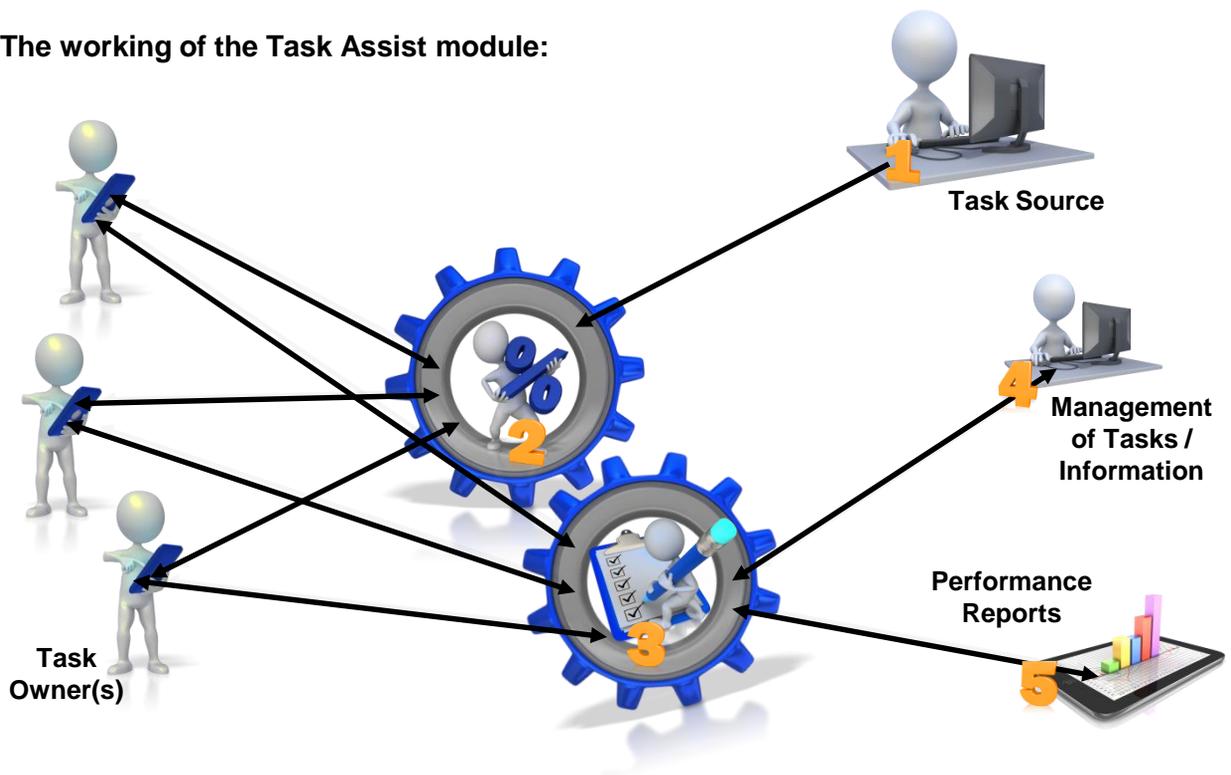


Purpose of the Task Assist module:

Task Assist facilitates the allocation, tracking and reporting of tasks between the various users in the organisation. Management can track the status of all updated actions at any time. Users are notified via e-mail of all new actions assigned to them and the progress status of actions they have assigned to others. The reporting function of this module provides filters that allow for the generation of customised reports that assist with the tracking of tasks assigned, the meeting of deadlines and the performance management of users. Through the use of User Defined Fields (UDFs) Action Assist can be customised to meet organisational requirements.



The working of the Task Assist module:



- 1** - The Task Source captures the required tasks on the online system using the SMART principles. Each Task is assigned to at least one Task Owner;
- 2** - The Task Owner(s) will review the queries and will update the progress towards completion on the system by updating the task status, the percentage (%) of completion and any other created UDF fields;
- 3** - The Action Owner(s) will mark the task as complete once the action has been completed. This will update the users personal dashboard;
- 4** - The Management team and other operational support functions can access the system to provide support and guidance to the Task Owner(s) with the completion of the required tasks. Assigned tasks can be edited by the Task Source as and when operationally required;
- 5** - The users can generate reports and graphs as required. The information presented is supported by the automated online activity log.



Key features of Task Assist include:

- the availability of an online Task Register;
- functionality for the module administrator to define and manage user access as required by the organisation;
- functionality for the module administrator to define all the client specific defaults for the module which includes functionality to allow the user to assign each task a topic, instruction, required deliverable, status, deadline date and as many additional user defined fields (UDFs) as operationally required. The additional UDFs can be either numeric, date, list or text fields;
- easy, user friendly update process;
- data import and export functionality with the use of CSV files;
- real-time up to date dashboards for each user showing the users overdue tasks, tasks due today and tasks due in the future number of days as defined by the specific user;
- a 3-Click process for action owners to update the tasks assigned to them;
- functionality for the users to attach documents to tasks as is operationally required;
- standard audit trail reporting where all activity on the tool is logged and time stamped.

Operational management benefits of Task Assist include:

- high level of organisational customisation in defining the module setups to meet the organisations own business requirements;
- automatic generation of notifications and reminders to predefined users;
- The individual user dashboards clearly show the progress to completion of tasks assigned to the user and if the task is overdue (past the defined deadline date);
- users with the appropriate level of user access can view their own tasks and tasks assigned to other users;
- users can generate their own customised reports using the report generation functionality which allows for the use of various data filters and data grouping tools;
- reporting is generated on screen or exported to excel;
- improved communication between all stakeholders as up to date information is available on a centralised database (Online Task Register) to all registered users at all times;
- actions are assigned to queries using the SMART principles;
- the output from the task management processes can assist with operational and individual performance management;
- task data is kept in the data base for future reference and reporting purposes;



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