

**Welcome
to the
Wisconsin
Skyward
Users
Group**

TASK MANAGER Examples & Ideas

Task Manager

OVERVIEW

Task Manager allows customer to create user defined process to be completed by users in the system.

Each process will contain tasks that need to be completed and the user(s) responsible for completing the tasks.

As each task is completed the system can send email notifications to the user(s) responsible for completing the next task in the process.

Task Manager

Employee New Hire Process

One of the most popular uses for Task Manager is to setup a process for hiring new employees. This allows the district to be certain that each necessary step of adding a new individual is completed in accordance to district policy. This also gives administrators a central project – the Process – to view the statuses of each step of the task.

Employee New Hire Process

Task Manager

SKYWARD

Home Skyward Contact Access System Administration Data Administration Student Management Human Resources Financial Management Employee Access Task Manager

Step Maintenance !!Adding a New Employee

! [Calendar] [Camera] [Favorites] [New Window] [My Print Queue]

Views: General Filters: *Skyward Default

Seq	Task Summary	Assign To	Reference Program	Custom Score
1	Upload Documents for HR	Process's Initiator		
2	Add Employee to Skyward	HR		
3	Add Staff Assignment	AARONSONSCR, SAU	Employee Administration	
4	Assignment Export/Payroll Imp.	ABEITASCR, ZENIA G	Assignment Export/Payroll Ir	
5	Add Elective Benefits	PR & BEN	Employee Profile	
6	Add Elective Deductions	PR & BEN	Employee Profile	
7	Add Time Off	Process's Initiator	Employee Profile	
8	Maintenance - Create Key Card	Process's Initiator		
9	Setup Network Information	TECHNOLOGY		

Add
Edit
Delete
Validate



How to get There!

Task Manager

The screenshot shows the Skyward system navigation menu. The menu items are: Home, Skyward Contact Access, System Administration, Data Administration, Student Management, Human Resources, Financial Management, Employee Access, and Task Manager. A red arrow labeled '1' points to the 'System Administration' menu item. A second red arrow labeled '2' points to the 'Task Manager' menu item. A third red arrow labeled '3' points to the 'Tasks - TK' item within the 'FIN/HR Tasks - FH' category. Below the menu, there are two task categories: 'FIN/HR Tasks - FH' and 'Student Tasks - ST'. Each category contains three items: 'Processes - PR', 'Tasks - TK', and 'View Tasks - VT'. At the bottom of the page, there is a notification that says 'You do not have any unread notifications'.

Adding a Process

Task Manager








Process Maintenance

Process Maintenance

Area:

* Process Short Description:

* Process Description:

Icon:        None

LEAVE UNCHECKED Active - Allows tasks to be created off of this process

Selected Organization Chart:

Instructions:

* Subject Selection: Assign Initiator as Subject
 Allow Subject to be selected from list of Employees
 Allow Subject to be entered as free form text

Asterisk (*) denotes a required field

Adding Steps

Task Manager

Adding a Step

SKYWARD

Home Skyward Contact Access System Administration Data Administration Student Management Human Resources Financial Management Employee Access Task Manager

Processes ☆

Views: General Filters: Skyward Default Clone

Process Status: [blank] = Active I = Inactive

Area ▲	Description	Status	Organization Chart
▶ Employee	!!Adding a New Employee	I	
▶ Employee	!!COVID VACCINATION/WEEKLY TESTING RESULTS		
▶ Employee	!Change Voluntary Ded 2		Organization Chart
▶ Employee	!Change Voluntary Deduction		
▶ Employee	!Demo Adv Custom Form		
▶ Employee	!employee test only		
▶ Employee	!EMPLOYEE TRANSFER REQUEST		

Add Edit Delete Clone Step Maintenance View Tasks

Favorites New Window My Print Queue

Adding Steps

Task Manager

Adding
a Step

The screenshot displays the Skyward software interface. At the top, the 'SKYWARD' logo is visible. Below it is a navigation menu with tabs for Home, Skyward Contact Access, System Administration, Data Administration, Human Resources, Financial Management, Employee Access, and Task Manager. The 'Task Manager' tab is selected. Below the navigation menu, the page title is 'Step Maintenance' with a sub-title 'Adding a New Employee'. To the right of the title are icons for Favorites, New Window, and My Print Queue. Below the title, there are 'Views: General' and 'Filters: *Skyward Default' dropdown menus. On the right side of the page, there is a vertical toolbar with buttons for 'Add', 'Edit', 'Delete', and 'Validate'. The 'Add' button is highlighted with a red rectangular box. The main content area below the toolbar is empty and contains the text: 'There are no records to display; check your filter settings.'

Task Manager

Adding a Step

Process Step Maintenance



Process Step Maintenance

Save
Back

* Parent: [Root Node]

* Assign To: Process's Initiator

Step Information

* Task Summary: Upload Documents for HR

* Instructions: 1) Attach the new hire's W4.
2) Attach the new hire's ID document.
3) Attach the new hire's signed contract.
4) Attach the new hire's selected benefits.

* Next Step Choice: Choose One
 Choose Multiple
 Create All

Use Sub Steps

Reference Program: [Dropdown] [?] More

Custom Form/Screen: [Dropdown] [?] More

NOTE: Only One-to-Many Custom Screens may be selected.

Step Options

If this step is completed all steps at this level are completed. [?]

Notification Options

Send Notifications for this step.

Asterisk (*) denotes a required field

Task Manager

Adding
a Step

Adding Next Steps

Process Step Maintenance

Process Step Maintenance

* Parent: Upload Documents for HR

* Assign To: [Select a Group]

Group Selection: Human Resources Departm

Save

Back

Step Information

* Task Summary: Add Employee to Skyward

* Instructions: 1) Add the Employee record.
2) Assign the new Employee record as the subject of this process.

* Next Step Choice: Choose One
 Choose Multiple
 Create All

Use Sub Steps

Sub Steps

Sub Step ▲	Description
S0002-01	Add Employee
S0002-02	Change Subject

Add

Edit

Delete

Move Up

Move Down

2 records displayed

NOTE: Only One-to-Many Custom Screens may be selected.

Step Options

Allow Subject to be assigned during this step

If this step is completed all steps at this level are completed. ?

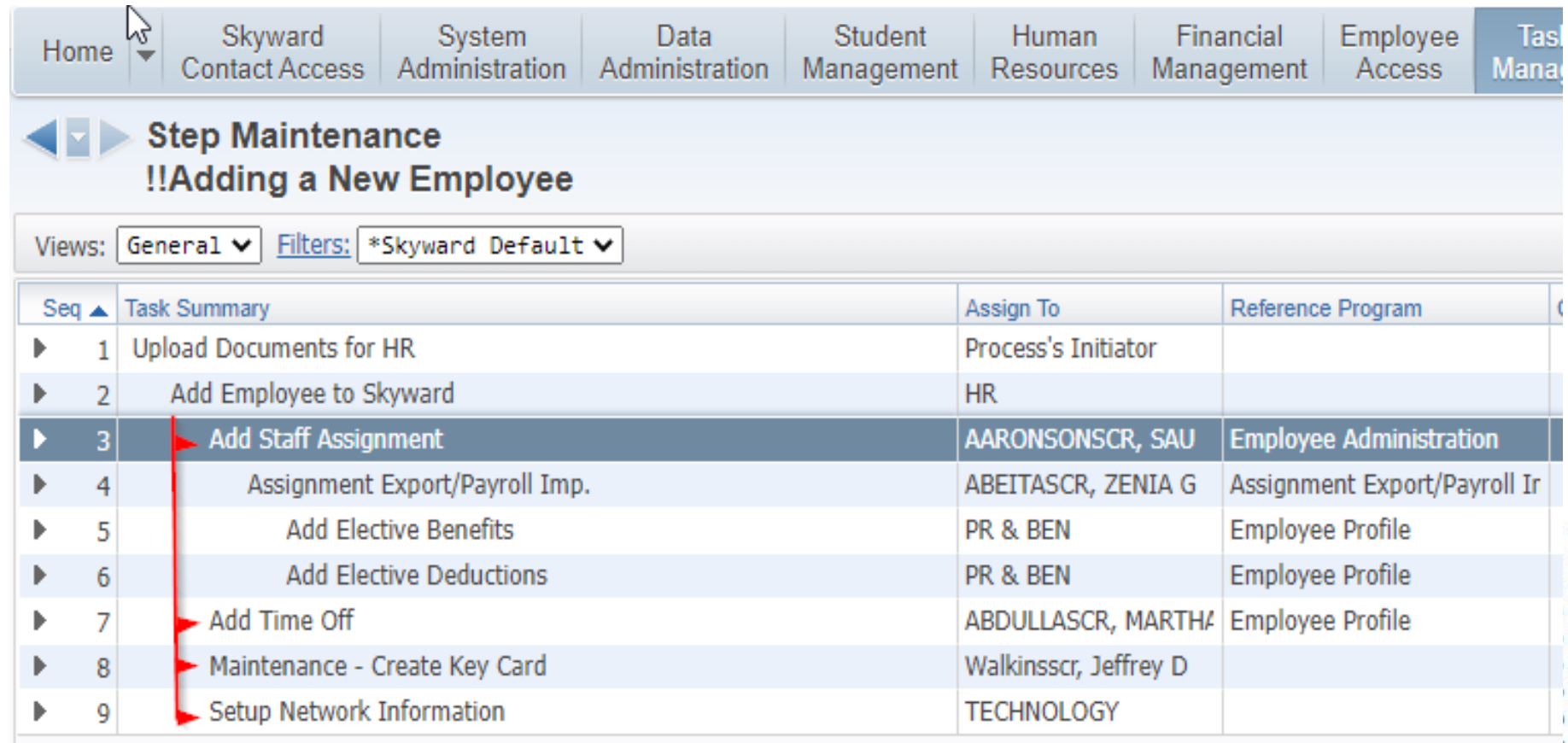
Sub Steps are consecutive steps completed by the same individual

Create All Option

This alignment indicates that all these steps are assigned to the Parent step above them all – “Add Employee to Skyward.”

Task Manager

Adding a Step



Home Skyward Contact Access System Administration Data Administration Student Management Human Resources Financial Management Employee Access Task Manager

Step Maintenance
!!Adding a New Employee

Views: General Filters: *Skyward Default

Seq	Task Summary	Assign To	Reference Program
▶ 1	Upload Documents for HR	Process's Initiator	
▶ 2	Add Employee to Skyward	HR	
▶ 3	Add Staff Assignment	AARONSONSCR, SAU	Employee Administration
▶ 4	Assignment Export/Payroll Imp.	ABEITASCR, ZENIA G	Assignment Export/Payroll Ir
▶ 5	Add Elective Benefits	PR & BEN	Employee Profile
▶ 6	Add Elective Deductions	PR & BEN	Employee Profile
▶ 7	Add Time Off	ABDULLASCR, MARTHA	Employee Profile
▶ 8	Maintenance - Create Key Card	Walkinsscr, Jeffrey D	
▶ 9	Setup Network Information	TECHNOLOGY	

Task Manager

Review

Review

- Process Initiator Uploads and attached document necessary to complete the process.
- Someone from HR Adds the Employee to Employee Profile and assigns them as the Subject of this process.
- Steps 3, 7, 8 and 9 all take place simultaneously as their parent (previous step) was set to create all steps beneath them.
- Once step 3 is complete – Step 4 Creates the Contracts and Pay Records Using the Export/Import Process.
- Steps 5 & 6 finish the process by adding Elective Benefits to Employee's Profile and Primary Pay Record.

Home	Skyward Contact Access	System Administration	Data Administration	Student Management
Step Maintenance !!Adding a New Employee				
Views: <input type="text" value="General"/> Filters: <input type="text" value="*Skyward Default"/>				
Seq ▲	Task Summary	Assign To		
▶ 1	Upload Documents for HR	Process's Initiator		
▶ 2	Add Employee to Skyward	HR		
▶ 3	Add Staff Assignment	AARONSONSCR, SAU		
▶ 4	Assignment Export/Payroll Imp.	ABEITASCR, ZENIA G		
▶ 5	Add Elective Benefits	PR & BEN		
▶ 6	Add Elective Deductions	PR & BEN		
▶ 7	Add Time Off	ABDULLASCR, MARTHA P		
▶ 8	Maintenance - Create Key Card	Walkinsscr, Jeffrey D		
▶ 9	Setup Network Information	TECHNOLOGY		

Task Manager

Possibilities

Possibilities are Plentiful!

Employee Termination Process

1. Updating the Leave History section of the Employee Profile.
2. Inactivating the employee's profiles (Employee, Security, Vendor).
3. Removing/inactivating security across the district.
4. Any necessary paperwork and its submission.

Purchasing Process

1. Add a Requisition
2. Submit Req for approval
3. Fully Approved Requisition becomes a PO.
4. Batch Update the PO
5. Print PO and send to vendor.
6. Receive Items from Vendor.

Accounts Payable Process

1. Add Invoice to Skyward
 1. Tie to PO
 2. Attach files to Invoice
2. Batch Update Invoice
3. Check Processing
4. Mail Checks / Send ACH file.

Task Manager

Possibilities

Possibilities are Plentiful!

Create Processes to guide users through day-to-day processes, allowing back-up employees to have step-by-step guides reminding them what they should do.

Employee's request for change to Deduction Amounts for additional federal, ACH deductions, etc.

Process tied to scheduled HR Data Mining report looking for certifications that are about to expire.

- a. Create a simple process that has a step assigned to a specific person or department instructing the employee(s) to review the scheduled report for employees with Certifications that may soon expire.
- b. Create an Employee Data Mining report on certified employees and add the Process to the Task Manager tab of the report's setup.
- c. Schedule the report to run monthly and email the report to the specific employee or group that will be assigned tasks from the Process.
- d. You can also leave the Initiator blank on the HR Data Mining report, which will cause this process to be initiated for all employees that were included in the report.

Any scheduled HR Data Mining Report can be assigned a process that contains filing steps or procedures for reviewing the document.

**Task
Manager**



makeameme.org