

## Task Manager

With the 7.2.0 release of mymicros.net, a new feature, Task Manager, has been implemented that will provide an easier method of handling daily tasks in myinventory. Task Manager will allow organizations to set up daily Tasks, such as Ordering, Inventory, or Production, to occur at specified frequencies. Managers who are to complete these tasks will be assigned the Task Menu. When the Managers log into myinventory, they will be presented with the Tasks to be completed that day. This will provide an easier and more controlled workflow, as Managers will know exactly what needs to be done each day.

Task Manager consists of two elements: the Task Management module and the Task Menu. Tasks will be created in the Task Management module, and will be available to be completed by those Users assigned to use the Task Menu.

## Settings

To access Task Manager, navigate to Maintenance | Settings | General tab and select 'Enable Task Manager'.

A field will be displayed to allow the Organization to set the 'Start of Calendar Week.' Previously, it was only possible to configure this setting in the Configuration module, under Maintenance | Configuration | INTERNATIONAL | STARTDOW\_OFFSET. The number set in this field indicates the day of the week which will appear first in calendar selections. Previously, the Configuration option could be set to <null>, and the system would use the value set in the PC's Region and Location Settings. During the 7.2.0 upgrade process, any Organization without a Start Day of Week detected will be set to Monday. Organizations may change this setting, if desired, in the Settings module.

## Task Management Module

The Task Management module can be found under Maintenance, and requires Role/User Rights to access and create/edit Tasks. Navigate to Maintenance | Roles/User Management | Role/User Detail | Manage Rights | System | Task Management and enable 'Task Management' to view the module and 'Save Task' to create/edit Tasks.

The Task Management Overview screen is displayed when first accessing the module. Filters are available to minimize the result set to specific Task Types, i.e. Order, Receipt, Inventory, Production. Tasks may also be filtered by the Cost Center they are assigned to.

To create a new Task, select 'Create Task' from the Top Menu Bar; the Create Task Webpage Dialog will be displayed. Enter a name for the Task in the Task Name field, (up to 60 alphanumeric characters are supported). This is how the Task will be distinguished throughout Task Manager. Select the Task Type, i.e. Order, Receipt, Inventory, and Task Method. The Task Method is how the Task will be performed. Options available will depend on the chosen Task Type. Enter a Note, if desired, (up to 110 alphanumeric characters are supported). Notes will be displayed with the Task in the Task Menu. Select OK; a new screen will be presented in which more specific options may be configured.

The Task Management Detail screen will vary, depending on the Task Type that was chosen. Two settings will be consistent in all Types: Due By and Frequency selection. Due By is the time the Task should be completed by, and is optional. This time will be displayed next to the Task in the Task Menu. Tasks not completed by their Due By time will be displayed in red to let the User know that it needs attention, and remain red after the Task has been completed. Task Frequency determines how often/when this Task will be scheduled.

- Daily/Weekly: If selected, options for Mon – Sun selections will be available. All, some or none of the days may be selected. The Task will be scheduled to occur on the day(s) specified.
- Monthly: If selected, the User may choose between Calendar End or Date. If Calendar End is selected, the Task will be scheduled on the last day of the month. If Date is selected, the User must specify the day of the month that the Task should occur in the Date field. The entry must be a number from 1-31.
- Interval: If selected, the User must specify a Start and End Date for the Task, and then enter how often, in days, the Task should be scheduled in the Every \_\_\_ Days field.

**Note: If a value is defined in any of the configurable Frequency fields, and the User selects a different Frequency type, the previous Frequency will be disabled; however, the value will remain visible in the disabled field. This way, if the User decides to change back to the original Frequency method, the previous definition will be retained.**

## **Task Types and Methods - Configuration Options**

Depending on the Task Type and Method selected, configuration options will vary for each Task. The following describes the Task Types and Methods, and what information is required for each.

- Order by List/Master Order List: The User is required to select a Cost Center and an Order/Master Order List; Orders created by this Task will use Items assigned to the specified List.

- Order by Vendor/Suggested Order by Vendor: The User must select a Cost Center. A Vendor field will be available. Once a Vendor is chosen, Item Groups will be displayed that may be assigned to that Task. A Vendor and at least one assigned Item Group are required for this Task.
- Receipt with Existing Purchase Order: The User must select a Cost Center. When this Task is selected from the Task Menu, the User will be taken to the Receiving module to choose an existing Purchase Order.

Receipt by List: The User is required to select a Cost Center and a Receiving List; Receipts created by this Task will use Items assigned to the specified List.

- Receipt by Vendor: The User must select a Cost Center. A Vendor field will be available. Once a Vendor is chosen, Item Groups will be displayed that may be assigned to that Task. A Vendor and at least one assigned Item Group are required for this Task.

B2B Solution: No additional configuration is necessary, outside of selecting a Frequency. When this Task is selected from the Task Menu, the User will be taken to the B2B Solutions module, where they may import Item Catalogs, check Price Variances, or complete any other required maintenance for the Organization's B2B Vendors.

- Invoice: No additional configuration is necessary, outside of selecting a Frequency. When this Task is selected from the Task Menu, the User will be taken to the Invoicing module where Receipts may be selected and assigned to an Invoice.
- Transfer From/To Using List: The User must select a From and a To Cost Center, and then choose a Transfer List from the List field.
- Inventory (Blank): The User must select a Cost Center and assign one or more Item Groups. Inventory Time, Closing Method, and Unit Collection Method are preselected fields that may be changed by the User if desired.

- Inventory by List: The User must select a Cost Center and an Inventory List. Inventory Time, Closing Method, and Unit Collection Method are preselected fields that may be changed by the User if desired.
- Inventory by Count Cycle: Cost Center and a Count Cycle are required fields. The User must ensure that the Frequency configured in Task Management coincides with the Frequency configured for the Count Cycle. Otherwise, the Count Cycle will not appear as a Task on the correct day. Unit Collection Method is preselected but may be changed by the User if desired.
- Production (by List): The User must select a Cost Center and a Production List; Production documents created by this Task will use Items assigned to the specified List.
- Waste (by List): The User must select a Cost Center and a Waste List; Waste documents created by this Task will use Items assigned to the specified List.
- Prep and Thaw Pull: The User must select a Cost Center. When this Task is selected from the Task Menu, the User will be taken to the Preparation and Thaw Pull module.
- Inventory Daily Variance: The User must select a Cost Center. When this Task is selected from the Task Menu, the User will be taken to the Inventory Daily Variance page.

## **Task Menu**

An option has been introduced to indicate which Roles/Users should be operating under the Task Menu. If 'Use Task Menu' is enabled in Maintenance | Roles/User Management | Role/User Detail, those Roles/Users will see the Task Menu, which displays the Tasks due for that day, when they first log into myinventory each day.

## **Task Menu Filters**

The date selector allows the User to move to the previous or next day by using the arrows on the left and right, respectively. Clicking the date dropdown will open a calendar, in which the User may select a past or future date. The screen will automatically refresh when a new date is selected with the Tasks assigned for that day.

Several filters are available to narrow the result set of the Task Menu. 'Include Completed Tasks' allows the User to choose whether or not to include Tasks that have already been completed for the day. Tasks may be filtered by their type in the Task Type dropdown. The Cost Center filter will allow the User to view the Tasks for any Cost Center within their C/S filter. When a new Cost Center is selected, the screen will automatically refresh to display the new information. A Location may be selected, as well, which will display Tasks for all Cost Centers assigned to that Location.

The User may navigate to the Main Menu by selecting 'Full Menu' from the bottom right corner of the Task Menu screen. When using the Main Menu, an option to return to the Task Menu will be available in the Top Menu Bar of the Classic Menu or in the bottom right corner of the Collapse Menu.

## **Task Organization**

Tasks with a Due By specified will be listed first in the Task Menu, in Due By order as they are time sensitive in nature. The second sort priority is the Task Type and then the Task Name. Tasks without a Due By will sort to the bottom of the result set. The Task Type will be displayed in the next column, as well as the Cost Center associated with the Task. In the case of a Transfer Task, the From Cost Center will be displayed in this column. If a Due By time or Note was specified during the creation of the Task, they will be displayed in the menu, as well. If a Task has not been completed by its Due By time, the Task name and Due By time will be displayed in red. If privileged to do so, (Maintenance | Role/User Management | Manage Rights | System | Task Menu | Change Status), a Task may be cancelled by clicking the waste bin in the Cancel Task column. The User must enter a Reason Code for the cancellation, which is displayed in a printed Task List. Tasks that are in progress may not be cancelled, as they have a document associated with them. To cancel a Task in progress, the document must first be cancelled in the Task Type's module, which will set this Task's status back to Not Started. Then it may be cancelled by clicking on the waste bin.

Icons will be displayed to the left of the Task name to let the User know what the status of each Task is. If no icon is visible, the Task has not yet been started. The pencil indicates that the Task is in progress, and the green check indicates the Task has been completed. If a Task was cancelled, a red X will appear next to the Task name. This Task may be reinstated by clicking the X and selecting OK when the confirmation message “Are you sure you want to reinstated the task?” is displayed.

## **Executing a Task**

Selecting a Task from Task Menu will launch a detail screen or PDF rendering (usually for Booked Documents) associated with the chosen Task. For example, if the Task is an Ordering Task for which no Document has been created, the system will create an Order using the header information (e.g., Cost Center, Vendor, List or Item Group(s)) defined in the selected Task. Any header information that is not defined in the Task (such as the Delivery Date and 2nd Delivery Date if a Suggested Quantity Order) will use the default values which may then be edited in the transaction. If there is information that is not defined in the Task, is required, and for which there is no default value, a Webpage Dialog will be presented prompting for that information. An example of this can be seen in Receiving, where the following fields are required but not defined in the Task:

Delivery Note No. – User entry required if not autogenerated

Invoice Total – User entry required if configured

Delivery Date – has default value

The system will apply as many default values to the header as are available. If all requirements are met, then no prompting of the User is needed. E.g. If the Receipt number is configured to be autogenerated and the Delivery Date has a default value, no prompting for further information is required and the system will bypass the Create Receipt – Webpage Dialog and deliver the User directly to the Receipt Detail page when such a Task is selected. If, however, the Vendor associated with the Receiving Task prompts for an Invoice Total (a required field for which there is no default value) or the Receipt number is not set for autogeneration, a Create Receipt – Webpage Dialog will be presented for the User to fill in the additional required information.

**Note: When using Receipt by List, if the List has more than one Vendor included, the system will prompt the User to choose a Vendor for the Receipt before proceeding to Receiving Detail.**

If the User selects a Task from the Task Menu for which there is already a document (generated through Task Menu), that document will be summoned similarly as it would if it was selected from View Suspended Documents. If the chosen Task is already completed, either a PDF rendering of the document is summoned or the detail screen of the transaction (depending upon document type) similarly as if selected from View Booked Documents.

Once in the Detail screen, the User may complete the Task, usually by booking the document, as they would if doing so from the regular menu. When accessing a document from the Task Menu, any navigation away from the document will return the User to the Task Menu. Specifically, selecting Suspend will save the document and open the Task Menu, selecting Main Menu or Cancel will abandon changes and open the Task Menu, and Book will book the document, generate a PDF of the finalized document, and return the User to the Task Menu.

When the document is Booked, the Task will be marked as Complete in the Task Menu. For some Tasks, however, the User must manually choose to complete the Task. These Tasks will have a 'Complete Task' option in the Top Menu Bar of the page. When selected, the User will be prompted with a confirmation message stating "Are you sure you want to complete the Task?" Selecting OK will mark the Task as complete in the Task Menu. These modules also have a Return option in the Top Menu Bar that will navigate the User back to the Task Menu without completing the Task. The Tasks that must be manually marked as completed are:

- Preparation and Thaw Pull
- B2B Solutions
- Inventory Daily Variance
- Receiving by existing Purchase Order

## **Print Task Menu**

A Task List may be printed by selecting Print Task Menu from the lower right corner of the Task Menu; a Webpage Dialog will be displayed so the User may specify Cost Center and the date(s).

The User will have the ability to indicate via radio buttons whether a Daily Task List or Weekly Task List will be printed. The Location/Cost Center will default to the User's default Cost Center, and the drop down date field will allow the User to select a date. When Daily is selected, the Date field will default to the current date. It will be possible to print a Task List for previous and future dates. The calendar in the Date field will allow selection of any Date up to 30 days prior to the current day. The User will be unable to select a day prior to 30 days. There will be no limit on how far in to the future a Task List may be generated.

If Weekly is selected, the Date: title over the calendar will change to Week Beginning. The value displayed in the date field will be the start of the current Business Week as defined in Maintenance | Settings | General | Start of Calendar Week. For example, if the Start of Calendar Week is set to Sunday and the current date is Wednesday, 12/14/2011, 12/11/2011 will display in the date field. Highlighting a date in the calendar will automatically select the beginning of a

business week corresponding to the day selected. For example, if the Start of Calendar Week is set to Sunday and the current day is Wednesday, 12/14/2011 and the User clicks on Thursday, 12/15/2011, the Calendar will automatically highlight the 12/11/2011.

The Task List will include all of the Tasks for the chosen date(s); if a week was selected, the Tasks will be divided by day.

The Task List will include information that is not displayed in the Task Menu, such as Reason (for cancelled Tasks), Document name, and Document Status.

**Note: Task Types, Cost Center, and Vendor selection will still be reliant on User Rights, the User's Cost Center filter, Visibility Criteria, and Cost Center Areas. If a Role/User is not privileged to perform an action in the Main myinventory Menu, the action will also be restricted throughout Task Manager.**