Assign and Resolve Tasks

1 Admin: Enable the Tasks Feature

2 Admin: Configure the Notification Settings

3 Admin and Users: Add Tasks

4 Admin and Users: View Tasks

5 Admin and Users: View Task History

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Main Dashboard

In this click-thru, you will learn how to create and view tasks on the My Tasks screen.

Click the numbered circles on the left to move to the first step in each phase.

Use the arrows or Pg Up/Down keys to proceed through each step and sub-step.

Begin

Best viewed in IE or Adobe PDF Reader.

Assign and Resolve Tasks

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Administration / Global Settings / System Administration / Features

Features

Groups

A Click Administration > Global Settings > System Administration > Features.

SELECT A GROUP *

Employee ▾

B Make sure that **Tasks** is enabled for all the groups to whom you want to have tasks issued.

☑ Core 🌐

▾   FILTER   tasks

☑ **Tasks**
This feature allows users to create and modify tasks and assign given tasks to specific stakeholders.

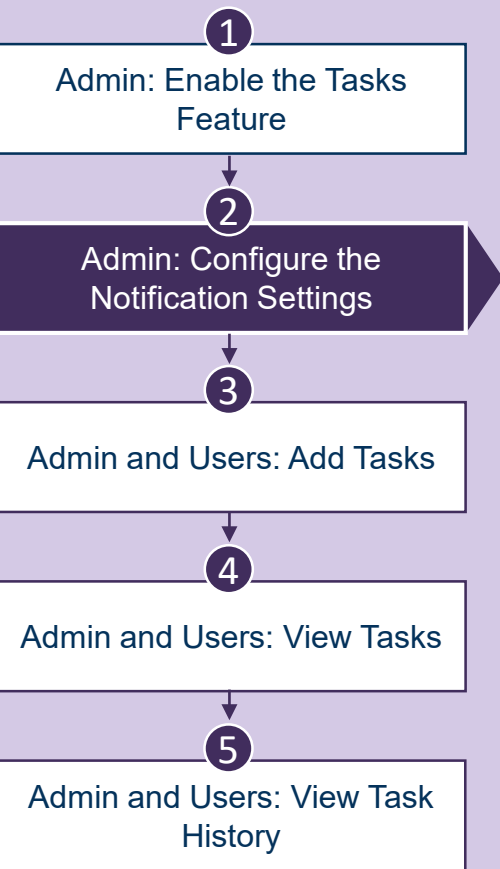☑ Recruiting

☑ Performance

☑ Development

☑ Learning

☐ CoreHR

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Administration / Global Settings / System Administration / **Features**

Administration

Recruiting

Configuration	Vendors
Application Restriction Rules	Accounts
Diversity Data Collection	Charge Codes
Dynamic Forms	Distribution Lists
External Front Ends	Locations
Kiosks	**Employee Referral Program**
Teams	Approve Earned Awards
Terms of Use	Pay Installments
Workflows	

On

We

Tas

Doc
Bundles
Recipients

Resumes
Résumé Deletions

Cross-Posting
Accounts
Authorization Requests
Site Selection

Benefits
Benefit Packages
Benefits

Development

Career Path Templates
Potential Rating Tips

Succession Planning

Manage Succession Plans
Configure 9 Box

Click Administration > Global Settings > System Administration > Features.

A

Global Settings

System Administration	Your Organization
Custom Menus	Approval Chains
Drop-down and Multi-Select Lists	Competencies
FAQs	Documents
Features	Job Families
Groups	Job Profiles
Languages	Location Groups
Notification Events	Locations
Page Options	Organizational Structure
System Settings	Scales
	Skills
	Users
	View Off-Boarded Users

Performance

Appraisals	360s

Assign and Resolve Tasks

1 Admin: Enable the Tasks Feature

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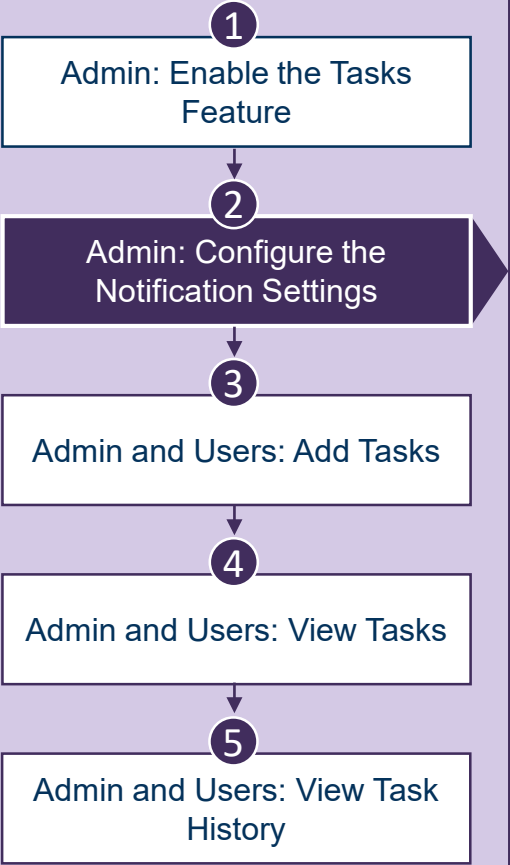
ˇ Onboarding

ˇ Project Team

ˇ Requisitions

ˇ Résumés

ˇ Succession Planning

> **B** The following options are enabled by default. Disable if necessary, or click the View icon to configure notification settings.

ˇ Tasks

☑ Task Activity 🔗
This notification is sent to stakeholders whenever there is a change in the task that is assigned to them.
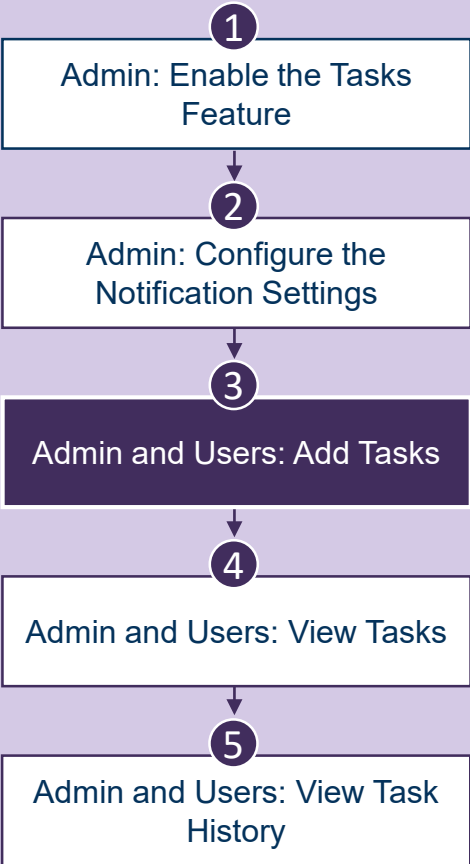
☑ Task Reminder 🔗
This event is to remind stakeholders of tasks that need completion.

ˇ Training Wish List

ˇ Tuition Assistance Administration

ˇ Vendors

Assign and Resolve Tasks

```
┌─────────────────────────┐
│  ①                      │
│  Admin: Enable the Tasks │
│  Feature                │
└─────────────────────────┘
            │
            ▼
┌─────────────────────────┐
│  ②                      │
│  Admin: Configure the   │
│  Notification Settings  │
└─────────────────────────┘
            │
            ▼
┌─────────────────────────┐
│  ③                      │
│  Admin and Users: Add Tasks │ ▶
└─────────────────────────┘
            │
            ▼
┌─────────────────────────┐
│  ④                      │
│  Admin and Users: View Tasks │
└─────────────────────────┘
            │
            ▼
┌─────────────────────────┐
│  ⑤                      │
│  Admin and Users: View Task │
│  History                │
└─────────────────────────┘
```

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Dashboard

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Main Dashboard

Get More Widgets | **Tasks**

A

From the Main Dashboard, click Tasks

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Alerts
- New Tuition Assistance Requests (10)
- Score this Appraisal - Appraisal (Mars WF Easy LALA) Mars Admin

Show All

v16.1.0
Last sync:

Users associated with a Task are referred to as "Stakeholders". As a stakeholder, you will either be:

- An Assignee, or the individual responsible for completing the task;
- A Principal, or the individual who needs to ensure that the task is done; or
- A Follower, someone who has an interest in seeing the task finished, but is not responsible for completing it.

Assign and Resolve Tasks

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My Tasks

Add Task

B

Click Add Task.

▼ Filter

STATUS
Incomplete

CATEGORY
Personal

CLEAR FILTER
Click Here

« ‹ 1 › »

Displaying 1 - 2 of 2   10 25 50 100 per page

DESCRIPTION ⌄	REQUIRED ⌄	CATEGORY ⌄	DUE DATE ⌄	DATE CREATED ⌄	ROLE ⌄	PRINCIPAL(S)	ASSIGNEE(S)	STATUS ⌄	ACTIONS
Hello there	Yes	Personal	6/23/2019	6/19/2019	Principal	Admin HRsmart	Sammie Spam Epepito Administrator Kathryn Admin	Incomplete	⬈ ↺ ⋮
This is a test task	Yes	Personal	6/21/2019	6/17/2019	Principal	Admin HRsmart Rosa 360	Rose 360	Incomplete	⬈ ↺ ⋮

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Last sync:

Assign and Resolve Tasks

1 Admin: Enable the Tasks Feature

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4 Admin and Users: View Tasks

5 Admin and Users: View Task History

Add Task

DESCRIPTION *

| B | I | U | | | | |

DUE DATE

STATUS *

Incomplete ▼

IS REQUIRED ☐

IS PRIVATE ☐

IS GROUP ☐

STAKEHOLDERS:

FULLNAME	STAKEHOLDER ROLE	MUTE REMINDERS	ACTIONS
Admin HRamart	Principal ▼	No	✕
Sammie Spam	Assignee ▼	No	✕
Epepito Administrator	Assignee ▼	No	✕
Kathryn Admin	Assignee ▼	No	✕

ADD MORE STAKEHOLDERS

👤 Add More Stakeholders

C Fill in the required fields.

As the creator of a new Task, you are always set to **Principal Stakeholder** by default. Your direct reports are automatically added as **Assignees**.

Remove Assignees if necessary.

D

E Add more Stakeholders if necessary. Then click **Save**.

Assign and Resolve Tasks

1 Admin: Enable the Tasks Feature

↓

2 Admin: Configure the Notification Settings

↓

3 Admin and Users: Add Tasks

↓

4 Admin and Users: View Tasks

↓

5 Admin and Users: View Task History

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My Tasks

Add Task

▼ Filter

STATUS
Incomplete

CATEGORY
Personal

CLEAR FILTER
Click Here

When logged in as a Principal Stakeholder of a task, you can **View** tasks, view the **Task History**, **Edit** tasks to add more Assignees, **Mute Reminders**, **Complete** tasks, and **Cancel** them.

When logged in as an Assignee, you can **Complete** tasks, **View** tasks, and **View Task History**. You will not be able to **Edit** or **Cancel** tasks, as well as **Mute** reminders.

When logged in as a Follower, your options are to **View** the task and the **Task History**, **Mute Reminders**, and **Unfollow** the task.

« ‹ **1** › »

Displaying 1 - 2 of 2 10 | **25** | 50 | 100 per page

DESCRIPTION ⌄	REQUIRED ⌄	CATEGORY ⌄	DUE DATE ⌄	DATE CREATED ⌄	ROLE ⌄	PRINCIPAL(S)	ASSIGNEE(S)	STATUS ⌄	ACTIONS
Hello there	Yes	Personal	6/23/2019	6/19/2019	Principal	Admin HRsmart	Sammie Spam Epepito Administrator Kathryn Admin	Incomplete	📝 🕘 ⋮
This is a test task	Yes	Personal	6/21/2019	6/17/2019	Principal	Admin HRsmart Rosa 360	Rose 360		

✏️ Edit
🔇 Mute Reminders
✔ Complete
◼ Cancel

A Click to view the task details.

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Last sync:

Assign and Resolve Tasks

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View Task

My Tasks

> Task actions are also available on the View Tasks screen.

DESCRIPTION
This is a test task

DUE DATE
6/21/2019

STATUS
Incomplete

IS REQUIRED
Yes

IS PRIVATE
No

IS GROUP
No

STATUS LAST CHANGED BY
Admin HRsmart

CATEGORY
Personal

STAKEHOLDERS

FULLNAME	STAKEHOLDER ROLE	MUTE REMINDERS	ACTIONS
Admin HRsmart	Principal	No	✕
Rosa 360	Principal	No	✕
Rosi 360	Follower	No	✕
Rose 360	Assignee	No	✕

ADD MORE STAKEHOLDERS

👤 Add More Stakeholders

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> You can also add or remove Stakeholders from this screen.

Assign and Resolve Tasks

1
Admin: Enable the Tasks Feature

2
Admin: Configure the Notification Settings

3
Admin and Users: Add Tasks

4
Admin and Users: View Tasks

5
Admin and Users: View Task History

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My Tasks

Add Task

▼ Filter

STATUS
Incomplete

CATEGORY
Personal

CLEAR FILTER
Click Here

Click to view the collection of all changes made to the Task. That includes updates to the Status as well as changes to the Stakeholder listing.

A

« ‹ 1 › »

Displaying 1 - 2 of 2   10 **25** 50 100 per page

DESCRIPTION ▾	REQUIRED ▾	CATEGORY ▾	DUE DATE ▾	DATE CREATED ▾	ROLE ▾	PRINCIPAL(S)	ASSIGNEE(S)	STATUS ▾	ACTIONS
Hello there	Yes	Personal	6/23/2019	6/19/2019	Principal	Admin HRsmart	Sammie Spam Epepito Administrator Kathryn Admin	Incomplete	⬈ ↺ History ⋮
This is a test task	Yes	Personal	6/21/2019	6/17/2019	Principal	Admin HRsmart Rosa 360	Rose 360	Incomplete	⬈ ↺ ⋮

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https://docenhancement.awsqa.hua.hrsmart.com/hr/hua/Task/index#

Assign and Resolve Tasks

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History

History

« ‹ **1** › »

Displaying 1 - 8 of 8 | 10 **25** 50 100 per page

CHANGE DATE ⌄	CHANGED BY	CHANGE TYPE	DESC
2019-06-19 09:08:03	Admin HRsmart	Task	Actio
2019-06-19 09:08:03	Admin HRsmart	Stakeholder	Action: Adde Name: Admin HRsmart Role: Principal
2019-06-19 09:08:04	Admin HRsmart	Stakeholder	Action: Added Name: Rosa 360 Role: Follower
2019-06-19 09:08:04	Admin HRsmart	Stakeholder	Action: Added Name: Rose 360 Role: Follower

10 **25** 50 100 per page

ATUS ⌄   ACTIONS

complete

Close Window

complete

Rosa 360

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Last sync:

From here, you can see all the pertinent information to help you keep track of the task progress. It displays the change date, who edited or updated the task, and the change description. Depending on the system notification settings configured by your company administrator, task stakeholders also receive a Task Activity Notification whenever changes are made to a task. The notification includes the change details, as well as a link to the specific task..

Assign and Resolve Tasks

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ADDRESS THREE

COUNTRY *

United States of America ▾

ST/PR

-- Select -- ▾

CITY

ZIP/P

This concludes the create and view Tasks click-thru.

COUN

SSN ⓘ

This is an encrypted field.

MOBILE PHONE NUMBER ⓘ

US (+1) ▾

E-MAIL *

CONFIRM E-MAIL *