# Staying on Top of Your Duties: Administrative Tasks and Workflows

## TDU Risk Summit - 2016
## Diedre Van Zandt

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# Agenda

- Define and create tasks
- Define and create a workflow
- Discuss real-world/functional office tasks and workflows

# What is a task?

- A task is essentially a 'to do' item
- A task can only be assigned by an admin to another admin

# A task includes ...

| Task | |
|---|---|
| Assign workflow: | No workflow assignment ▼ |
| Subject*: | [_____] |
| Description: | [_____] |
| | 4000 characters left |
| Target: | |
| Status: | Open ▼ |
| Priority: | Medium ▼ |
| Due Date: | [📅] [_____] (Format: mm/dd/yyyy) |
| Assigned to*: | not assigned - Edit |
| Task Type: | - select - ▼ |
| Send notification to assigned admin: | ☐ Email ☐ SMS |
| Send notification to task creator: | ☐ Email ☐ SMS |

* Required field

Cancel   Add

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# Sample email notification

To: *erivers@terradotta.com*

From: *rparker@terradotta.com* *(Email notifications are sent from the Contact 1 email address)*

Subject: Task notification: *Review Learning Content*

*Office Name* - Task Notification

A task assigned to you has been created.

Subject: *Review Learning Content*

Description: *Please review this Arrival Information LCP. Let me know when you're done and*

Deadline: *08/21/2015*

Priority: *Medium*

Status: *Open*

To go directly to the task target, click the following link:

*LCP: Arrival Information*

# Tasks with a Target

- The following items can serve as an object of a task:
  - Profile - *every tab can be an object*
  - Application - *every tab can be an object*
  - Program Builder - *every tab can be an object*
  - Application Cycle - *every tab can be an object*
  - Info Request
  - Exchange Balance
  - Questionnaire - *configuration pages under Process Admin*
  - Material - *configuration pages under Process Admin*
  - Assessment - *configuration pages under Process Admin*
  - Learning Content - *configuration pages under Process Admin*
  - Home Course
  - Site Content Pages
  - Document Center Documents
  - Saved Query Results
  - Credit Equivalency Request

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# How to enable tasks

- To enable:
  - System Settings > System Features > Administrative > Task/Workflow Configuration

# Demo - Tasks

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# FYI's - Tasks

- Tip: I recommend customizing the Task Lists - at least on the Admin Home page.  Otherwise, you will see all tasks assigned to and/or by others.
- Note, admins can see if tasks are past due
- Tasks cannot be deleted.  The status, however, can be updated.  (Open, In process, Pending, Completed)

# What is a workflow?

- A series of tasks where each task is automatically generated in sequence when the previous task in the workflow is marked as complete.
- Workflows can be triggered manually by an admin user or automatically by a query watch.
- Permissions requirement: Staff Admin: Workflow (view)

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# Demo - Workflow

# Email notification - workflow complete

To: diedrev@terradotta.com
From: support@terradotta.com
Subject: Workflow completed: Incident Report - Robbery - DV

**International Office- Workflow completed: Incident Report - Robbery - DV**

This is an automated notification that a workflow has completed.

Workflow: Incident Report - Robbery - DV
Target: App: Dupree, Randy - Incident Report - DV, Calendar Year 2016...

This message was generated automatically

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# FYI's - Workflows

- Workflows can….
  - be deleted if they have never been used
  - be edited if they are 'inactive'
  - have targets or no targets
  - be started in Batch
  - have up to 19 tasks, with the 20th task being a new workflow
  - have more than one task assigned at a time (two number three's)
- Workflows cannot…
  - be deleted once used, only retired

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# Who to include in workflows?

- Key stakeholders: (depending on the incident)
  - Dean of Students
  - Director of Health Clinic
  - Women's Resource Center (or similar)
  - Risk Manager for the institution
  - Campus Police Chief
  - Study Abroad Director
  - ISSS Director
  - Associate Provost or their Admin Asst.

# Discussion: Real world tasks and workflows

- Tasks
  - Reviewing of registrations or incident reports
  - Updating website content or process elements
- Workflows
  - Processing incident reports
  - Reviewing travel waivers or registrations to restricted countries.

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# Questions about Tasks or Workflows?

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# Helpful Knowledge Base Articles

- [Administrative Tasks: Part I - Configuring the 'Task' Feature and Task Lists](#)
- [Administrative Tasks: Part II - Creating Tasks](#)
- [Administrative Tasks: Part III - Workflow](#)
- [WEBINAR: Putting Workflows to Work](#)

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# Session Evaluation

- Presenter: Diedre Van Zandt
- Title: Staying on top of your Duties: Tasks and Workflows
- Time: Tuesday, 1/12/16

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