



Task Management

Overview

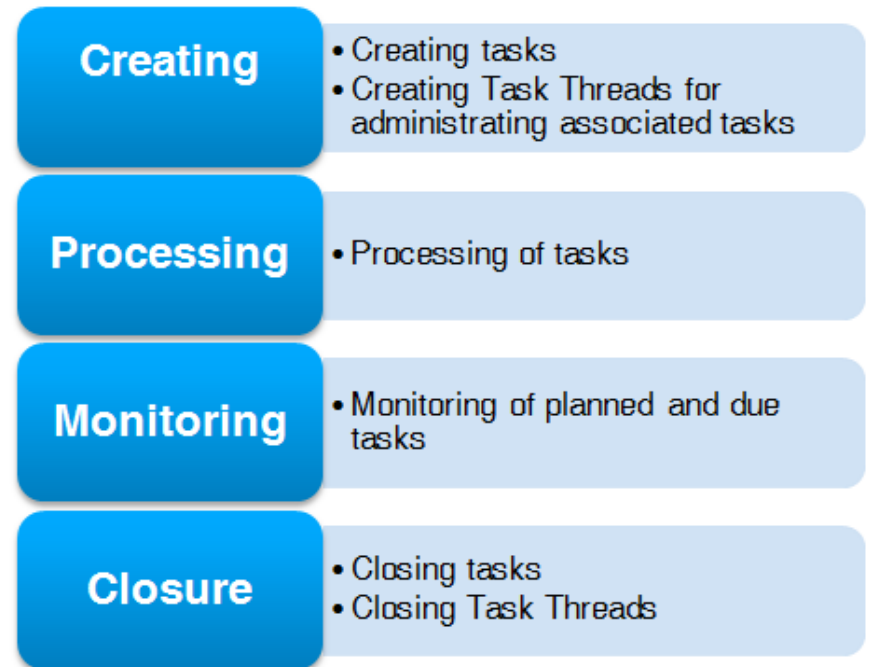
- OMNITRACKER Task Management at a glance
- Technical features
- Processes
 - Creating
 - Processing
 - Monitoring
 - Closure
- Roles and Privileges
- Workflows
- Reports
- Extensibilities

Efficient, target-oriented implementation of projects with OMNITRACKER Task Management

- Software to support planning, creating, administrating and monitoring of tasks
- Administrating, coordinating and monitoring of activities within an organization

OMNITRACKER Task Management integrates the following processes:

- Creating
- Processing
- Monitoring
- Closure



Creating and monitoring

- Create, process and depute tasks
- Assign task priorities
- Allocate tasks to projects or customers
- View and monitor own tasks as well as deputed tasks at a glance
- Create subtasks
- Create task threads to manage tasks that belong together
- Define types of tasks
- Define automated escalation

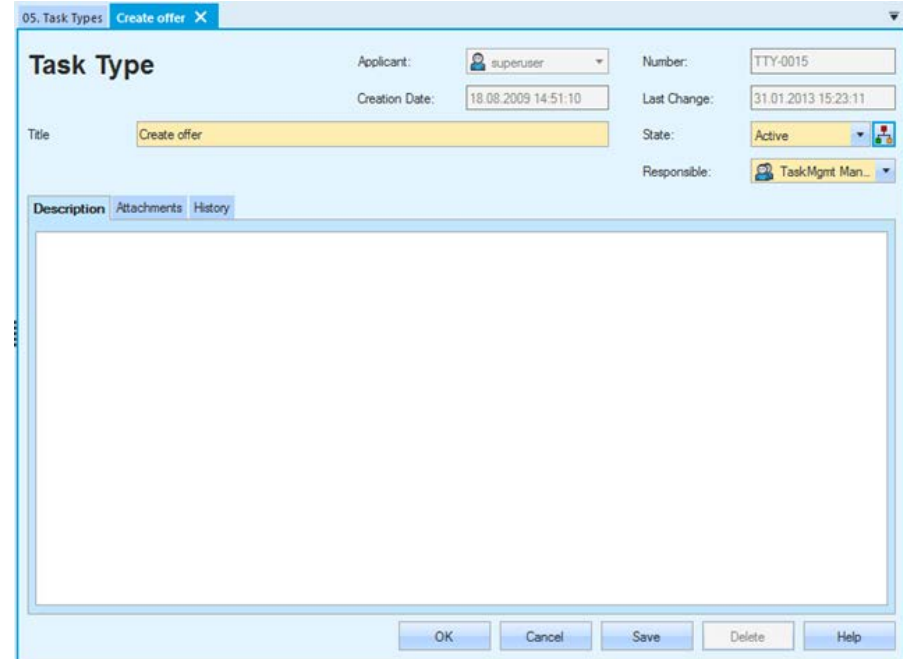
Interface and display

- Create management reports

Miscellaneous

- Web interface
- Integration in Microsoft Outlook
- Integration of further OMNITRACKER solutions e.g. OMNITRACKER Sales Management

- A task may be initiated by creation of:
 - Task Thread: Task packages
 - Managing of all steps referring to a common project
 - Comprise several tasks belonging together
 - Tasks: individual task
- Categorization of tasks using predefined task types



05. Task Types Create offer X

Task Type

Applicant: Number:

Creation Date: Last Change:

Title: State:

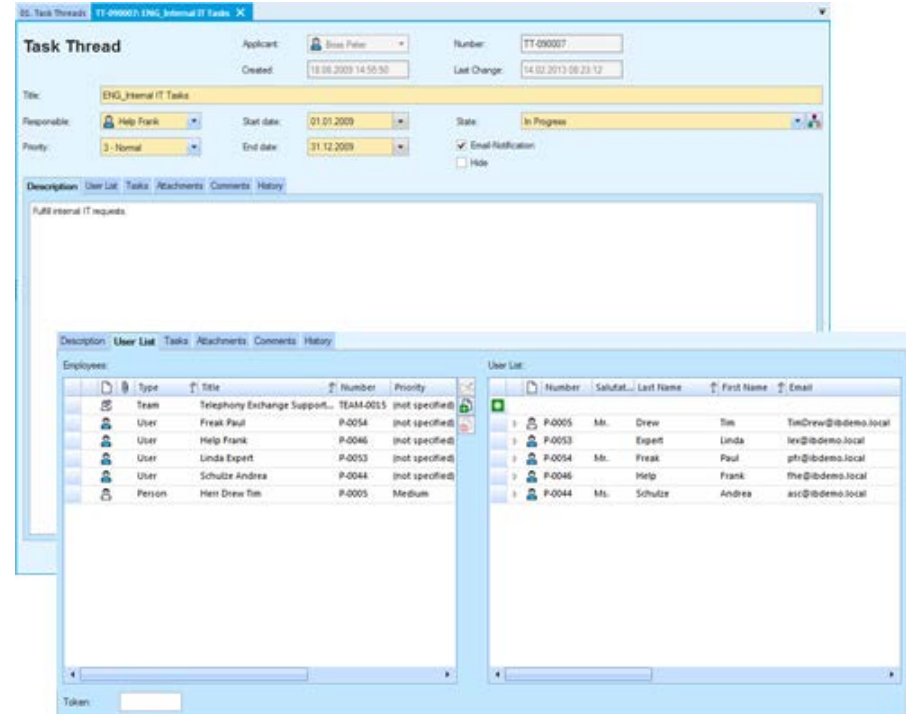
Responsible:

Description Attachments History

OK Cancel Save Delete Help

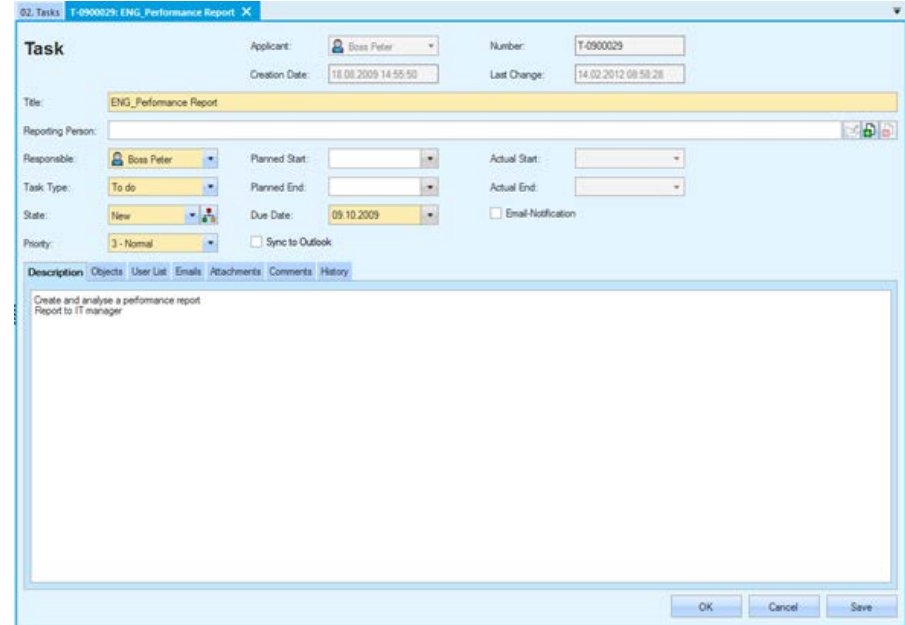
Creating Task Threads:

- Definition of the key elements of a task thread
 - Begin
 - End
 - Priority
 - Responsible
- Specify all users in charge of a Task Thread
- The applicant and the person responsible are added automatically to the user list.



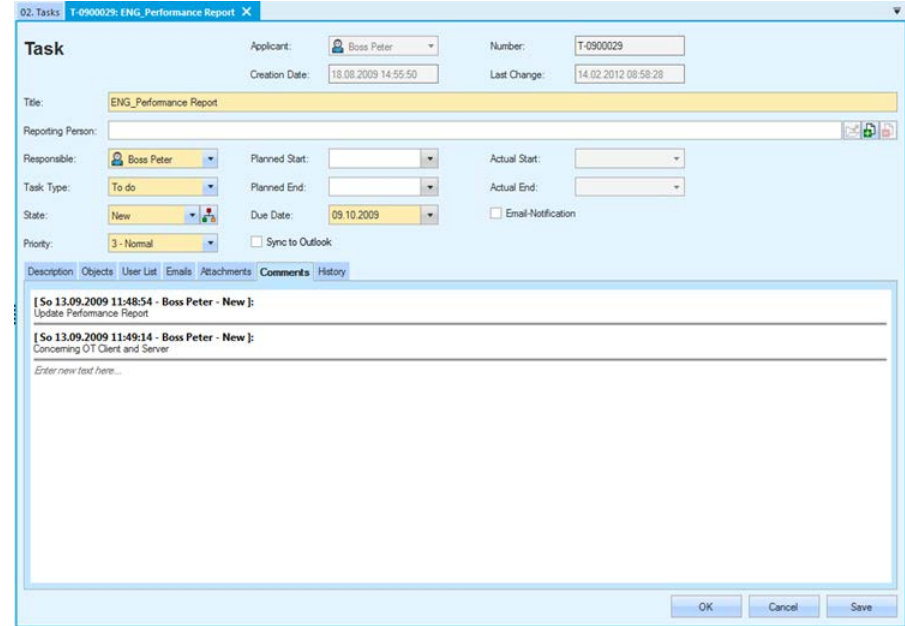
Creating Tasks:

- Definition of
 - Task type
 - Responsible
 - Priority
 - Start/end date
- Adding of
 - Comments
 - Attachments
 - Emails
- Deputing of tasks:
 - New person responsible receive an automated email with a request to process and complete the task



The screenshot shows the 'Task' creation form in OMNITRACKER. The form is titled '02: Tasks T-0900029: ENG_Performance Report'. It includes fields for 'Applicant' (Boss Peter), 'Number' (T-0900029), 'Creation Date' (18.08.2009 14:55:50), and 'Last Change' (14.02.2012 09:58:28). The 'Title' field contains 'ENG_Performance Report'. Below this are fields for 'Reporting Person', 'Responsible' (Boss Peter), 'Task Type' (To do), 'State' (New), and 'Priority' (3 - Normal). There are also fields for 'Planned Start', 'Planned End', 'Actual Start', and 'Actual End'. A 'Due Date' field is set to '09.10.2009'. A checkbox for 'Email-Notification' is present. At the bottom, there are 'OK', 'Cancel', and 'Save' buttons. The 'Description' tab is active, showing the text: 'Create and analyse a performance report Report to IT manager'.

- Processing of individual tasks
- Specify of a „reporting person“
- Adding of
 - Comments
 - Descriptions
 - Emails
- Integration with OMNITRACKER Sales Management Center
- Integration in Microsoft Outlook:
 - Create
 - Process
 - Completion of tasks within Outlook



The screenshot shows a task processing window titled "02: Tasks T-0900029: ENG_Performance Report". The window contains the following fields and controls:

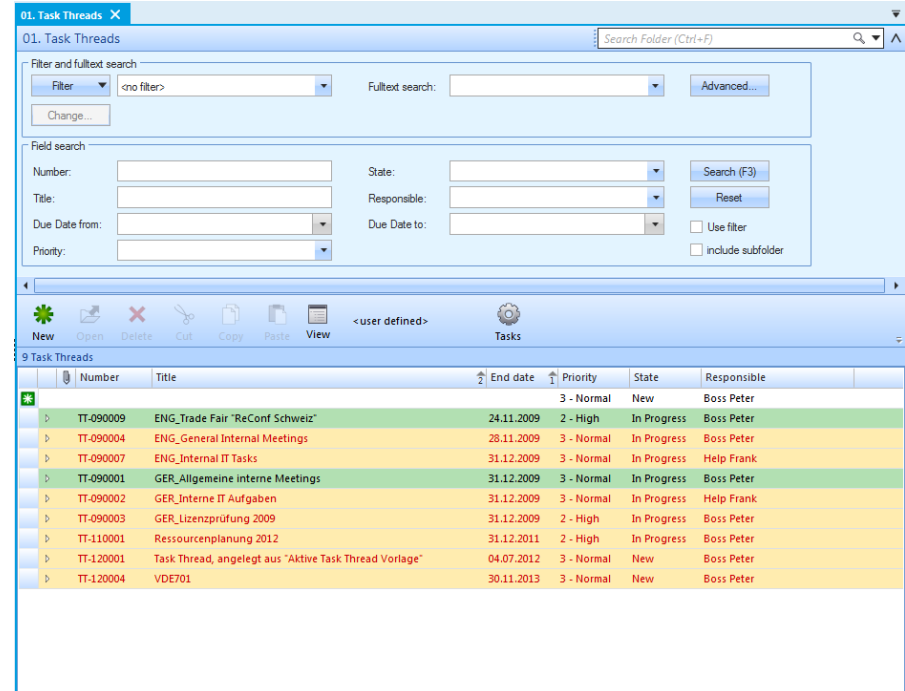
- Task:** Applicant: Boss Peter, Number: T-0900029, Creation Date: 18.08.2009 14:55:50, Last Change: 14.02.2012 08:58:28
- Title:** ENG_Performance Report
- Reporting Person:** (Empty field)
- Responsible:** Boss Peter, Planned Start: (Empty), Actual Start: (Empty)
- Task Type:** To do, Planned End: (Empty), Actual End: (Empty)
- State:** New, Due Date: 09.10.2009, Email-Notification
- Priority:** 3 - Normal, Sync to Outlook

Below the form is a tabbed interface with "Comments" selected. The comments section contains two entries:

- [So 13.09.2009 11:48:54 - Boss Peter - New]: Update Performance Report
- [So 13.09.2009 11:49:14 - Boss Peter - New]: Concerning OT Client and Server

At the bottom of the window are "OK", "Cancel", and "Save" buttons.

- Monitoring of tasks and task threads
- Visibility of tasks can be individually configured for each user
- Transparent view of tasks and task threads is provided by:
 - Up-to-date status displays of individual and deputed tasks
 - history
 - reports



	Number	Title	End date	Priority	State	Responsible
+	TT-090009	ENG_Trade Fair "ReConf Schweiz"	24.11.2009	2 - High	In Progress	Boss Peter
+	TT-090004	ENG_General Internal Meetings	28.11.2009	3 - Normal	In Progress	Boss Peter
+	TT-090007	ENG_Internal IT Tasks	31.12.2009	3 - Normal	In Progress	Help Frank
+	TT-090001	GER_Allgemeine interne Meetings	31.12.2009	3 - Normal	In Progress	Boss Peter
+	TT-090002	GER_Interne IT Aufgaben	31.12.2009	3 - Normal	In Progress	Help Frank
+	TT-090003	GER_Lizenzprüfung 2009	31.12.2009	2 - High	In Progress	Boss Peter
+	TT-110001	Ressourcenplanung 2012	31.12.2011	2 - High	In Progress	Boss Peter
+	TT-120001	Task Thread, angelegt aus "Aktive Task Thread Vorlage"	04.07.2012	3 - Normal	New	Boss Peter
+	TT-120004	VDE701	30.11.2013	3 - Normal	New	Boss Peter

- Completion of tasks (state „closed“)
- Automated completion of a thread of tasks as soon as all as all tasks related to a thread are closed

OMNITRACKER Task Management supports the generation of reports

- Tracking and analysing of own and deputed tasks
- Easy and flexible adaption of reports according to a user's needs

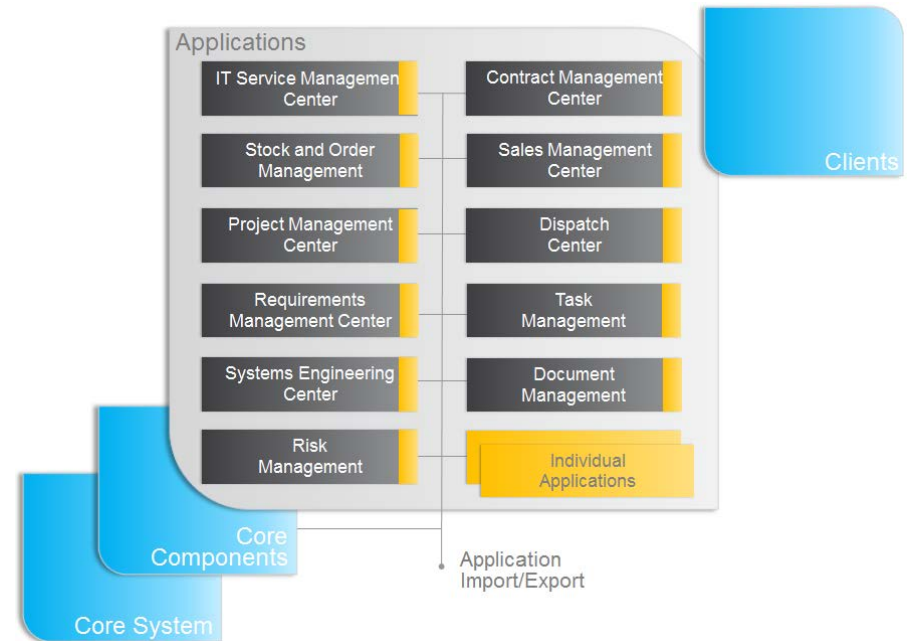
Task Thread: OMNITRACKER Documentation

Nummer	Endedatum	Priorität	Zustand	Verantwortlich
TT-080022	28.02.2009	3 - Normal	New	Superuser

Task-Überblick (sortiert nach Fälligkeit)

Nummer	Fällig am	Task Typ	Priorität	Zustand	Verantwortlich	Titel
T-80100063	24.11.2008	To do	3 - Normal	In Progress	Admin-Incident	Create new OMNITRACKER Project Management Center presentation
T-80100058	25.12.2008	Callback	3 - Normal	In Progress	Superuser	Update Presentation of OMNITRACKER ITSM Center
T-80100062	31.12.2008	To do	3 - Normal	Closed	User-Change	Create of ITSM Center White Paper

- Easy integration of OMNITRACKER Task Management in current OMNITRACKER installations
- Integrate further OMNITRACKER solutions, e.g. OMNITRACKER Sales Management Center



OMNINET GmbH

D-90542 Eckental
sales@omninet.de – <http://www.omninet.de>

OMNINET Austria GmbH

A-1030 Wien
sales@omninet.at – <http://www.omninet.at>

OMNINET Technologies NV/SA

B-3018 Leuven
sales@omninet.be – <http://www.omninet.be>

OMNINET Nederland

NL-2517 Den Haag
sales@omninet.nl – <http://www.omninet.nl>

OMNINET OOO (Russia and CIS)

RUS-Moscow 121099
sales@omninet.ru – <http://www.omninet.ru>

OMNINET GmbH (Schweiz)

CH-8808 Pfäffikon
sales@omninet.ch – <http://www.omninet.ch>

OMNINET USA

US-New York, NY 10011
sales@omninet.biz – <http://www.omninet.biz>

