Task Management Module

EPM Connect Guide



Document Control

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The Director of Operational Excellence shall review this guide annually and shall determine whether any further changes need to be made prior to approval.

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Task Management Module Guide

Our Task Management module brings it all together. Each module within 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 HR and administrative teams to manage starter and leaver tasks and 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 **Assigned 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**).

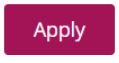
The columns within each tab indicate the **Title** of the task, who the task is **Assigned To**, **Assigned To User Groups** (any User Groups the task has been assigned to), the **Date Due** and who the task is **Related To**.

The system will automatically generate **Return To Work Forms** and **Self Certification**. This can be disabled by ticking the **Disable Return To Work** and **Disable Self Certification** box when adding a sickness absence.

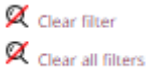
Please note that **Self Certification** forms can only be completed by employees within the **Enhanced Absence Management** module. **Core Absence Management** module users can only add **Self Certification** on behalf of the employee.

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, All Overdue 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.

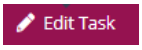
View Tasks

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. After clicking the eye icon to view the task, click the **Edit Task** button and amend any relevant details.

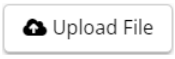
   

2. To reassign the task, in the **Assign To** field, click the **x** next to the employee's name and type the name of a new employee and choose from the options displayed.
3. To assign the task to an additional employee, click on **Assign To** field and select the user you wish to assign the task to.
4. Click **Save** to finish.

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** field, 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

Reminders are not mandatory but can be useful in encouraging employees to complete tasks.

1. Click the **+ Reminder** button to add a reminder. A new window is displayed.
2. In the **Title** field, enter a title.
3. In the **Description** field, enter a description.
4. In the **Notify before Due Date** field, 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 still send a reminder by creating a new reminder for the outstanding task

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

7. Click **Save** to finish.



Create and assign a task within Task Management

In addition to automated tasks generated by the system, the Task Management module allows you to create bespoke tasks for both individual users and user groups. Tasks can be created either within the task management section, or against an individual employee's job role.

There are a number of options available including:

1. Create and assign a task to **each and every Employee** for **each** employee to complete.
   Example: *A task for each employee to update Contact Details.*
2. Create and assign a task to a **single User Group** for **any** member of that group to complete.
   Example*: A task to set up a laptop for Bob Smith, assigned to IT Team.*
3. Create and assign a task to **multiple User Groups** for one member of **each** group to complete.
   Example*: A task for one member of both the IT and HR Team to meet with a new starter.*
4. Create and assign a task to **multiple User Groups** for **one** member from **any** group to complete.
   Example: A task for someone from either the SLT team or the HR team to review a document.
5. Create and assign a task for **each individual** to complete.
   Example: A task for the entire HR team, who must all attend Safer Recruitment training.
6. Create and assign a task for **any individual** to complete.
   Example: A task for either the COO or the CFO to complete a report.

The steps you must follow are dependent on whether it should be assigned to individual users or user groups and how many people need to complete the task. Please read and follow the steps carefully, as completing multiple fields, not included within the instruction can cause duplicate tasks, failure for the task to send at all or data breaches.

1. Create and assign a task to each and every Employee for each employee to complete

Example: *A task for each employee to update Contact Details.*

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** field, enter a title.
4. In the **Description** field, enter a description and include a URL as part of the description to link to external resources.
5. Always leave the **Assign To Bureau** tick box blank.
6. The **Assign To** field must be left blank.
7. The **Assign User Group** field must be left blank.
8. The **One or Many Tasks** tick box must be left blank.
9. Tick the **Assign To All Employees** tick box.
10. Leave the **Related To** field blank.
11. In the **Due Date** field, select a date from the calendar.

12. To upload a file, click the **Upload File** button and choose the file you wish to upload.

    This is not a mandatory step.

13. To create a reminder see the **Create a Reminder** section of this guide. If you do not wish to create a reminder, skip this step and click **Save**.

14. Click **Save**. You will return to the main screen.



2. Create and assign a task to a single User Group for any member of that group to complete

***Example**: A task to set up a laptop for Bob Smith, assigned to IT Team.*

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** field, enter a title.
4. In the **Description** field, enter a description and include a URL as part of the description to link to external resources.
5. Always leave the **Assign To Bureau** tick box blank.
6. Leave the **Assign To** field blank.
7. From the **Assign User Group** drop-down menu, select a single user group.
8. Leave the **One or Many Tasks** tick box blank.
9. Leave the **Assign To All Employees** tick box unticked.
10. In the **Related To** field, select the user that the task relates to.
11. In the **Due Date** field, select a date from the calendar.
12. To upload a file, click the **Upload File** button and choose the file you wish to upload.

    This is not a mandatory step.

13. To create a reminder see the **Create a Reminder** section of this guide. If you do not wish to create a reminder, skip this step and click **Save**.

14. Click **Save**. You will return to the main screen.



3. Create and assign a task to multiple User Groups for one member of each group to complete

***Example**: A task for one member of the IT and the HR Team to meet with a new starter.*

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** field, enter a title.
4. In the **Description** field, enter a description and include a URL as part of the description to link to external resources.
5. Always leave the **Assign To Bureau** tick box blank.
6. Leave the **Assign To** field blank.
7. From the **Assign User Group** drop-down menu, select all user groups that apply.
8. Tick the **One or Many Tasks** tick box.

   This will create one task for each **User Group** added. Once one user from each **User Group** completes the task, the task will be marked as complete.
9. Leave the **Assign To All Employees** tick box unticked.
10. In the **Related To** field, select the user that the task relates to.
11. In the **Due Date** field, select a date from the calendar.
12. To upload a file, click the **Upload File** button and choose the file you wish to upload.

    This is not a mandatory step.
13. To create a reminder see the **Create a Reminder** section of this guide. If you do not wish to create a reminder, skip this step and click **Save**.
14. Click **Save**. You will return to the main screen.



4. Create and assign a task to multiple User Groups for one member from any group to complete.

***Example**: A task for someone from either the SLT team or the HR team needs to review document.*

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** field, enter a title.
4. In the **Description** field, enter a description and include a URL as part of the description to link to external resources.
5. Always leave the **Assign To Bureau** tick box blank.
6. Leave the **Assign To** field blank.

7. From the **Assign User Group** drop-down menu, select all user groups that apply.
8. Leave the **One or Many Tasks** tick box blank.

   Once one user within any of the **User Groups** completes the task, the task will be marked as complete.
9. Leave the **Assign To All Employees** tick box unticked.
10. In the **Related To** field, select the user that the task relates to.
11. In the **Due Date** field, select a date from the calendar.
12. To upload a file, click the **Upload File** button and choose the file you wish to upload.

    This is not a mandatory step.
13. To create a reminder see the **Create a Reminder** section of this guide. If you do not wish to create a reminder, skip this step and click **Save**.
14. Click **Save**. You will return to the main screen.



5. Create and assign a task for each individual to complete

***Example**: A task for the entire HR team, who must all attend Safer Recruitment training.*

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** field, enter a title.
4. In the **Description** field, enter a description and include a URL as part of the description to link to external resources.
5. Always leave the **Assign To Bureau** tick box blank.
6. In the **Assign To** field, select the relevant users.

   OR to add multiple users within a User Group click the **Add** button.



   Tick the box next to the relevant user group.

   Click **Add Users**.



   Users can be removed by clicking on the **x** against their name after they have been added.
7. Leave the **Assign User Group** field blank.
8. Tick the **One or Many Tasks** box.

   Ticking this box will create a task where all Users are required to complete the task.
9. Leave the **Assign To All Employees** tick box unticked.
10. In the **Related To** field, select the user that the task relates to.

11. In the **Due Date** field, select a date from the calendar.
12. To upload a file, click the **Upload File** button and choose the file you wish to upload.

    This is not a mandatory step.
13. To create a reminder see the **Create a Reminder** section of this guide. If you do not wish to create a reminder, skip this step and click **Save**.
14. Click **Save**. You will return to the main screen.



6. Create and assign a task for any individual to complete

***Example**: A task for either the COO or the CFO to complete a report.*

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** field, enter a title.
4. In the **Description** field, enter a description and include a URL as part of the description to link to external resources.
5. Always leave the **Assign To Bureau** tick box blank.
6. In the **Assign To** field, select the relevant users.

   OR to add multiple users within a User Group click the **Add** button.



   Tick the box next to the relevant user group.

   Click **Add Users**.



   Users can be removed by clicking on the **x** against their name after they have been added.
7. Leave the **Assign User Group** field blank.
8. Leave the **One or Many Tasks** tick box blank.

   If the **One or Many Tasks** box is left blank, only one user is required to complete the task. Leave the **Assign To All Employees** tick box unticked.
9. In the **Related To** field, select the user that the task relates to.
10. In the **Due Date** field, select a date from the calendar.
11. To upload a file, click the **Upload File** button and choose the file you wish to upload.

    This is not a mandatory step.
12. To create a reminder see the **Create a Reminder** section of this guide. If you do not wish to create a reminder, skip this step and click **Save**.
13. Click **Save**. You will return to the main screen.



Create a Reminder

Reminders are not mandatory but can be useful in encouraging employees to complete tasks.

1. Click the **+ Reminder** button to add a reminder. A new window is displayed.
2. In the **Title** field, enter a title.
3. In the **Description** field, enter a description.
4. In the **Notify before Due Date** field, 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 individual Employee Record, particularly from a Task Template if the task relates to a starter or leaver.

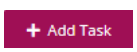
Add an individual task within an Employee Record

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. Scroll down and click the **Tasks** tab at the bottom of the page. The **Tasks** tab is displayed.
6. Click the **Edit Details** button. The page refreshes.



A list of all current tasks will be displayed.

7. Click **+ Add Task**. A new window opens.



8. In the **Task Title** field, enter a title.
9. In the **Description** field, enter a description and include a URL as part of the description to link to external resources.
10. Leave the **Assign To** field blank.
11. Leave the **Assign To User Group** field blank.

12. In the **Due Date From Start Date** field, select the number of days to complete the task. Alternatively, click on the blue **Or Select Date** link to choose an actual date from the calendar.
13. Leave the **One or Many Tasks** box blank.
14. Click the **+ Reminder** button to add a reminder. A new window is displayed.

    Reminders are not mandatory.
15. Select the **Reminder** tab and click the **+ Reminder** button.
16. In the **Title** field, enter a title.
17. In the **Description** field, enter a description.
18. In the **Notify before Due Date** field, enter the number of days' notice required.

    This defaults to **Days** but can be amended to **Weeks** or **Months**.
19. From the drop-down indicating **Days** select the option you require.
20. Select either or both **Notify by Email** and **Notify by Popup**.
21. Click **Save** to finish. You will return to the original screen.

22. 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 to specific user groups, or individuals in relation to a specific employee. For example, to your IT Team in relation to employee set up or your HR Team in relation to an employee induction. Task Templates are managed within the **Employees** module, in **Settings**.

Once created, **Task Templates** are applied to individuals when adding their roles or from within the **Starter Task** field within an **Employee's Record**.

For example, if a Task Template has been created for the HR Team or a specific individual to send an employee a leaver questionnaire, when the Task Template is assigned to the employee, a task will be sent to the HR Team or individual user to complete that task in relation to that particular employee.

No task will be sent to the employee themselves.

Task Templates should be used for tasks that are consistently applied and created in the same manor.

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 **Task** tab is displayed first.

Create a task

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

1. Click **Create Task**. The **Add Task** page is displayed.
2. In the **Task Title** field, enter a title.
3. In the **Description** field, 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.

Tasks within Task Templates can be assigned to either individual Users or to User Groups. How you complete the **Assign To**, **Assign User Group** and **One or Many Tasks** fields are dependent on the type of task you wish to create. The steps you must follow are dependent on whether it should be assigned to individual users or user groups and how many people need to complete the task. Please read and follow the steps carefully, as completing multiple fields, not included within the instruction can cause duplicate tasks, failure for the task to send at all or data breaches.

Option 1. Create and assign a task to a single User Group for any member of that group to complete

Example: A task to set up a laptop for Bob Smith, assigned to IT Team.

1. Leave the **Assign To** field blank.
2. From the **Assign User Group** drop-down menu, select a single user group.
3. Leave the **One or Many Tasks** tick box blank.
4. To create a reminder see the **Create a Reminder** section of this guide. If you do not wish to create a reminder, skip this step and click **Save**.
5. Click **Save**. You will return to the main screen.



Option 2: Create and assign a task to multiple User Groups for one member of each group to complete

***Example**: A task for one member of both the IT and HR Team to meet with a new starter.*

1. Leave the **Assign To** field blank.
2. From the **Assign User Group** drop-down menu, select all user groups that apply.
3. Tick the **One or Many Tasks** tick box.

   This will create one task for each **User Group** added. Once one user from each **User Group** completes the task, the task will be marked as complete.
4. To create a reminder see the **Create a Reminder** section of this guide. If you do not wish to create a reminder, skip this step and click **Save**.
5. Click **Save**. You will return to the main screen.



Option 3: Create and assign a task to multiple User Groups for one member from any group to complete

Example: A task for someone from either the SLT team or HR team to review document.

1. Leave the **Assign To** field blank.
2. From the **Assign User Group** drop-down menu, select all user groups that apply.
3. Leave the **One or Many Tasks** tick box blank.

   Once one user within any of the **User Groups** completes the task, the task will be marked as complete.
4. To create a reminder see the **Create a Reminder** section of this guide. If you do not wish to create a reminder, skip this step and click **Save**.
5. Click **Save**. You will return to the main screen.



Option 4: Create and assign a task for any individual to complete.

Example: A task for either the COO or the CFO to complete a report.

1. In the **Assign To** field, select the relevant users.
2. Leave the **Assign User Group** field blank.
3. Leave the **One or Many Tasks** tick box blank.

   If the **One or Many Tasks** box is left blank, only one user is required to complete the task. Leave the **Assign To All Employees** tick box unticked.

4. To create a reminder see the **Create a Reminder** section of this guide. If you do not wish to create a reminder, skip this step and click **Save**.
5. Click **Save**. You will return to the main screen.



Create a Reminder

1. Click the **+ Reminder** button to add a reminder. A new window is displayed.
2. In the **Title** field, enter a title.
3. In the **Description** field, enter a description.
4. In the **Notify before Due Date** field, 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 **Template** tab. The tab information is displayed.
2. Click **Create Template**. A new **Manage Template** window is displayed.
3. In the **Title** field, 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 preset Task Template to an employee from the Employee Record

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, in **Settings**. 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. See Create Task Templates to create and view **Task Templates**.

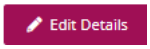
Once created, **Task Templates** are applied to individuals when adding their roles or from within the **Starter Task** field within an **Employee's Record**.

For example, if a **Task Template** has been created for the HR Team or a specific individual to send an employee a leaver questionnaire, when the **Task Template** is assigned to the employee, a task will be sent to the HR Team or individual user to complete that task in relation to that particular employee.

No task will be sent to the employee themselves.

Task Templates should be used for tasks that are consistently applied and created in the same manor.

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. Scroll down and click the **Tasks** tab at the bottom of the page. The **Tasks** tab is displayed.
6. Click the **Edit Details** button. The page refreshes.



A list of all current tasks will be displayed.

7. Click the **Add Tasks From Template** button.



8. Select the relevant Task Template from the **Templates to Apply** drop-down menu.
9. Click **Save**. The window closes.



10. Click **Save**. The task will be sent to the employee.

Assign Starter Tasks 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.

   For example, if a **Task Template** has been created for the HR Team or a specific individual to send an employee a leaver questionnaire, when the **Task Template** is assigned to the employee, a task will be sent to the HR Team or individual user to complete that task in relation to that particular employee.

   No task will be sent to the employee themselves.

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.

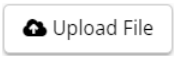


Any changes made to a task will be recorded within the **Audit Trail** of that task.

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** field, 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** field, enter a title.
3. In the **Description** field, enter a description.
4. In the **Notify before Due Date** field, 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.

