4. Tasks | Work'N'Roll

4.1 Tasks

4.1.1 On the homepage, select the Tasks section

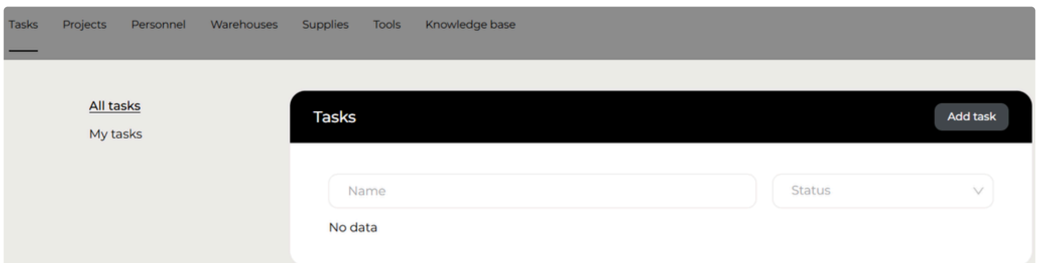

Figure 4.1- Tasks

4.1.2 Click Add task

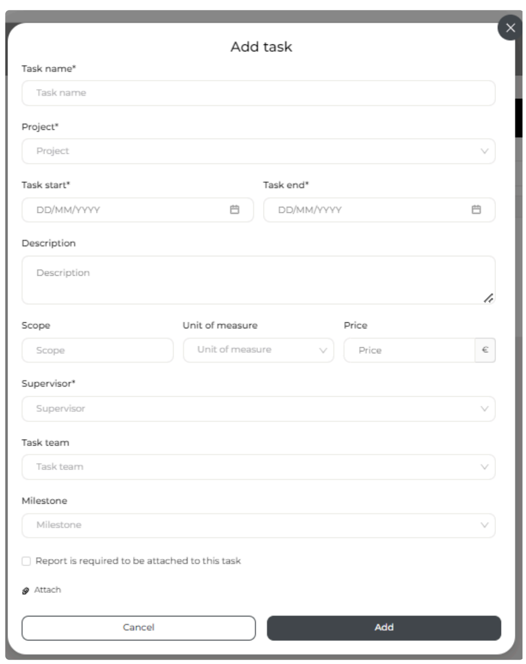

Figure 4.2 - Task description

4.1.3 Enter the task name (required field)

4.1.4 Select the required project from the dropdown list (required field)

4.1.5 Specify the task start date (required field)

4.1.6 Specify the task end date (required field)

4.1.7 Describe the task

4.1.8 Specify the scope of the task

4.1.9 Specify the unit of measurement

4.1.10 Specify the cost

4.1.11 Select the project manager (required field).

4.1.12 Select a command for the task

4.1.13 Specify the milestone

4.1.14 If necessary, check the box next to Report must be attached to this task

4.1.15 Click Add

4.2 Searching

4.2.1 On the home page, select the Tasks tab

4.2.2 Select All tasks or My tasks

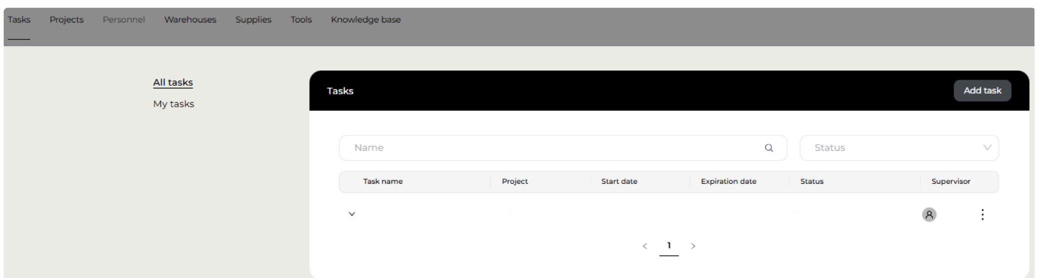

Figure 4.3 - Task Search

4.1.16 Search by task name or status

4.3 Task management

4.3.1 Click the icon with three dots next to the required task

> NOTE.
>
> You will see a drop-down list with a list of actions

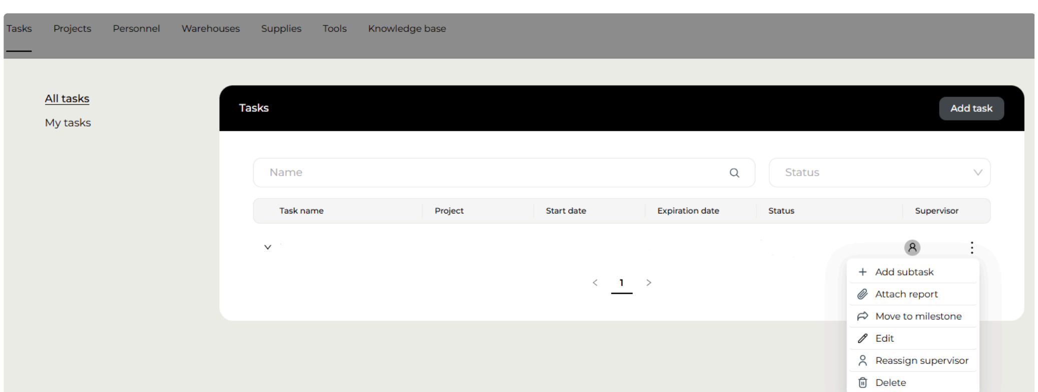

Figure 4.3 - Task management

4.3.2 Enter Add subtask

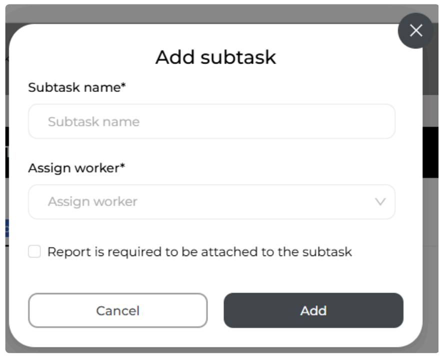

Figure 4.4 - Subtasks

4.3.3 Enter the sub-task name

4.3.4 Select the assignee from the dropdown list

4.3.5 Select the checkbox next to the item Report must be attached to a subtask

4.3.6 Click Add

4.3.7 Click on the icon with three dots in the field with the required task, select “Attach Report” from the drop-down list

4.3.8 Attach the required file

4.3.9 Click on the icon with three dots in the field with the required task, select “Move to Milestone” from the drop-down list

4.3.10 Move the task to the desired milestone

4.3.11 Click on the icon with three dots in the field with the required task, select Edit from the drop-down list

4.3.12 Edit the required task

4.3.13 Click on the icon with three dots in the field with the required task, select Reassign Supervisor from the drop-down list

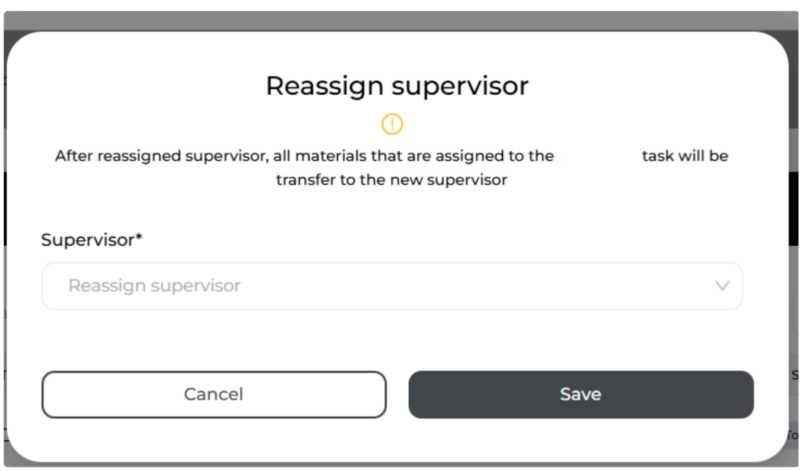

Figure 4.5 - Supervisor reassignment

4.3.14 Select the employee's name from the dropdown list

4.3.15 Click Save

4.3.16 Click on the icon with three dots in the field with the required task, select Delete from the drop-down list

4.3.17 Delete the task

4.4 Task information

4.4.1 On the home page, select the Tasks” section

4.4.2 Select All Tasks

4.4.3 Click on the required task

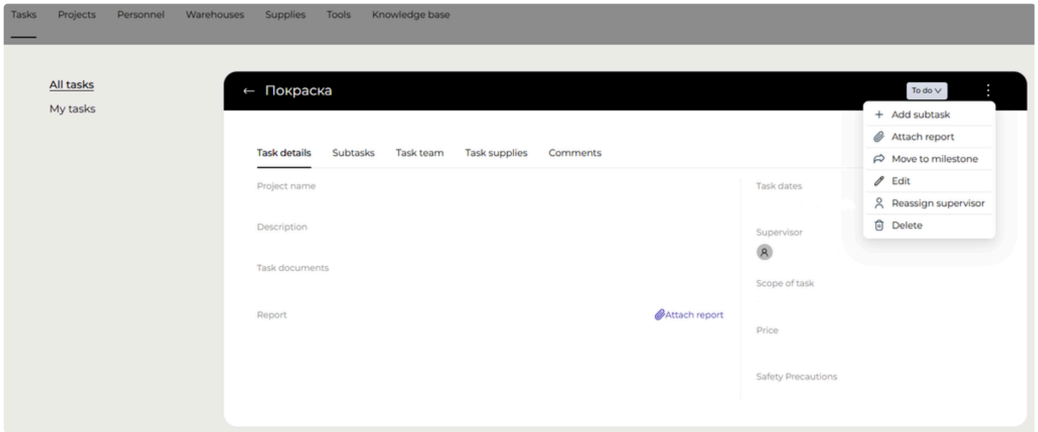

Figure 4.7- Task information

4.4.4 Click on the icon with three dots in the field with the required task, select the required task from the drop-down list

Next See par. 4.3

4.4.5 Click on the Task Details tab

4.4.6 View the project name, description, task documents, report

4.4.7 Click the Subtasks tab

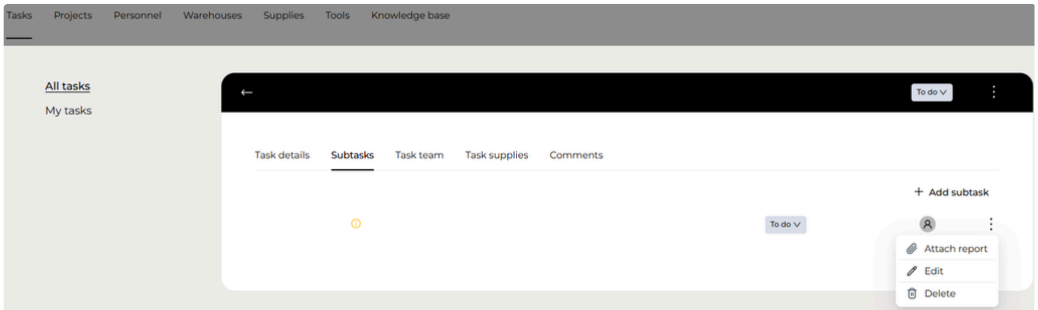

Figure 4.8 - Subtask Information

4.4.8 View subtask description, status, responsible person

4.4.9 Click Add subtask

Next Refer to section 4.3.2

4.4.10 Click on the icon with three dots in the field with the required subtask, select from the drop-down list: attach report, edit, delete

4.4.11 Click the Command to task tab

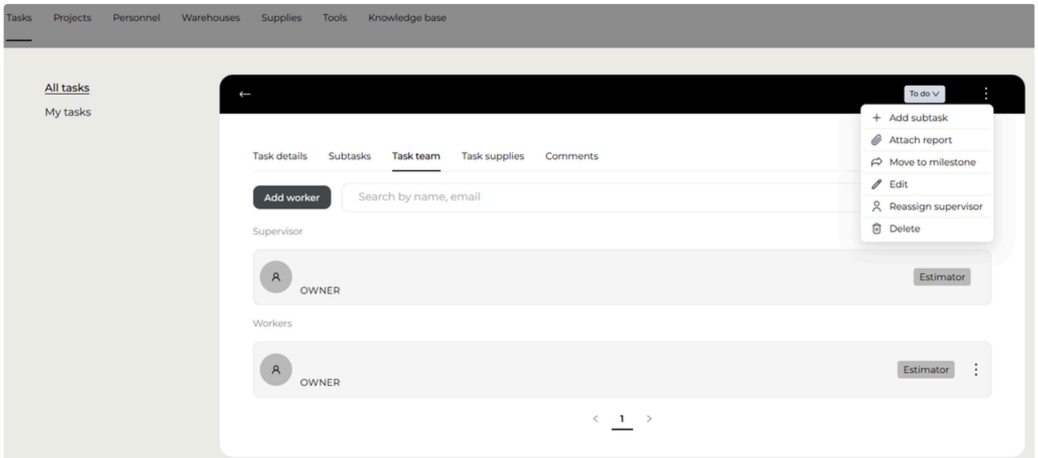

Figure 4.9 - Task team

4.4.12 Click Add Employee

4.4.13 Select the desired employee from the drop-down list

4.4.14 Click Add

4.4.15 Search for the employee by name or e-mail

4.4.16 Click on the user card with and view the employee's information

4.4.17 Click on the Task Materials tab

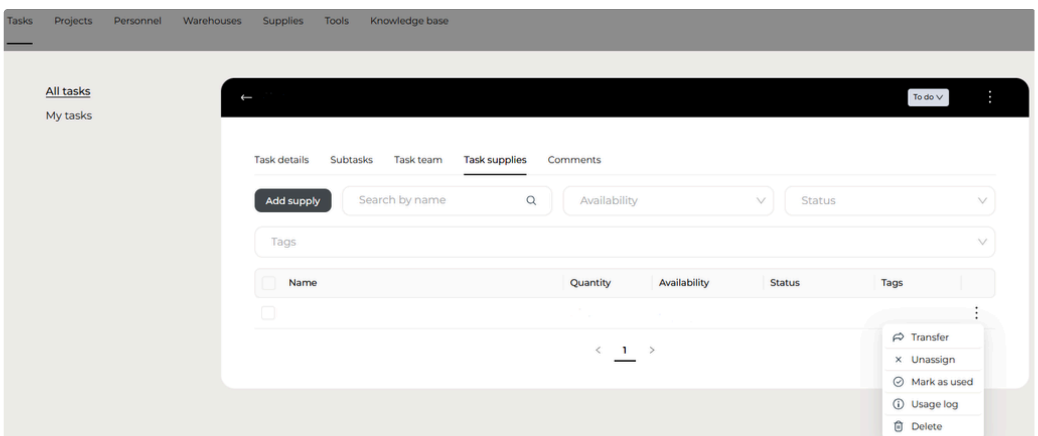

Figure 4.10 - Task Materials

4.4.18 Click Add Material

4.4.19 Enter a name and quantity

4.4.20 Click Add

4.4.21 Search by title, by availability, by status, or by tags

4.4.22 Click on the three-dot icon in the field with the desired material, select from the drop-down list: move, unassign, mark as used, delete

Next See item. 7. Supplies | Work'N'Roll

4.4.23 Click on the Comments tab

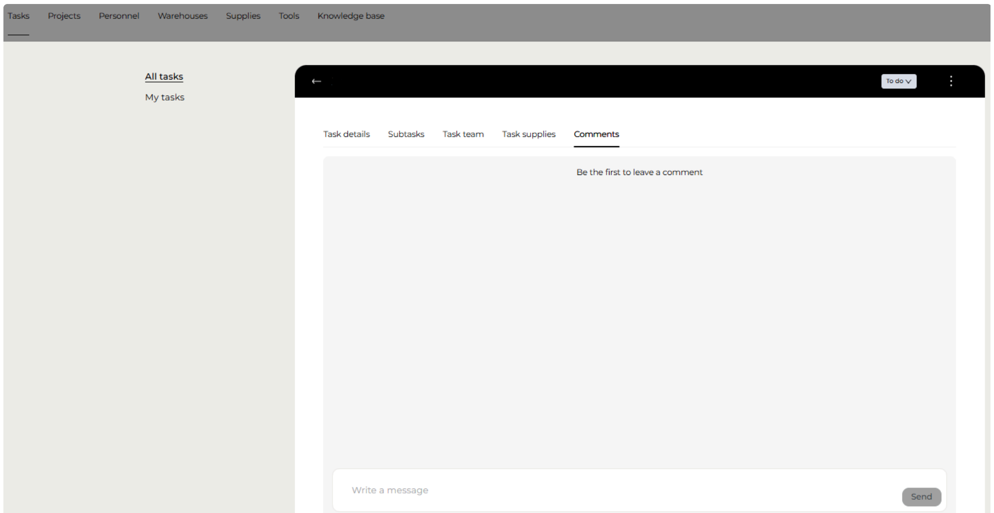

Figure 4.11 - Comments

4.4.24 Leave comments as appropriate

4.4 My tasks

4.5.1 On the home page, select the Tasks tab

4.5.2 Go to My Tasks

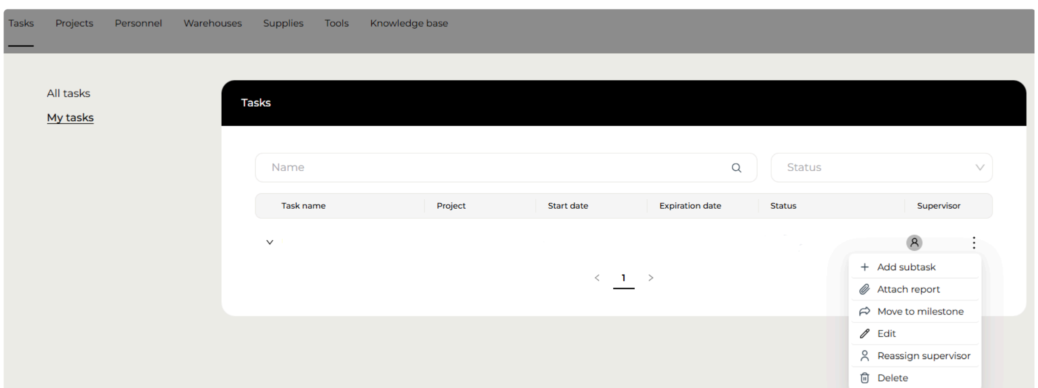

Figure 4.12 - My tasks

4.5.3 Search for tasks by name or status

4.5.4 View information about tasks: title, project, project start and end date, status and responsible executor

4.5.5 Click on the icon with three dots in the field with the required task

> NOTE.
>
> You will see a drop-down list with a list of actions

Next Refer to section 4.3.2