

The Assigned Task List

CurrentTrack® generates an Assigned Task List, for each Employee, that reflects Tasks entered in Workback Schedules or “project timelines.” Refer to your List throughout the day, especially when logging in first thing in the morning.

To view your Assigned Task List, go to *Status & Tasks*, under Main Folders. You can also click either the Normal or Overdue Tasks links (figure 1).

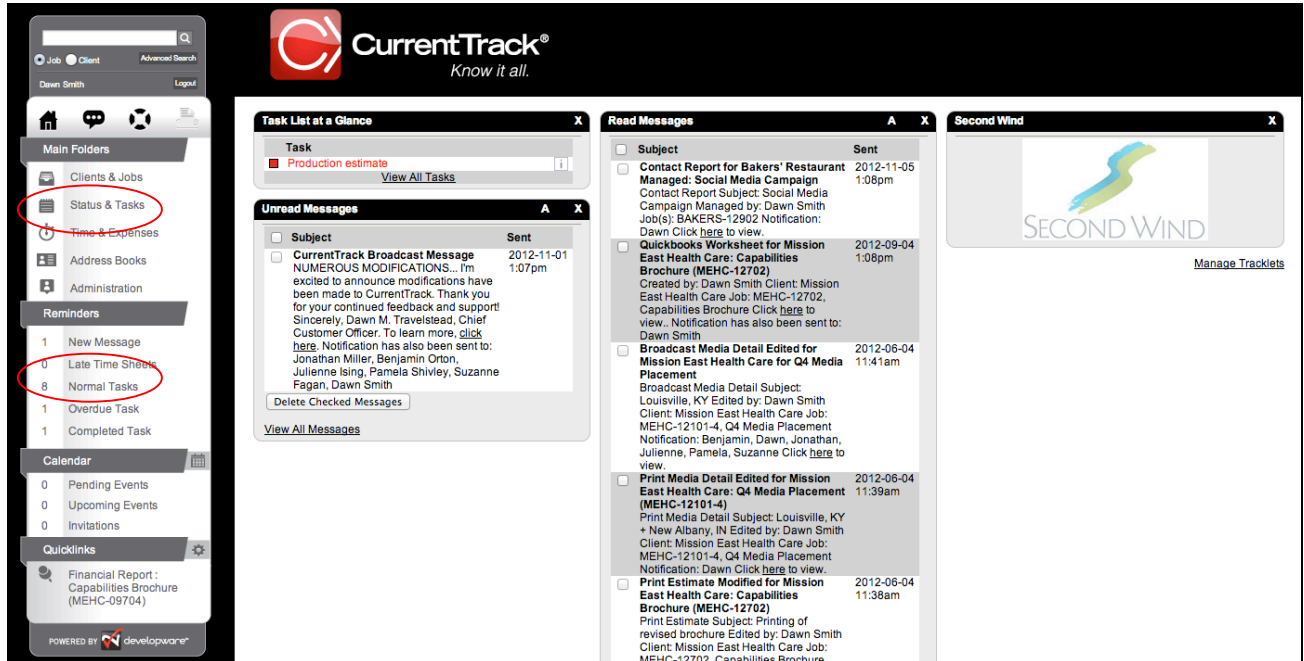


Figure 1

By default, your List includes all Tasks that are Overdue, Due today and Due out by 30 days. The Due dates of overdue Tasks are displayed in red while those Due today are bold (figure 2).

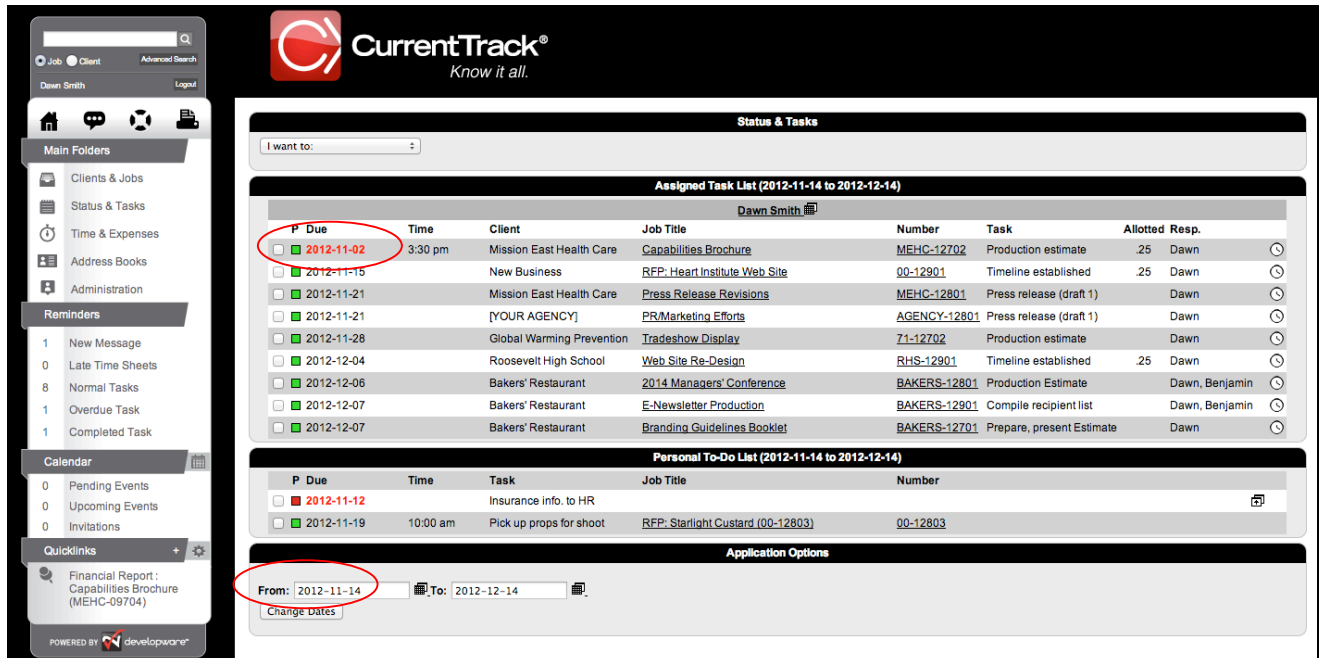


Figure 2

To modify the displayed date range, enter alternate dates From and To, under Application Options (figure 2). Overdue Tasks, regardless of where they fall in the range, will always be displayed. The Priority level of a Task is indicated by either a red (“high”), green (“normal”) or yellow (“low”) box, immediately to the left of its Due date (figure 3). The Time it’s due, if applicable, is also displayed.

CurrentTrack®
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Status & Tasks

I want to: [dropdown]

Assigned Task List (2012-11-14 to 2012-12-14)

P	Due	Time	Client	Job Title	Number	Task	Allotted	Resp.
■	2012-11-02	3:30 pm	Mission East Health Care	Capabilities Brochure	MEHC-12702	Production estimate	25	Dawn
■	2012-11-15		New Business	RFP: Heart Institute Web Site	00-12901	Timeline established	25	Dawn
■	2012-11-21		Mission East Health Care	Press Release Revisions	MEHC-12801	Press release (draft 1)		Dawn
■	2012-11-21		[YOUR AGENCY]	PR/Marketing Efforts	AGENCY-12801	Press release (draft 1)		Dawn
■	2012-11-28		Global Warming Prevention	Tradeshow Display	71-12702	Production estimate		Dawn
■	2012-12-04		Roosevelt High School	Web Site Re-Design	RHS-12901	Timeline established	25	Dawn
■	2012-12-06		Bakers' Restaurant	2014 Managers' Conference	BAKERS-12801	Production Estimate		Dawn, Benjamin
■	2012-12-07		Bakers' Restaurant	E-Newsletter Production	BAKERS-12901	Compile recipient list		Dawn, Benjamin
■	2012-12-07		Bakers' Restaurant	Branding Guidelines Booklet	BAKERS-12701	Prepare, present Estimate		Dawn

Personal To-Do List (2012-11-14 to 2012-12-14)

P	Due	Time	Task	Job Title	Number
■	2012-11-12		Insurance info. to HR		
■	2012-11-19	10:00 am	Pick up props for shoot	RFP: Starlight Custard (00-12803)	00-12803

Application Options

From: 2012-11-14 To: 2012-12-14

Change Dates

Figure 3

Information regarding preceding Tasks, and those forthcoming, can be found by clicking either the Job Title or Number link(s)(figure 4). A separate window or tab will open, depending on your browser settings.

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Figure 4

The Task column includes all steps, labeled “Working,” for which you’re Responsible (figure 5). If additional Employees are Responsible, the Tasks will also appear on their Lists. The time Allotted for the Task (if applicable) will appear to its right. If Comments have been associated with it, a pop-up box will be displayed to its right.

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Figure 5

To mark an item on your Assigned Task List complete, click the corresponding box to the left of its Due date (figure 6). You'll then be prompted to add a Comment (e.g. "The layout is routing."); click OK.

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Figure 6

Once you've marked a Task complete, notification will be sent to the Reminders box of your System Administrator(s). The Completed Tasks link (figure 6), will lead her to a list of all Tasks that have been checked off by Employees. From there, she can read comments and take further action. A complete Task will remain on your List until your Administrator(s) modifies its Workback Schedule (or determines it's incomplete). If incomplete, the Task will again appear, without a strikethrough, on your List.

A complete Task doesn't directly affect a job's Schedule for a number of reasons. By requiring an Administrator(s) to confirm work is complete, further revisions can be avoided. To view the Printer Friendly version of your Assigned Task List, click the printer icon (figure 6).

To record time from within your Assigned Task List, simply click the clock icon(s)(figure 7).

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Figure 7

Within the pop-up box, select a Work Code (figure 8). A Work Code Key appears at the bottom for your reference. The name of the Task will automatically appear in the Description field and can be modified. Enter an optional Time Memo (e.g. 8-9 a.m.) and the number of Hours worked; click Submit. Details will automatically appear in your overall Time Sheet, accessible via Time & Expenses.

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Record Time

Job: Capabilities Brochure (MEHC-12702)

Work Code: [dropdown menu]

Description: Production estimate

Time Memo: [text field]

Allotted Time: .25

Hours: [text field]

Submit

Work Code Key

Code	Name	Code	Name
A	Administration	M	Media
AS	Account Service	N	Non-billable Time
C	Creative	S/P	Sick or Personal Time
D	Digital	V	Vacation Time

Figure 8