

# Quick Steps to 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

Dashboard

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REPORTS

Employees

Refresh Filter

## Main Dashboard

The high-level steps to create and view tasks on the My Tasks screen are shown in the menu on the left.

### Navigation

- Click the numbered circles on the left to move to the first step in each phase.
- Use the **Page Down** key to proceed through the quick steps. Use the **Page Up** key to return to a prior slide.

Begin

Kathryn Admin 12-Apr-2018 12-May-2018 +

Re ne Admin 18-Apr-2018 None +

Eped to Admin strator None None +

Best viewed in IE or Adobe PDF Reader.

Get More Widgets

X

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Administration / Global Settings / System Administration / Features

Features

Groups

SELECT A GROUP \*  
Employee

Core

Tasks

Recruiting

Performance

Development

Learning

CoreHR

FILTER

tasks

Click Administration > Global Settings > System Administration > Features.

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

## Admin: Enable the Tasks Feature

## 2 Admin: Configure the Notification Settings

### 3 Admin and Users: Add Tasks

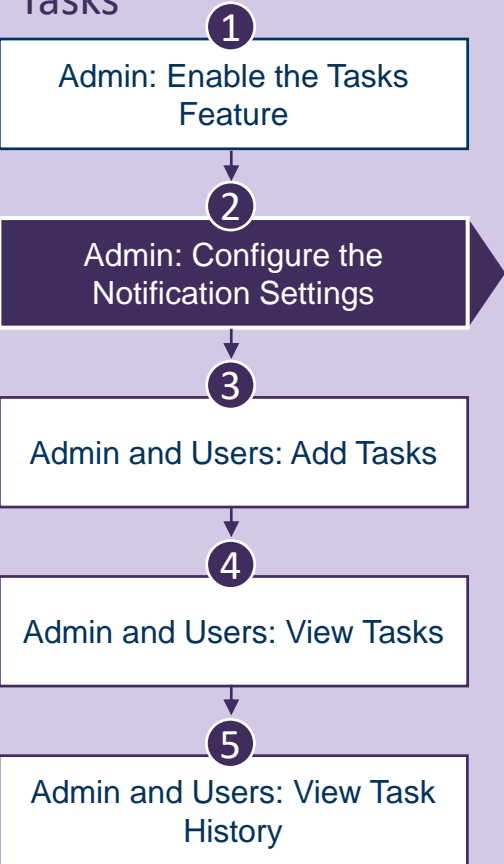
4

Admin and Users: View Tasks

5 Admin and Users: View Task History

- Approval Chains
- Competencies
- Documents
- Job Families
- Job Profiles
- Location Groups
- Locations
- Organizational Structure
- Scales
- Skills
- Users
- View Off-Boarded Users

# Quick Steps to Assign and Resolve Tasks



▼ Onboarding

▼ Project Team

▼ Requisitions


▼ Résumés


▼ Succession Planning

B

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

▼ 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.

▼ Training Wish List

▼ Tuition Assistance Administration

▼ Vendors

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## Main Dashboard

### Alerts

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

Show All

Get More Widgets

Tasks

A

From the Main Dashboard, click Tasks

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.

v16.1.0  
Last sync:

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## CAREER CENTER

## REPORTS

## My Tasks

 Filter

STATUS

Incomplete

CATEGORY

## Personal

[CLEAR FILTER](#)

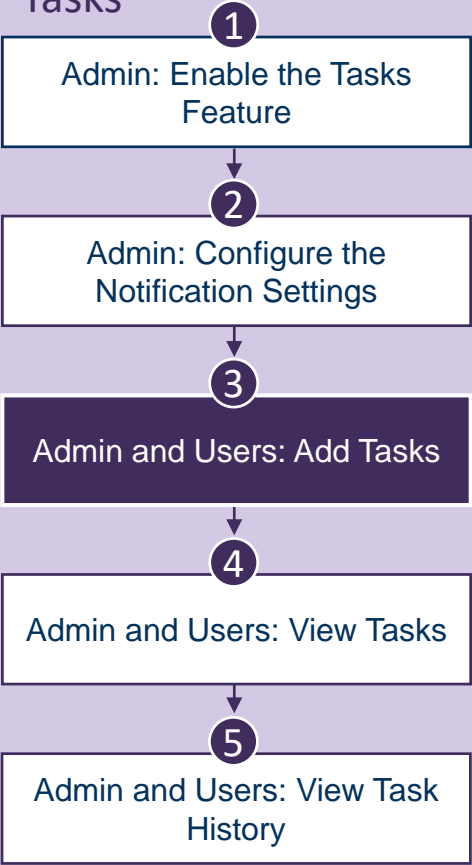
[Click Here](#)

« 1 »

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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			

# Quick Steps to Assign and Resolve Tasks



Add Task

DESCRIPTION

B I U

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**.

D

Remove Assignees if necessary.

DUE DATE

STATUS

Incomplete

IS REQUIRED

IS PRIVATE

IS GROUP

STAKEHOLDERS:

FULLNAME	STAKEHOLDER ROLE	MUTE REMINDERS	ACTIONS
Admin HRamart	Principal	No	<div></div>
Sammie Spam	Assignee	No	<div></div>
Epepito Administrtor	Assignee	No	<div></div>
Kathryn Admin	Assignee	No	<div></div>

ADD MORE STAKEHOLDERS

Add More Stakeholders

E

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

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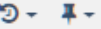
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### My Tasks

Filter

STATUS

Incomplete

CATEGORY

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[Click Here](#)

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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

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.

Click to view the task details.

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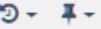
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### View Task

Task actions are also available on the View Tasks screen.

My Tasks



#### 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

You can also add or remove Stakeholders from this screen.

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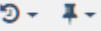
SUCCESSION

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### My Tasks

Add Task

Filter

STATUS

Incomplete

CATEGORY

Personal

CLEAR FILTER

[Click Here](#)

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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	

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.

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History

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## History

### History

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CHANGE DATE ▾

CHANGED BY

CHANGE TYPE

DESC

2019-06-19 09:08:03

Admin HRsmart

Task

Action

2019-06-19 09:08:03

Admin HRsmart

Stakeholder

Action: Added  
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

Close Window

Rosa 360

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..

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History

This concludes the create and view Tasks  
quick steps.

ADDRESS THREE

COUNTRY \*

United States of America

ST/PR

-- Select --

CITY

ZIP/PO

COUNTRY

SSN ⓘ

This is an encrypted field.

MOBILE PHONE NUMBER ⓘ

US (+1)

E-MAIL \*

CONFIRM E-MAIL \*