

Task Management - Workflow FAQ

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What is a Workflow?

- A Workflow is a series of sequential tasks that are carried out to execute the steps of a business process. It is a collection of data, rules, and tasks that need to be completed to achieve a certain business outcome. A process workflow happens when the set of tasks is predictable and repetitive. This means that before an item begins the workflow, you know exactly what path it should take.
- Workflows are used to consistently manage common business processes within an organization, and improve organizational efficiency and productivity by managing the tasks and steps involved in business processes.

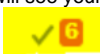
What is a Workflow Task?

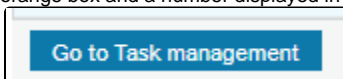
- Any workflow event that requires human interaction is represented by a workflow task. When a workflow assigns a task to a workflow participant, the task recipient can either complete that task or request changes and push the task back to its originator.
- When a workflow participant completes a workflow task or requests a change to the workflow, the workflow moves to the next relevant step.

What is a Task List?

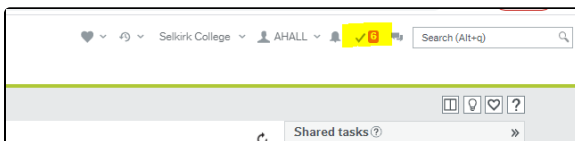
A Task List is a collection of outstanding Tasks (i.e. Actions) assigned to a specific user or role by a workflow or series of workflows.

A Task List How-To

- In the upper right hand corner of your Unit4 screen, you will see your tasks indicated with an orange box and a number displayed in that box. Click on  then click on



to open your **Task Management** screen.



- In the new window, your tasks will be summarized along the left-side column in a series of boxes.

The screenshot shows a web application titled "SK Task management". It features a search bar at the top. On the left, there's a sidebar with filters for "All tasks", "Today", "Tomorrow", and "Overdue". Below these are "Group by" options: "Step" (selected) and "Process". Under "Step", there are two categories: "Absence: Approval" with a count of 1 (indicated by an orange box with the number 1) and "Division: Approval" with a count of 5 (indicated by an orange box with the number 5). The main table displays tasks with columns: Client, Process name, Workflow step, and Task data. The first row is highlighted in blue and shows "SK", "Absence Approval", "Absence: Approval", and "Resource Name: Daley, Kari". Subsequent rows show "SK", "In PREV Travel Request STEP 1", "Division Approval", and empty task data.

Client	Process name	Workflow step	Task data
SK	Absence Approval	Absence: Approval	Resource Name: Daley, Kari
SK	In PREV Travel Request STEP 1	Division Approval	
SK	In PREV Travel Request STEP 1	Division Approval	
SK	In PREV Travel Request STEP 1	Division Approval	
SK	In PREV Travel Request STEP 1	Division Approval	
SK	In PREV Travel Request STEP 1	Division Approval	

In the above example:

- **"Absence Approval"** displays an orange boxed "1", indicating that I have one Absence Approval to approve.
- **"Division Approval"** displays an orange box "5" alert, indicating that I have five purchase requisitions to approve.

Note - purchase requisition functionality is scheduled for summer release, and is not available at this time. Shown here to illustrate the possible categorization of different tasks.

Why am I getting task notifications from Unit4 in my personal email inbox?

If you have your personal email recorded as your preferred email in your contact information screen, then Unit4 will use the designated email as the primary source of communication. Please login to Unit4, access your contact information through the My Personnel information screen, and update your email to be your selkirk.ca email.

Why am I seeing so many tasks?

- Tasks enable the people who perform these tasks to concentrate on performing the work rather than managing the workflow. While an automated workflow removes the hard copy paper or email from your inbox, it will generate a task instead. The work isn't increasing, it's just shifting visibility from one area to another. PS. The new system organizes for you and sends you alerts of new tasks, and reminders of outstanding items in your task list!
- To help manage the volume of tasks in your task list, our team has enabled aggregated lists where multiple requests come from one individual source (*i.e. 5 Absence requests from Jane Doe appear as 1 task*).

Why is it important for me to look at and stay on top of my tasks?

- Allowing your task list to grow will result in stress, overload and burn-out. Managing tasks on a regular basis is critical to avoiding a "pileup".
- Ignoring or failing to review tasks regularly results in a blocked workflow. The process (*i.e. purchase requisition, payroll*) can't move forward until your step is completed.

How can I prevent my task list from getting out of control & overwhelming?

- Prioritize - Consider more imminent tasks first (*i.e. timesheet approval*), and move through your list in order of priority.
- Don't Hide - In an automated system, workflow tasks will become a way of life for managers with approval responsibilities. Deferring scheduled tasks will result in overload.
- Set aside time - Block your calendar for a dedicated chunk of time 1 - 2 x / week, set aside specifically to review and complete tasks.