

Simply Personnel Task List

A Guide to Understanding and Using the Task List

Simply Personnel: Task List

This document provides step-by-step guide for users to give an easy understanding on using the task list system.


If at any time you need help or just need some questions answered please use our on-line helpdesk at www.simplypersonnel.co.uk where you will find comprehensive articles and an option to open a support ticket.

Thank you

The Simply Personnel Team.

Task List

On the main dash board of Simply Personnel we can see the traffic light system at the top and shown below are the three stages that the system can go through when a task is added.








Task Summary

- 8 URGENT TASKS
- 2 UPCOMING TASKS
- 12 FUTURE TASKS

Click [here](#) to review and action

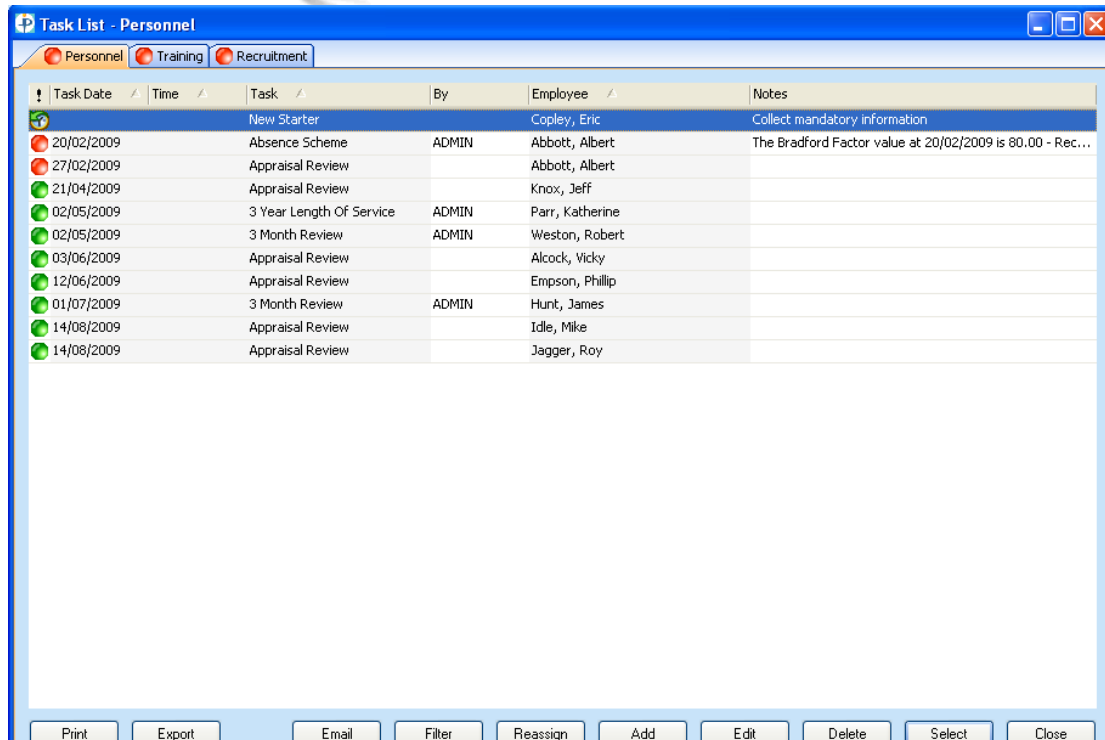
The traffic light system works by going from green to amber to red as the task becomes upcoming or urgent.

	the task is due to be completed today or is overdue.
	the task is due to be completed in the next seven days.
	the task is due to be completed more than seven days from today.
	the task does not have a date set, for example it is a stage of the New Starter process.
	the task has been completed.

The symbol underneath the green light represents a task that has not yet been put into action as it states the task may be for a new starter or a review etc, and the green tick shows a task that has been completed.

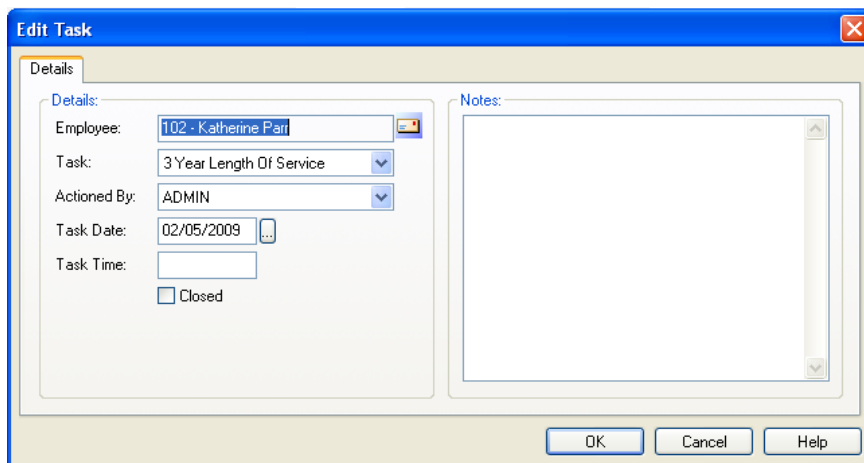
When filtering tasks you can use the tick box so that it will allow you to see the tasks that have been completed.

Your daily task list will appear as the following window.



Task Date	Time	Task	By	Employee	Notes
		New Starter		Copley, Eric	Collect mandatory information
20/02/2009		Absence Scheme	ADMIN	Abbott, Albert	The Bradford Factor value at 20/02/2009 is 80.00 - Rec...
27/02/2009		Appraisal Review		Abbott, Albert	
21/04/2009		Appraisal Review		Knox, Jeff	
02/05/2009		3 Year Length Of Service	ADMIN	Parr, Katherine	
02/05/2009		3 Month Review	ADMIN	Weston, Robert	
03/06/2009		Appraisal Review		Alcock, vicky	
12/06/2009		Appraisal Review		Empson, Phillip	
01/07/2009		3 Month Review	ADMIN	Hunt, James	
14/08/2009		Appraisal Review		Idle, Mike	
14/08/2009		Appraisal Review		Jagger, Roy	

Tasks can be added manually on a day to day basis or they can be added automatically as shown in the section below.



Edit Task

Details

Details:

Employee: 102 - Katherine Parr

Task: 3 Year Length Of Service

Actioned By: ADMIN

Task Date: 02/05/2009

Task Time:

Closed

Notes:

OK Cancel Help

Select the employee that the task relates to, choose the task and set the dates.

Personal tasks are set up in the **System Setup > Business Rules > Optional** area under **task** list and then Personal tasks.

Personnel Tasks
Automatic Task Dates

Click on the add button and then fill in the heading for the task you require, this will generate a drop down list to select from when you are creating a task.

You can also export any tasks to save them as a CSV file using the export option.

Automatic Task Dates

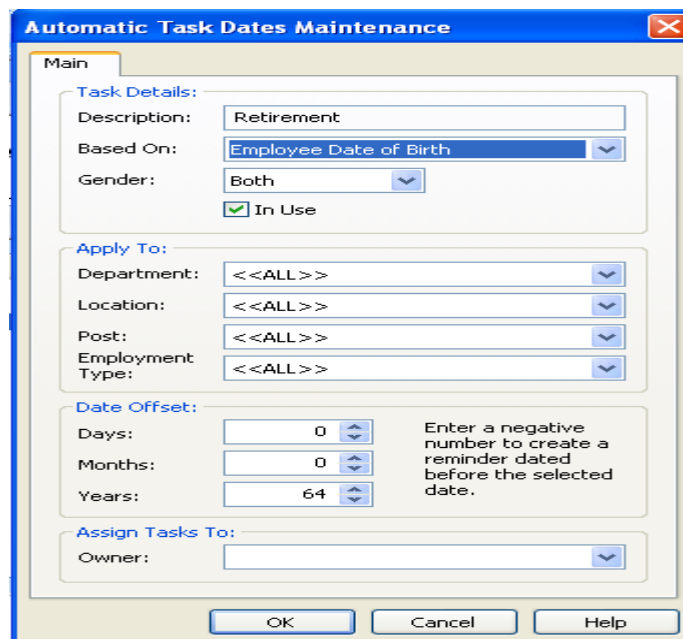
Simply Personnel can be configured so that when adding new employees tasks can be automatically added to the Task List based upon the employee's start date or date of birth. This can be useful, for example, for scheduling three month probationary reviews.

Automatic tasks can also be used to add tasks based around an employee's leaving date when they are marked as leavers.

If an employee's date of birth, start date or leaving date is altered then any automatic tasks that have been created based on these fields will also be updated to reflect the change.

To create or update an automatic task date select the task list option under **system setup** and choose **Automatic Task Dates**.

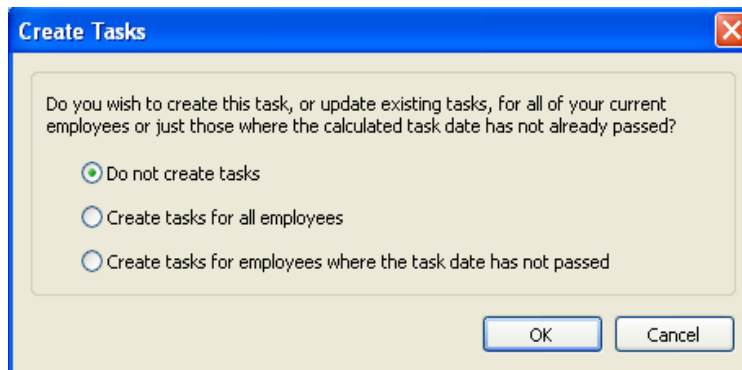
Click on the Add button to create a new automatic task or Update to edit an existing one.



Description - Enter a description for the task.

Based On – Select whether to base the calculated task date on the Employee Start Date, Employee Date of Birth or Employee Date Left.

Once you have put in the details for the automatic task click on ok, this window will appear and select the option you require.



This will then remind you automatically when the task needs completing