Eaco Task Management

USER GUIDE

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Eaco

INDEX

INTRODUCTION

"Billions of people wonder, what am I supposed to do next? Boss, please tell me. I want to do a good job.

So, when people get to work, they're asking to be managed. Managed to do the right thing, the right work, in the right way because they want to make a contribution" **- Seth Godin**

One of the most challenging aspects of managing work is the pressure that comes with the compulsion to micromanage; an issue that is usually borne from a manager's fear of losing control.

Micromanagement has long been a thorn in the side of any business. Its damaging effects, from negative impacts on productivity to soaring levels of turnover in human resources, has resulted in irrecoverable losses for far too many organisations. Yet: the requirement to ensure that specific tasks are completed correctly to meet customer expectations, cannot be discarded.

It is consequences like these that highlight how technology can invariably bridge the need to maintain robust works management practices and at the same time protect a positive working culture. To address these critical organisational needs, Eaco's software suite includes a solution, Task Management, as one of its key offerings.
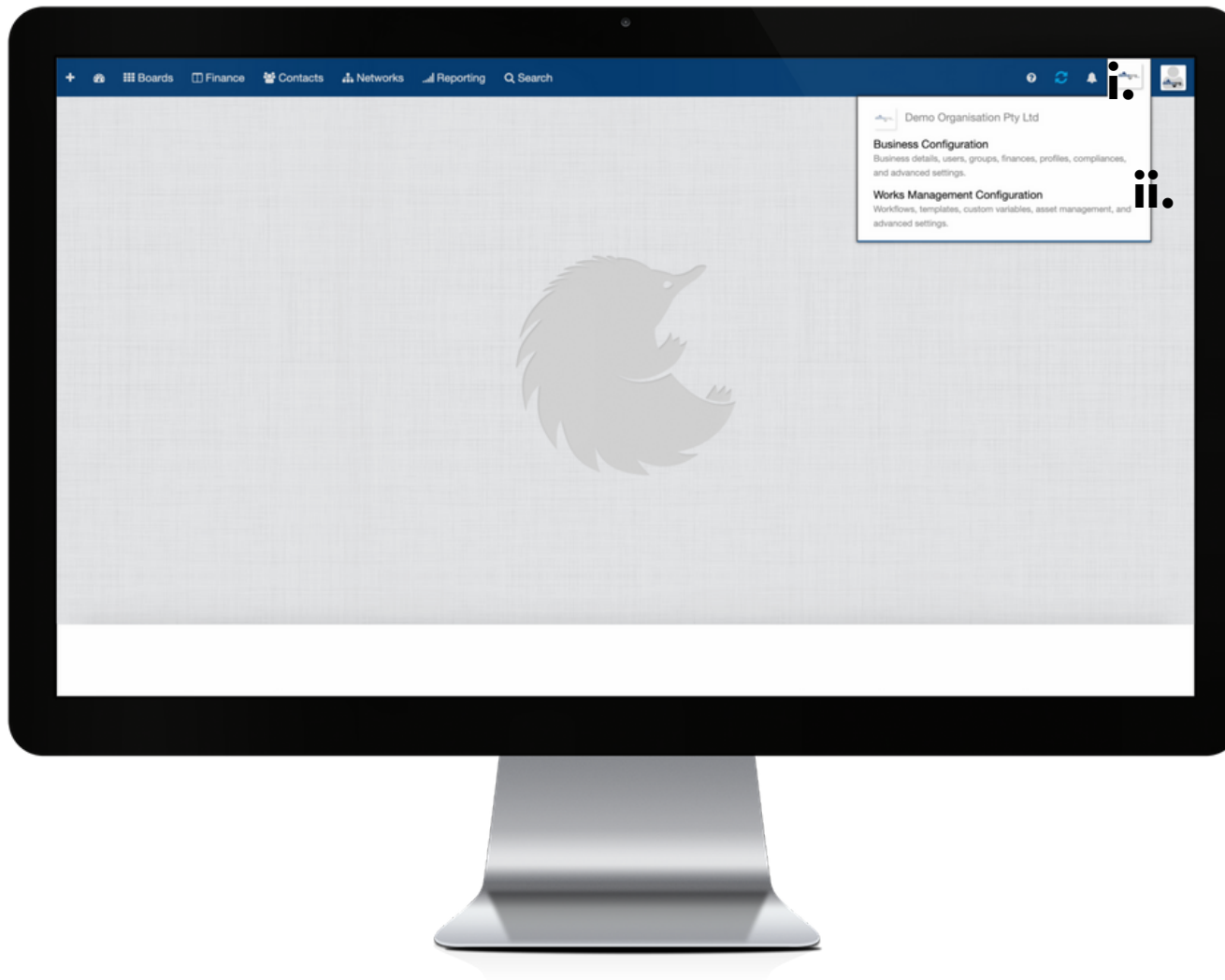
The Task Management feature has been designed to arm organisations with a tool that guides their workers on how to complete specific tasks of a job to ensure customer satisfaction.

#drivingsatisfaction
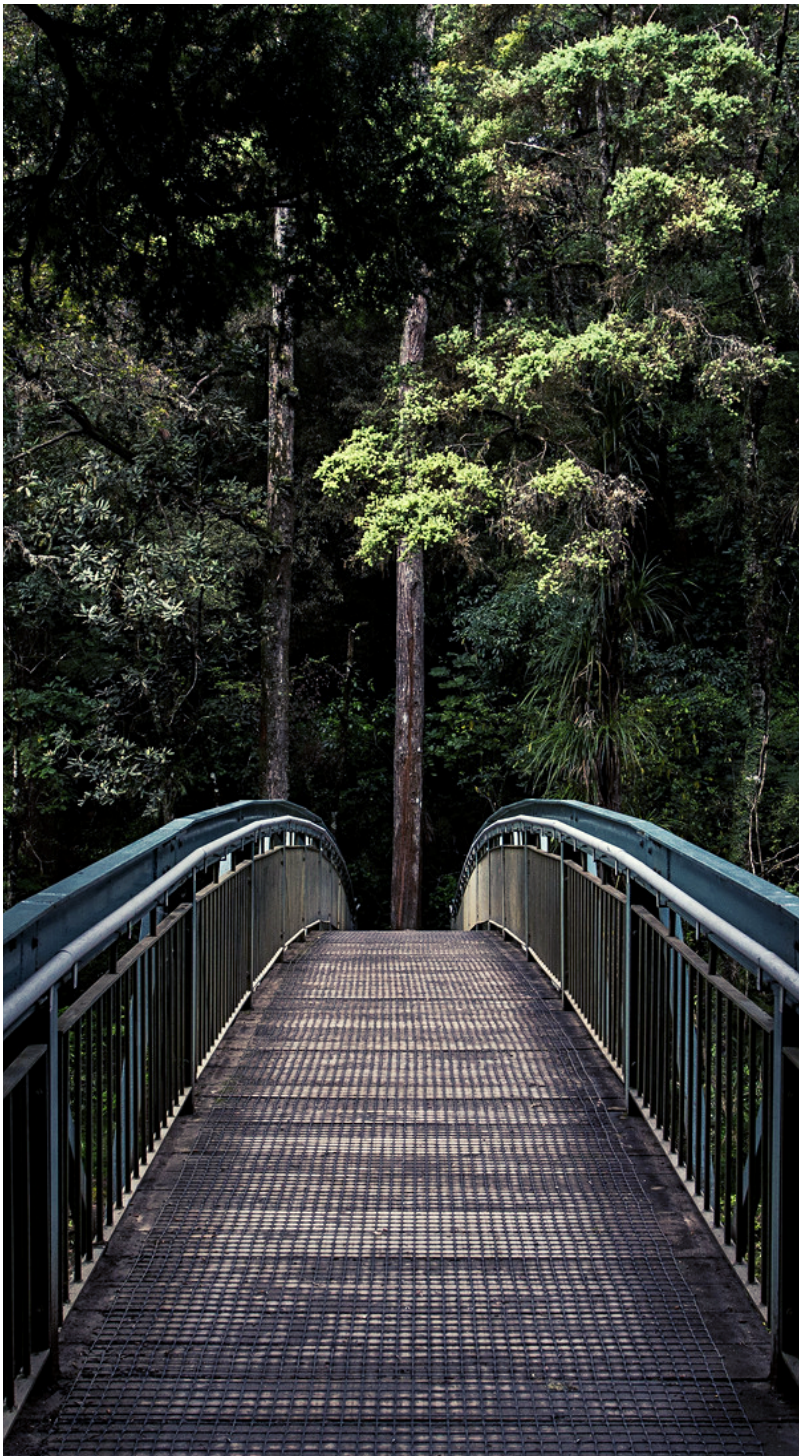
ESTABLISH, ACT,
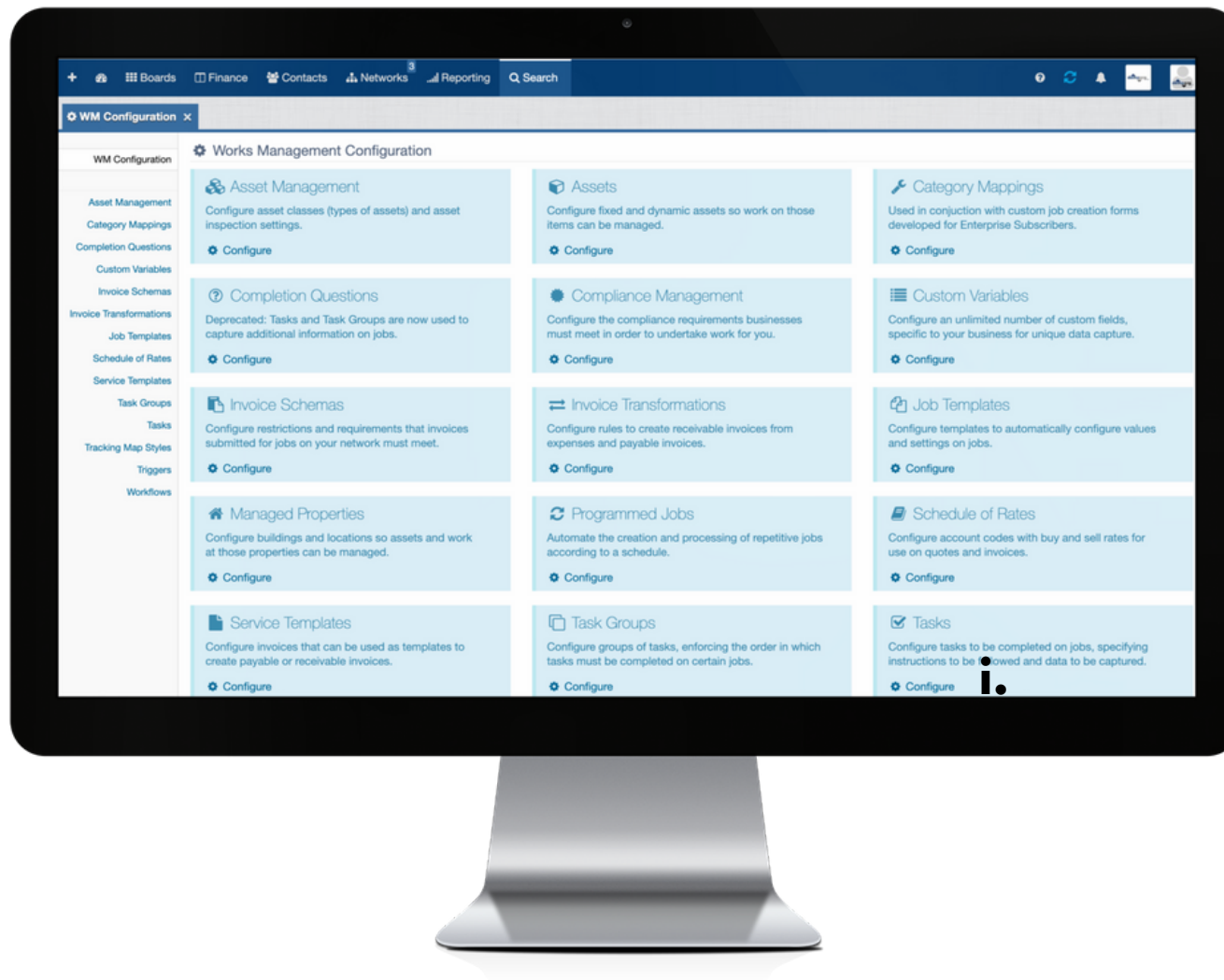COMMUNICATE AND
OPTIMISE

1. GET STARTED

Establish the settings for your Task Management feature via your organisation's Works Management Configuration (WM Configuration) section.

Your WM Configuration section can be found by clicking on the icon (**i**) for your Organisation's Profile and then selecting the Works Management Configuration from within the drop down menu (**ii**).
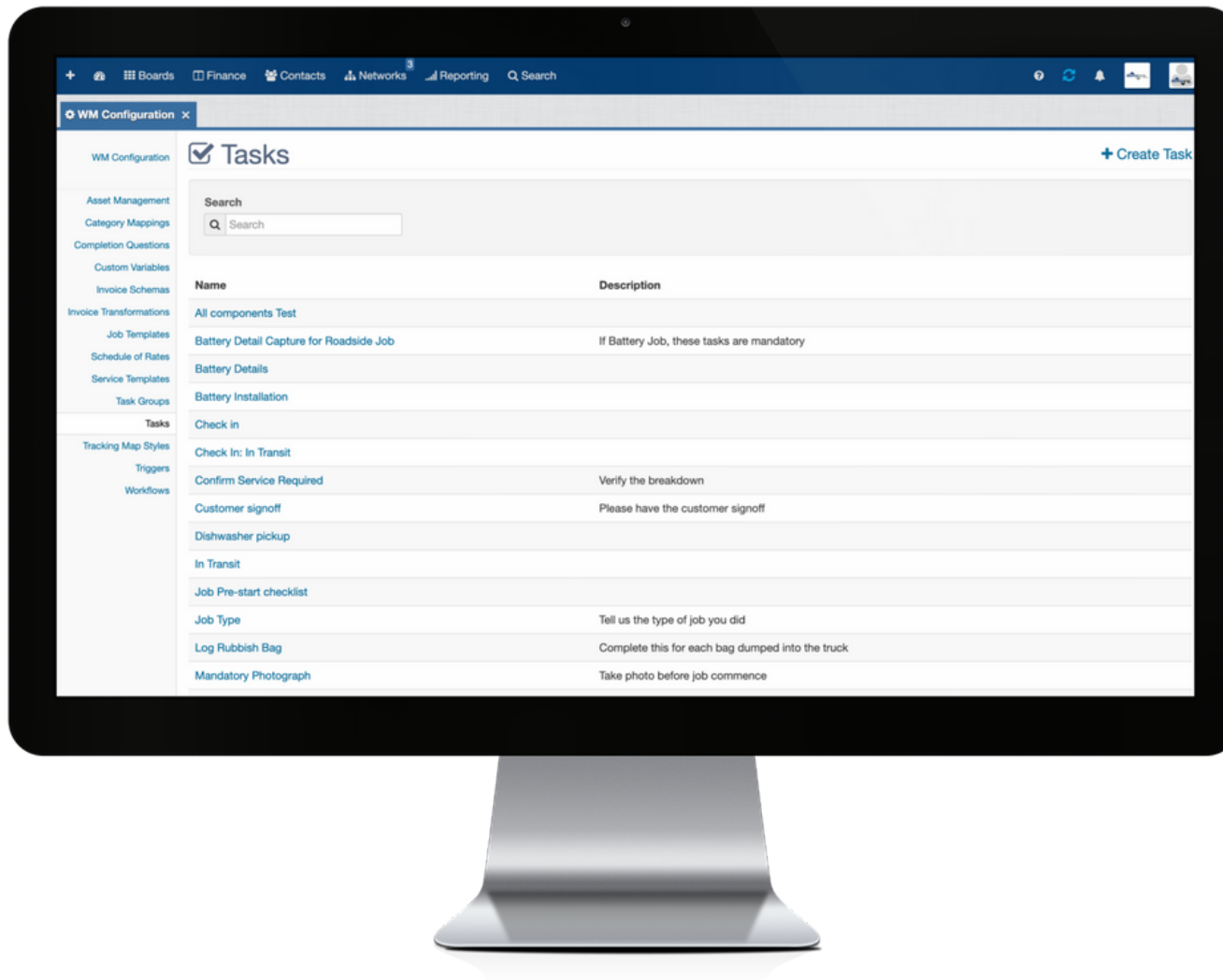
2. WM CONFIGURATION

i: To commence establishing the settings for your Task Management feature, click on Configure.

3. SETTINGS: MAIN VIEW

Legend:

Name: this is the Name of the Task.

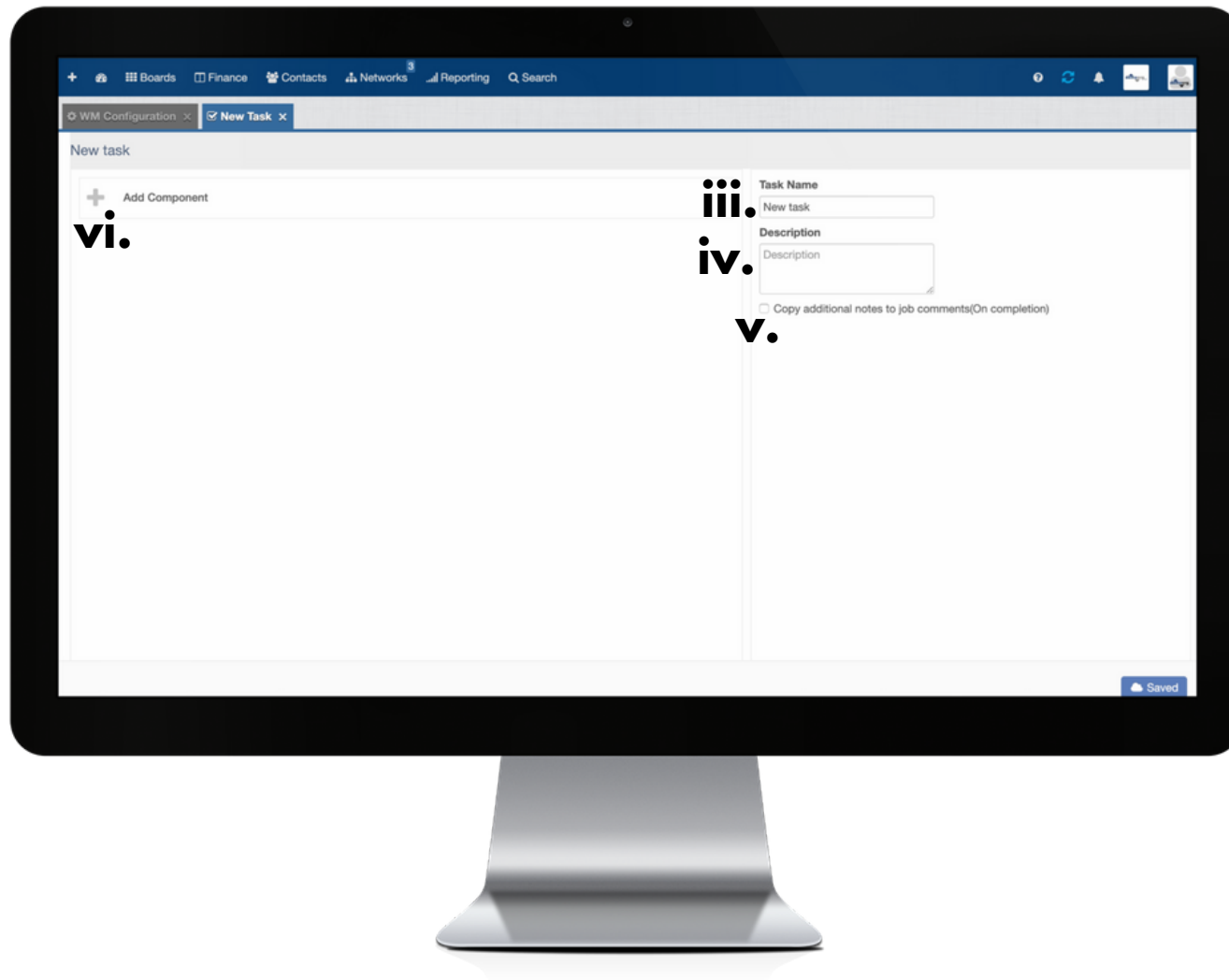**Description**: describes the Task to be executed.

4. CREATE A NEW/EDIT A TASK

i: click the + icon to open the create Task dialog box; or

ii: to edit the details of an existing Task, click the name to open the Task dialog box.

iii: complete this field to apply a Name to the Task.

iv: complete this field to describe the purpose of the Task.

v: check the box to enable the additional notes that are recorded at the time of completing the Task to attach to the job overview.

vi: click the + icon to open the Add Component dialog box (Steps 5 to 10).

Step vii: complete this field to indicate what type of result is to be recorded for completion of the Task.

Step viii: complete this field to apply a Name to the Task Component.

Step ix: complete this field to describe the purpose of the Task Component to be completed.

Step x: complete this field to provide additional information in relation to the Task Component to be completed.

Step xi: check this box if the Task Component is to be made mandatory for full completion of the overall Task.

Step xii: click the + icon to add another Component that is to form part of the overall Task completion.
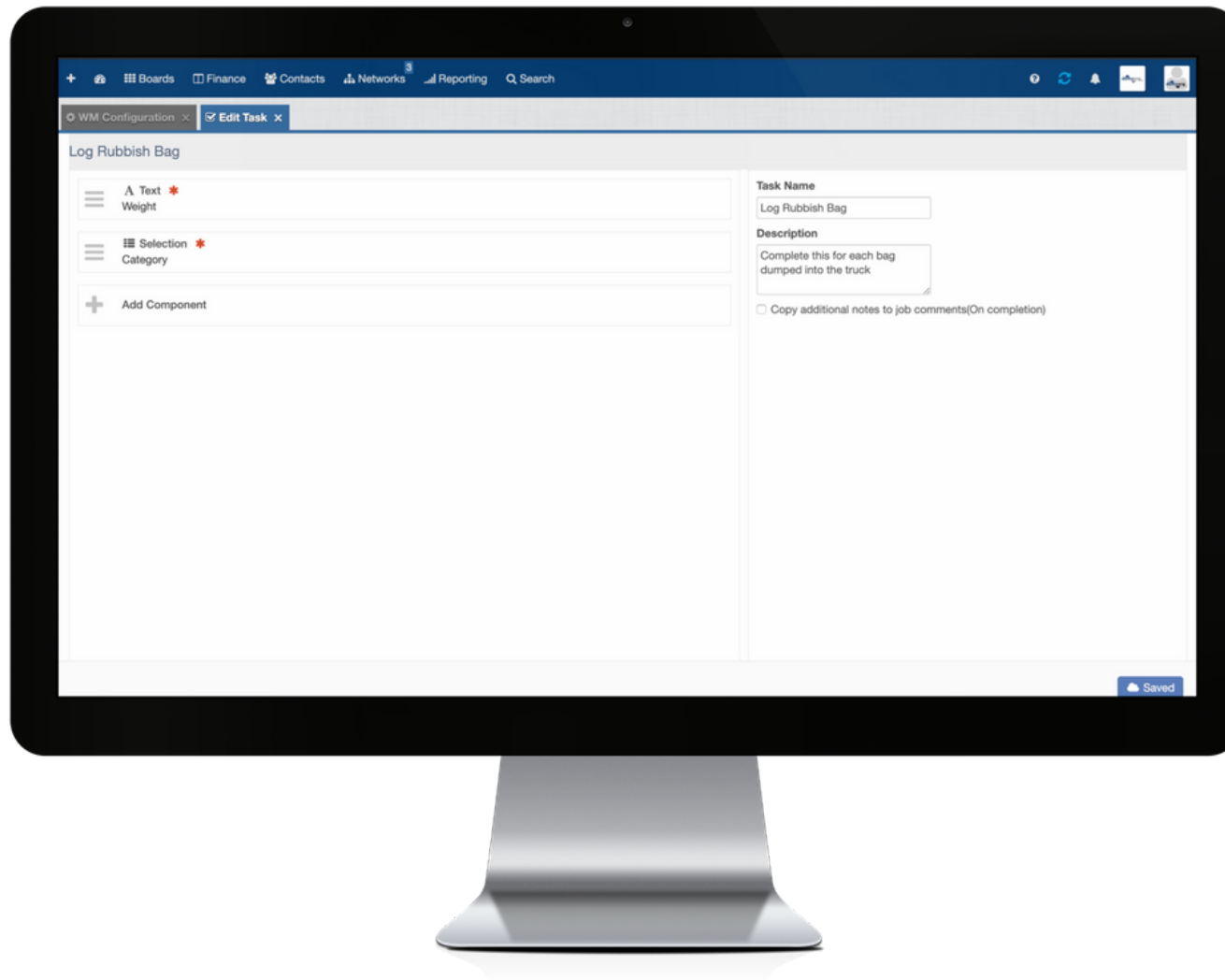
Step xiii: click Save to apply all settings.

5. VIEW OF A CREATED TASK

+ | 🏠 | ▦ Boards | ▥ Finance | 👥 Contacts | ⛓ Networks ³ | ⋰ Reporting | 🔍 Search | ❓ ⟳ 🔔 | | |

⚙ WM Configuration ✕ | ☑ Edit Task ✕

Log Rubbish Bag

☰	**A** Text ✲ Weight
☰	▦ Selection ✲ Category
✚	Add Component

Task Name

Log Rubbish Bag

Description

Complete this for each bag
dumped into the truck

☐ Copy additional notes to job comments(On completion)

☁ Saved

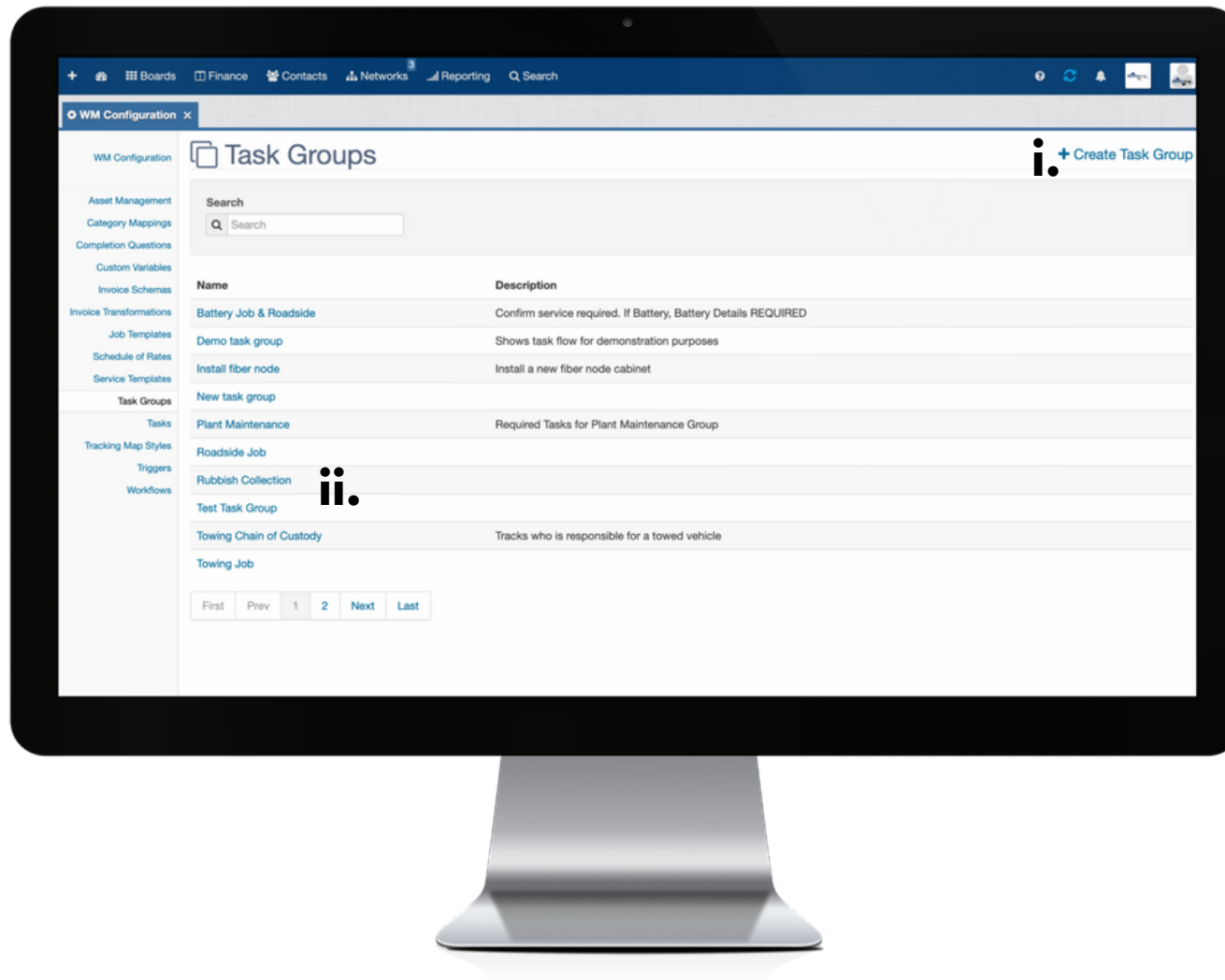# 6. TASK GROUPS SETTINGS: MAIN VIEW
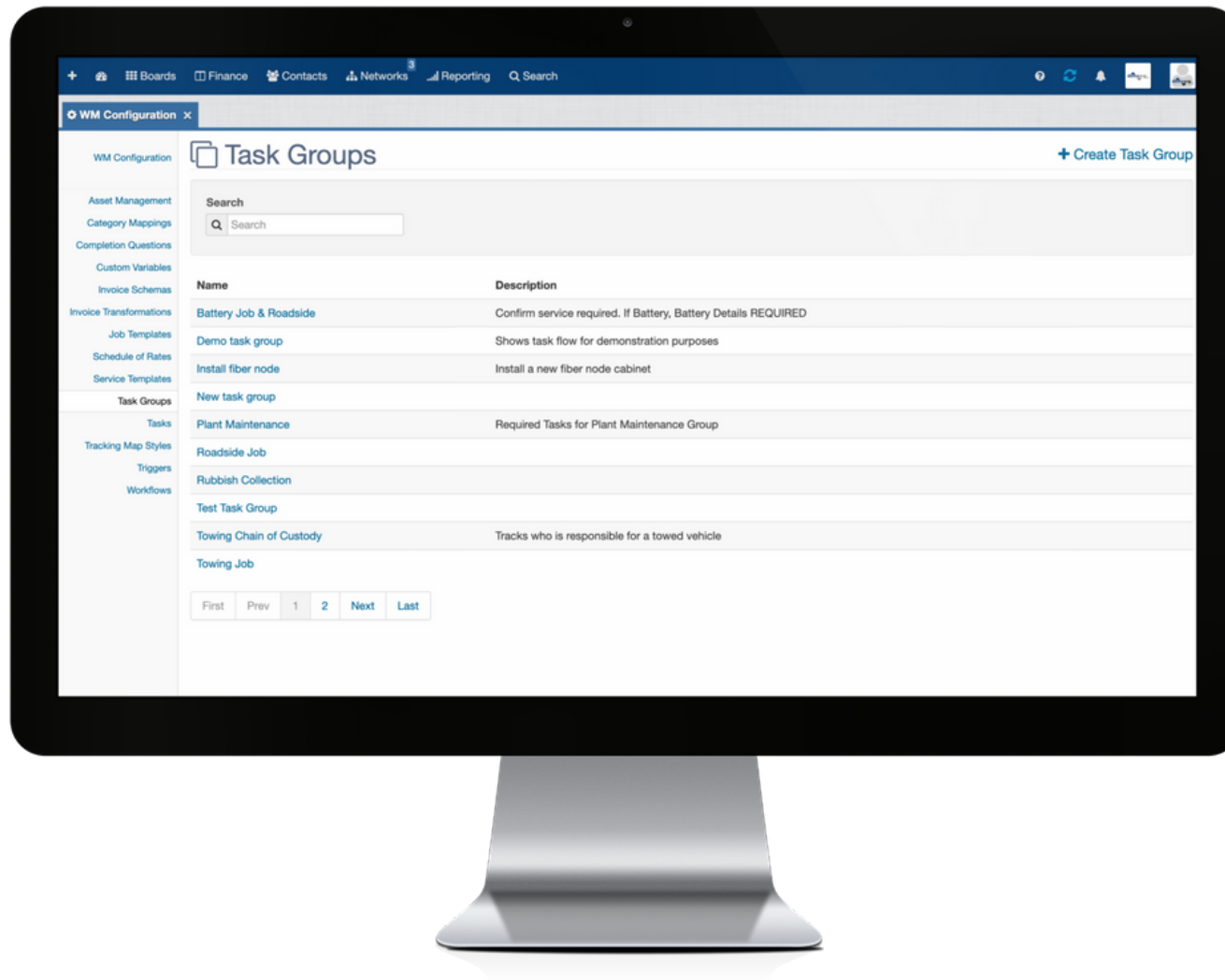
Legend:

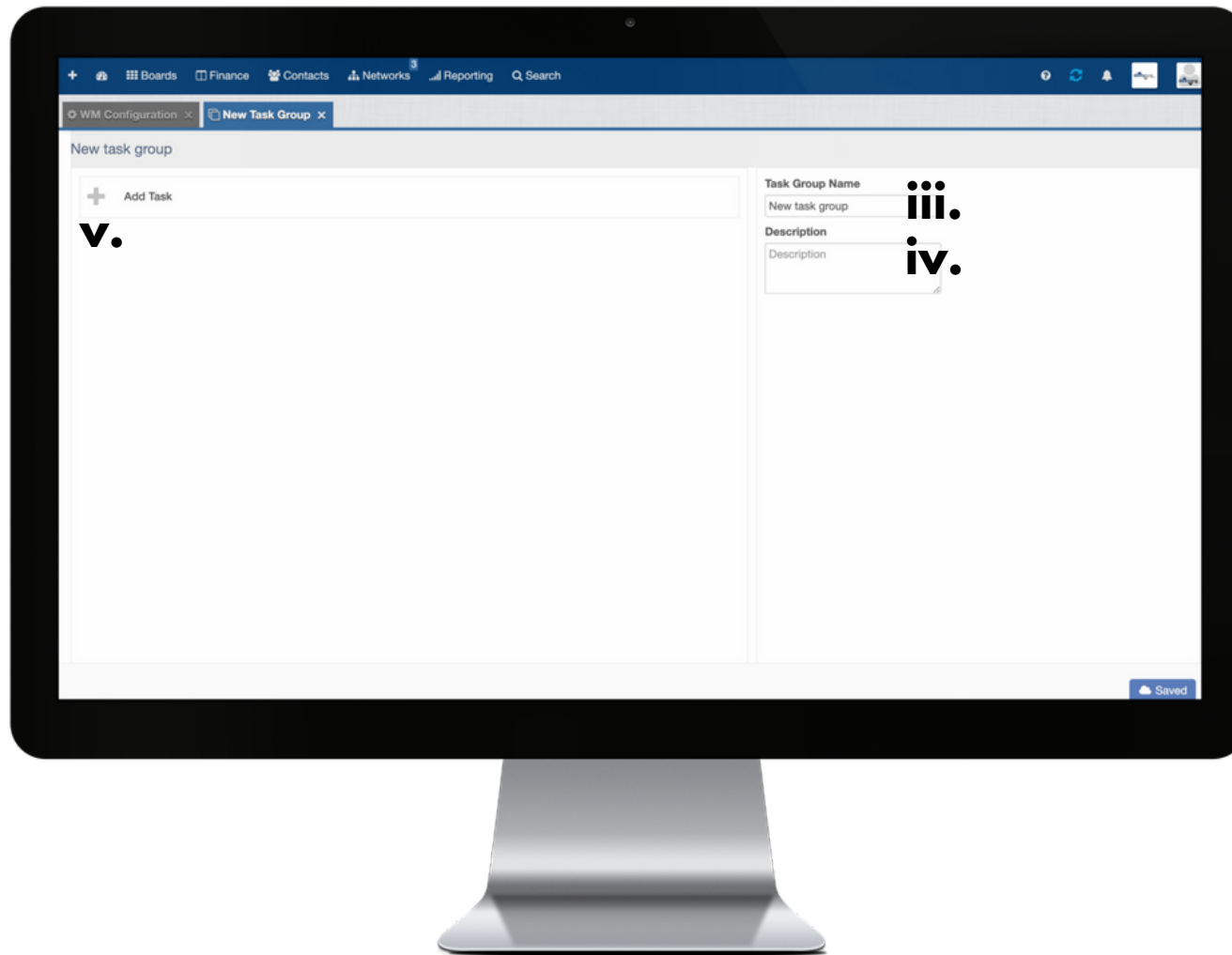**Name**: this is the Name of the Task Group.

Description: describes the Task Group to be executed.

ESTABLISH, ACT, COMMUNICATE AND OPTIMISE

7. CREATE A NEW/EDIT A TASK GROUP

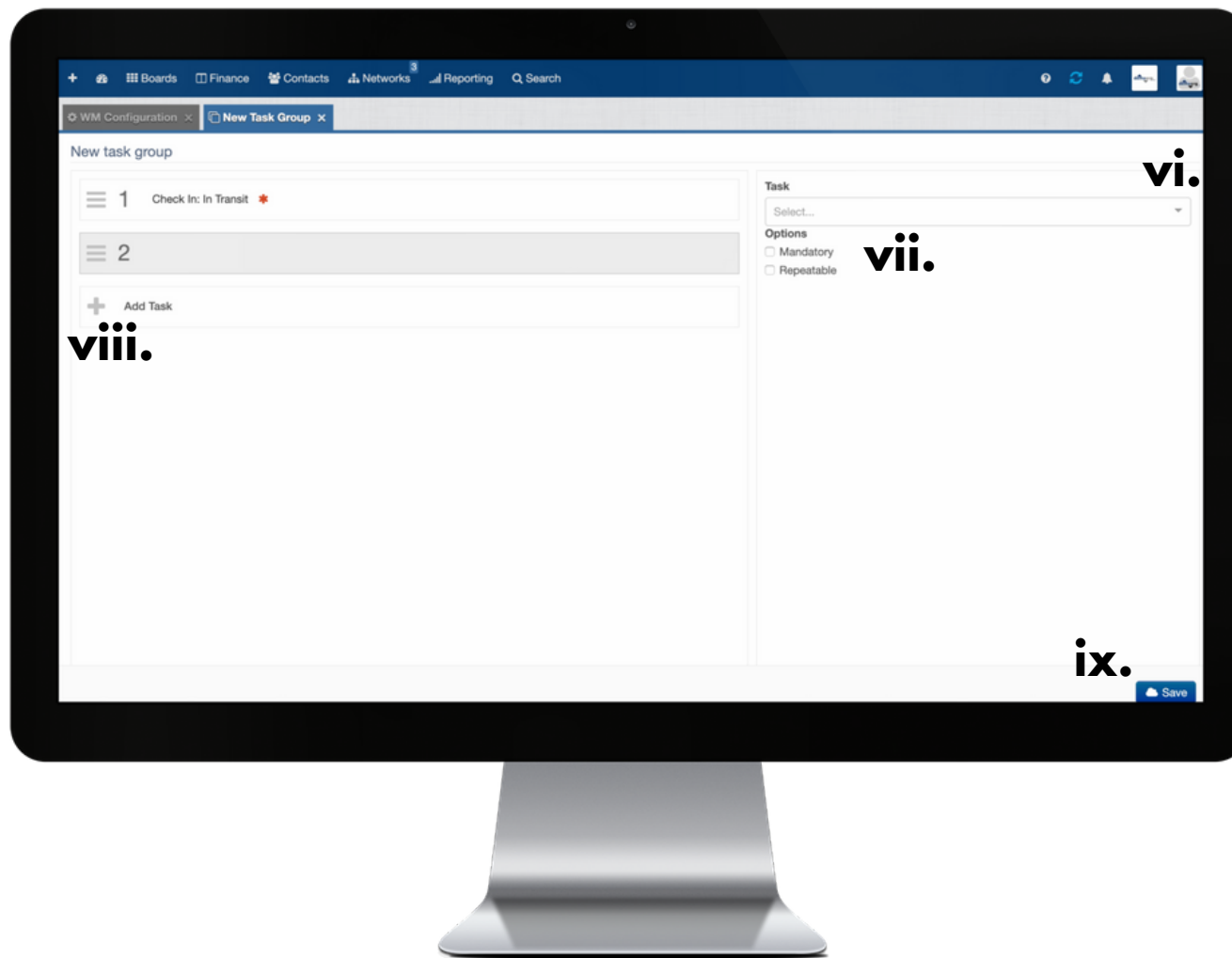**i**: click the + icon to open the create Task Group dialog box; or

ii: to edit the details of an existing Task Group, click the name to open the Task Group dialog box.

iii: complete this field to apply a Name to the Task Group.

iv: complete this field to describe the purpose of the Task Group.

v: click + icon to Add a Task to the Task Group and then move on to Step vi.

vi: upon clicking Add Task, use this drop down menu to select which Task to add to the Task Group from your list of Tasks. Once added, the Task will appear in numbered order as seen in the top left of this screen.

vii: check boxes here enable you to establish whether the Task should be Mandatory and/or Repeatable.

viii: repeat Steps v to vii to continue adding more Tasks to the Task Group.

ix: click Save to confirm attachment of Tasks to the Task Group.

8. VIEW OF A CREATED TASK GROUP

+   🏠   ⦂⦂⦂ Boards   ▭ Finance   👥 Contacts   ⛓ Networks ³   ⬛ Reporting   🔍 Search   ❓   🔄   🔔

⚙ WM Configuration ✕   📄 **Edit Task Group** ✕

Plant Maintenance

		Task Group Name
☰	**1** Check in ✱	Plant Maintenance
		Description
☰	**2** Mandatory Photograph ✱	Required Tasks for Plant Maintenance Group
☰	**3** Customer signoff ✱	
➕	Add Task	

☁ Saved