

Mark a Task as Completed and Adding a Response

1. From the **Status** drop-down, select **Completed**. This will move the task to **Completed Tasks** in the **Summary** page.
2. In the **Response** text box, add a response. This can be as simple as 'Task completed', or can include relevant notes.
3. Click the **Upload File** button to upload any relevant documents.

Create a Reminder

1. Click the **+ Reminder** button to add a reminder. A new window is displayed.
2. In the **Title** text box, enter a title.
3. In the **Description** text box, enter a description.
4. In the **Notify before Due Date** text box, enter the number of days' notice required.
5. From the drop-down menu, select **Days**, **Weeks** or **Months**.
6. Select either or both **Notify by Email** and **Notify by Popup**.

   We recommend selecting both **Notify by Email** and **Notify by Popup**, or **Notify by Email** only, as not all users will regularly use the system. You can create as many reminders as you feel appropriate.

   If a task is already overdue you can send a reminder by setting up a new reminder.

   Reminders can be edited by clicking the pencil icon or clicking the red **x**.

7. Click **Save** to finish.

Create a task

Tasks can be created either within the task management section, or within the employee's overall record or against an individual employee job role.

General guidance

We recommend selecting both **Notify by Email** and **Notify by Popup**, or **Notify by Email** only, as not all users will regularly use the system. Create as many reminders as appropriate.

If a task is already overdue you can send a reminder by setting up a new reminder.

Tick the **One or Many Tasks** box to create individual tasks for each user.

If left unticked then only one of the selected employees need to complete the task, for the task to be marked as complete.

Reminders can be edited by clicking the pencil icon.

Create a task within Task Management

In this section you can create tasks for anything you wish.

1. On the left-hand side of the EPM Connect window, select **Task Management**. A list of further menu options is displayed.
2. Click **Add Task**. The **+ New Task** page is displayed.
3. In the **Task Title** text box, enter a title.
4. In the **Description** text box, enter a description and include a URL as part of the description to link to external resources.
5. Click **Assign To Bureau** if you wish to assign the task to your EPM team.
6. In the **Assign To** text box, type the name of an employee.
7. Continue to add all relevant employees. There is no limit.
8. To remove an employee, click the **x** next to the employee's name.
9. From the **Assign User Group** drop-down menu, select any relevant user groups.

   This will add all employees within the user group within the **Assign To** text box, allowing you to remove any employees, should this be required.

10. Tick the **One or Many Tasks** box to create individual tasks for each user. If left unticked then only one of the selected employees need to complete the task, for the task to be marked as complete.
11. In the **Related To** text box, enter the name of the employee that the task relates to, or the user who has set the task
12. In the **Due Date** text box, select a date from the calendar.
13. To upload a file, click the **Upload File** button and choose the file you wish to upload. This is not a mandatory step.

Create a Reminder

1. Click the **+ Reminder** button to add a reminder. A new window is displayed.
2. In the **Title** text box, enter a title.
3. In the **Description** text box, enter a description.
4. In the **Notify before Due Date** text box, enter the number of days' notice required.
5. From the drop-down menu, select **Days**, **Weeks** or **Months**.
6. Select either or both **Notify by Email** and **Notify by Popup**.
7. Click **Save** to finish. You will return to the main screen.

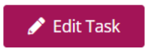
8. Click **Save** to finish. The task will be distributed and the page will reset to allow you to create additional tasks.

Create and assign a new task within an Employee Record

It may sometimes be easier to create and assign a task within the employee record.

1. On the left-hand side of the EPM Connect window, select **Employees**. A list of further menu options is displayed.
2. Select **Details**. A list of further menu options is displayed.
3. Select **All Employees**. The **All Employees** page is displayed.
4. Select an employee from the employees listed.
5. Click the **Edit Details** button. The page refreshes.

6. Scroll down and click the **Task** tab on the left hand side. A new page is displayed.

   A list of all current tasks will be displayed.

7. To add a task in this section, click **+ Add Task**. A new window opens. The task will be set up in relation to their start date.
8. In the **Task Title** text box, enter a title.
9. In the **Description** text box, enter a description and include a URL as part of the description to link to external resources.
10. In the **Assign To** text box, type the name of an employee.
11. Continue to add all relevant employees, there is no limit.
12. To remove an employee, click the **x** next to the employee's name.
13. Click the **Add** button to add user groups. Check the box next to all user groups you wish to add.

14. From the **Assign User Group** drop-down, select any relevant user groups. This will add all employees within the user group within the **Assign To** text box, allowing you to remove any employees, should this be required.
15. Tick the **One or Many Tasks** box if all employees you have selected need to complete the task. Leave the box unticked if only one employee needs to complete the task.
16. In the **Related To** text box, enter the name of the employee that the task relates to, or the user who has set the task.
17. In the **Due Date** text box, select a date from the calendar.
18. To upload a file, click the **Upload File** button and choose the file you wish to upload. This is not a mandatory step.
19. Click the **+ Reminder** button to add a reminder. A new window is displayed.
20. Select the **Reminder** tab and click the **+ Reminder** button.
21. In the **Title** text box, enter a title.
22. In the **Description** text box, enter a description.
23. In the **Notify before Due Date** text box, enter the number of days' notice required.

    This defaults to **Days** but can be amended to **Weeks** or **Months**.

24. From the drop-down indicating **Days** select the option you require.
25. Select either or both **Notify by Email** and **Notify by Popup**.
26. Click **Save** to finish. You will return to the original screen.
27. Click **Save** to finish. The task will be distributed and the page will reset to allow you to create additional tasks.

Create Task Templates

Task templates can be used to create a group of tasks, for starters and leavers within specific user groups, or individuals. This is managed within the **Employees** module. Here you can set up groups of your starter & leaver tasks e.g. tasks that apply for all staff or tasks that apply for teaching staff.

These can then be applied to individuals when adding their roles or from within the Starter/Leaver Task Tab within an Employee's Record.

This should be used for tasks that are consistently applied and created in the same manor. There are a number of task templates already in the system.

1. On the left-hand side of the EPM Connect window, select **Employees**. A list of further menu options is displayed.
2. Select **Settings.** The **Employees Settings** page is displayed.
3. Select the **Task Templates** tab. The first **Task** tab is displayed.

Create a task

To create a task template with multiple tasks, you must first create individual tasks.

1. Click **Add Task**. The **+ New Task** page is displayed.
2. In the **Task Title** text box, enter a title.
3. In the **Description** text box, enter a description and include a URL as part of the description to link to external resources.

   When adding a task that can be distributed at any time in the future, do not create a due date. Instead complete the **Activation Option** and **Activation Period**. This will allow you to distribute this task in the future and allow the due date to be calculated using this information.

   The default activation option is **Apply Template Date**. This determines the number of days after the due date that the task is sent out.

   If you select **Job Role Start Date**, the task will be sent out on the day the employee starts their role.

   If you select **Job Role End Date**, the task will be sent out on the day the employee finishes their role.

   The **Days/Weeks/Months** drop-down allows you to set the period in which you wish to set a due date.

   The **Activation Period** allows you to set the number of Days/Weeks/Months before or after the task has been set. This can be moved to minus dates, which allows you to set a date before the employees starts or leaves.

   The **Days to Complete** field allows you to set the number of days the employee has to complete the task.

4. In the **Activation Option** drop-down, select an option.
5. In the next drop-down, select **Days**, **Weeks** or **Months**.

6. In the **Activation Period**, move the toggle to set the number of days ahead of the **Apply Template Date/ Job Role Start Date** or **Job Role End Date**.
7. In the **Days to Complete** field, select the number of days the employee has to complete the task.
8. In the **Assign To** text box, type the name of an employee.
9. Continue to add all relevant employees, there is no limit.

   To remove an employee, click the **x** next to the employee's name.

10. From the **Assign User Group** drop-down, select any relevant user groups. This will add all employees within the user group within the **Assign To** text box, allowing you to remove any employees, should this be required.
11. Tick the **One or Many Tasks** box to create individual tasks for each user. If left unticked then only one of the selected employees need to complete the task, for the task to be marked as complete.

Create a Reminder

1. Click the **+ Reminder** button to add a reminder. A new window is displayed.
2. In the **Title** text box, enter a title.
3. In the **Description** text box, enter a description.
4. In the **Notify before Due Date** text box, enter the number of days' notice required.
5. From the drop-down menu, select **Days**, **Weeks** or **Months**.
6. Select either or both **Notify by Email** and **Notify by Popup**.
7. Click **Save** to finish. You will return to the screen.

8. Click **Save** to finish. The task will be distributed and the page will reset to allow you to create additional tasks.

Create a task template

Once you have created the relevant individual tasks, you can create a task template which groups these tasks.

1. Select the **Task Template** tab. The tab information is displayed.
2. Click **Create Template**. A new **Manage Template** window is displayed.
3. In the **Title** text box, enter a title.
4. In the **Type** drop-down, select from **General**, **Leaver** or **Starter**.
5. In the **Tasks** drop-down, select all the tasks that apply.
6. Click **Save** to finish. The window closes.

Edit a task within Task Templates

If a task is related to a current template, it cannot be removed or edited. To edit or remove the task, remove the task from template it relates to.

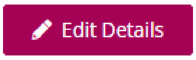
To remove a task from a task template, click the **Task Template** tab. A new window will open. Remove the tasks linked to that template and click **Save** to finish. That task will now be available to edit.

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Settings**. The **Employees Settings** page is displayed.
3. Select the **Task Templates** tab. The first **Task** tab is displayed.
4. Select the **Templates** tab.
5. Click the pencil icon next to the task you wish you edit. The **Manage Template** tab opens.
6. Make any changes as appropriate.
7. Click **Save** to finish.

Assign a Task Template to an Employee

Once task templates have been created, you can assign a Task Template (a group of tasks) to an employee. This is managed within their employee record within the **Employees** section.

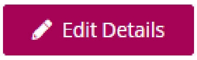
1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**.
3. Click **All Employees**. The **All Employees** page is displayed.
4. Select an employee from the employees listed.
5. Scroll down and click the **Task** tab on the left hand side. A new page is displayed.
6. A list of all current tasks will be displayed.
7. Click the **Edit Details** button. The page refreshes.



8. Click the **+ Add Tasks From Template** button. A new window is displayed.
9. In the **Templates to Apply** drop-down, select the relevant templates to apply.
10. Click **Save** to finish. The window closes and the tasks are distributed.

Add a new task template when adding a new job role

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details.**
3. Click **All Employees**. The **All Employees** page is displayed.
4. Select an employee from the employees listed.
5. Click the **Edit Details** button. The page refreshes.

6. Click **Select Job Role** by clicking on the **+** button on the left-hand side.
7. Complete all of the fields (see **Employees Guide > Adding a new job role** for more information).
8. In the **Starter Tasks** field, choose from the starter tasks listed.
9. Complete the rest of the details and click **+ Add Job Role**. The window closes.
10. Click **Save** to finish.

Trust Overview

Trusts can view **Tasks** across the entire trust via **Trust Overview**, both within the **Summary** and **All Tasks** sections. Tasks cannot be created within Trust Overview, instead create tasks within each individual property (school).

Summary (including Metrics)

The Summary section of the module provides a variety of metrics, including **All Tasks** and **All Completed Tasks**.

1. On the left-hand side of the EPM Connect window, select **Trust Overview**. A list of further menu options is displayed.
2. Select **Task Mgmt**. A list of further menu options is displayed.
3. Select **Summary**. The **Task Management** module is displayed and a variety of metrics and infographics visible.

To view more details, click the arrow in the top right corner of any of these metrics to move into specific details, including the tasks these relate to, or the users they were assigned to.

Scroll down to view further analytics, including tasks that have been assigned to you.

All Tasks (View, Edit and Manage Tasks)

Here you can view, edit and manage tasks. Mark tasks as complete, add a response and add any relevant documents.

View Tasks

1. On the left-hand side of the EPM Connect window, select **Task Management**. A list of further menu options is displayed.
2. Select **Task Mgmt**. A list of further menu options is displayed.
3. Select **All Tasks**. The **All Tasks** page is displayed and a variety of tabs displayed.
4. Select the relevant tab.
5. Click on the eye icon on the far right of the record or click on the **Title** to view the individual task. The **Task Details** are displayed.
6. Click the **Export** button to export the data, selecting from the drop-down either **Word** or **Excel** format. The file will appear in your downloads.

Edit a Task

1. On the left-hand side of the EPM Connect window, click **Task Management**. A list of further menu options is displayed.
2. Select **All Tasks**. The **All Tasks** page is displayed and a variety of tabs displayed.
3. Select the relevant tab.
4. Click on the eye icon on the far right of the task or click on the **Title** to view the individual task. The **Task Details** are displayed.

5. Click the **Edit Task** button and amend any relevant details.
6. To reassign the task, in the **Assign To** field, click the **x** next to the employee's name and type the name of a new employee and choose from the options displayed.
7. To assign the task to an additional employee, in the **Assign To** field, type the name of a new employee and choose from the options displayed.
8. Click **Save** to finish.

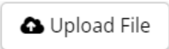
Any changes made to a task will be recorded within the **Audit Trail** of that task.

Mark a Task as Completed and Add a Response

1. From the **Status** drop-down, select **Completed**.

   This will move the task to **Completed Tasks** in the **Summary** page.

2. In the **Response** text box, add a response. This can be as simple as 'Task completed', or can include any notes.
3. In the **Upload File** field, click the **Upload File** button to upload any relevant documents.



Create a Reminder

1. Click the **+Reminder** button to add a reminder. A new window is displayed.
2. In the **Title** text box, enter a title.
3. In the **Description** text box, enter a description.
4. In the **Notify before Due Date** text box, enter the number of days' notice required.
5. From the drop-down menu, select **Days**, **Weeks** or **Months**.
6. Select either or both **Notify by Email** and **Notify by Popup**.
7. Click **Save** to finish.