# Functional Overview
# Task Assignment Module

# Task Assignment Module Configuration

Note:-To Use Task Assignment Module Initial Configuration of Task Assignment is to be Done as Follows

## Step 1
Go to Dashboard and Select Sub Menu School Configuration

**Admin Activities**
- » **School Configuration**
- » **Reports**

## Step 2
Select Payroll Related menu from the School Configuration List

| Inventory Related |
| --- |
| Payroll Related |
| Transport Related |
| Xseed Report Related |
| **Task Related** |
| Accounts Related |

# Task Assignment Related Items To Configure

To use the Task Assignment Module, user needs to do initial configuration related to Task Related Items.

| Inventory Related |
| Payroll Related |
| Transport Related |
| Xseed Report Related |
| **Task Related** |
| Accounts Related |

| Status | Configuration |
|--------|---------------|
| ✓ | WorkFlow Role Configuration |

# WorkFlow Role Configuration

On WorkFlow Role Configuration, User can decide which user can assign task to users using the designations of users.

**Step-1**

Task Assigner: Chief Administrative Officer ▼

**Step-2**

Can Assign Task To :

| | Role |
|---|---|
| ☐ | **Role** |
| ☐ | Principal |
| ☑ | Headmistress |
| ☐ | Headmaster |
| ☐ | Co-ordinator |
| ☑ | Teacher |
| ☑ | Dance Teacher |
| ☐ | Shikshan Sevak |
| ☑ | Counsellor |
| ☑ | P.E. Teacher |
| ☐ | Senior Administrative Officer |
| ☑ | Accounts Cum Admin Officer |
| ☐ | Accountant |
| ☑ | Accounts Assistant |
| ☑ | Librarian |

**Step-3**  Save   Cancel

Step 1-Select Task Assigner's designation from dropdown.

Step 3-Click on Save Button.

Step 2-Select the assignee's designations from list.

# Task Assignment

On Task Assignment, User can search task assigned to users and also task assigned by users.



Step 1 - Select search criteria as you required

Step 2 – Click on Search button

# Add New Task

User can assign task to whom he/she can assign task as configured in Task Related configuration by clicking Add New Task.

**Add New Task**

*Mandatory Fields*

**Task Details :**

| | |
|---|---|
| Task : | **Step-1** |
| Task Details : | **Step-2** |
| Start Date and Time : | 09-Jan-2013 * 10:00 AM* End Date and Time : 23-Jan-2013 * 10:00 PM* |
| | e.g. 10:00 AM **Step-3** e.g. 10:00 AM |
| Buffer Date and Time : | 24-Jan-2013 10:00 AM ○ Daily Task ● Normal Task ○ General Task |
| **Step-4** | e.g. 10:00 AM **Step-5** |
| | **Step-6** Next Cancel |

Step 1-Write Your Task.

Step 2-Enter Task Details.

Step 3-Enter Start-End Date for Task.

Step 4-Enter Buffer Date and Time.

Step 5-Select Task Type.

Step 6-Click on Next Button.

# Add New Task

**Add New Task**

\* Mandatory Fields

Assigned To : | Accounts Assistant [▼] \*    Step-7          ☐ Include Me

| ☐ | Resource Name | Designation | Task Details |
|---|---|---|---|
| Step-8 ☐ | Mrs. Namrata Takalkar | Accounts Assistant | ← |
| ☐ | Mr. Yogesh P. Antony | Accounts Assistant | ← |

| Task Name | Assigner Name | Start Date and Time | End Date and Time |
|---|---|---|---|
| Check muster entries | Mr. Yatin D. Ghanwat | 01-Jan-2014 10:00 AM | 28-Feb-2014 11:00 AM |

Here, user can view the details of existing assigned tasks.

**Cancel**

**Previous**    **Next**    **Cancel**

Step-9

Step 7-Select Assignee for the Task.

Step 8-Select Resource Name.

Step 9-Click on Next Button.

# Add New Task

On Add New Task Button user can assign Task to whom he/she can assign task as configured in Task Related configuration.

**Add New Task**

\* Mandatory Fields

| | |
|---|---|
| Status : | Not Started ▼ * |
| Comment : | |
| Comment History : | |

[ Previous ] [ Finish ] [ Cancel ]

Step-10

Step 10- Click on Finish Button to Add Defined Task.

# Edit Task

User for whom task is assigned, can edit the task and only change status as in progress, on hold etc

○ Assigned To   ● Assigned By

| Role : | All ▼ | | Resource : | All ▼ |
| Task Type : | -- Select -- ▼ | | Status : | -- Select -- ▼ |
| Start Date and Time : | | | End Date and Time : | |

e.g 10:10 AM                                    e.g 10:10 AM

**Search**

Edit task

| sk Type | User Name | Start Date and Time ▲ | End Date and Time | Status | Edit | Delete |
|---------|-----------|----------------------|-------------------|--------|------|--------|
| ily | Mr. Yatin D. Ghanwat | 01-Jan-2014 10:00 AM | 01-Jan-2014 11:00 AM | On Hold | ✏ | |
| ily | Mr. Yatin D. Ghanwat | 02-Jan-2014 10:00 AM | 02-Jan-2014 11:00 AM | In Progress | ✏ | |
| ily | Mr. Yatin D. Ghanwat | 03-Jan-2014 10:00 AM | 03-Jan-2014 11:00 AM | In Progress | ✏ | |

**Back**   **Add New Task**

Assigner can edit or delete the assigned task.

# Change Task Status

Assignee can change status and add comment and click on finish button.

## Add New Task

*Mandatory Fields

| | | |
|---|---|---|
| Status : | In Progress ▼ * | Change Status |
| Comment : | | Enter Comment |
| Comment History : | Mr. Yatin D. Ghanwat - Jan 3 2014 10:57AM - Task is started | |

Previous | Finish | Cancel

Click on Finish

# Task Status

Once task is completed, assigner and assignee cannot edit/delete that task.

◯ Assigned To    ⦿ Assigned By

Role :    | All ▼          Resource :  | All ▼

Task Type :  | -- Select -- ▼          Status :  | Completed ▼

Start Date and Time :  [          ] 🔲 [     ]          End Date and Time :  [          ] 🔲 [     ]

e.g 10:10 AM          e.g 10:10 AM

**Search**

| sk Type | User Name | Start Date and Time ▲ | End Date and Time | Status | Edit | Delete |
|---------|-----------|----------------------|-------------------|--------|------|--------|
| ily | Mr. Yatin D. Ghanwat | 01-Jan-2014 10:00 AM | 03-Jan-2014 11:00 AM | Completed | | |

**Back**    **Add New Task**

# Thank You

For Queries contact

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