Welcome to the Wisconsin Skyward Users Group

TASK MANAGER Examples & Ideas

OVERVIEW

Task Manager

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.
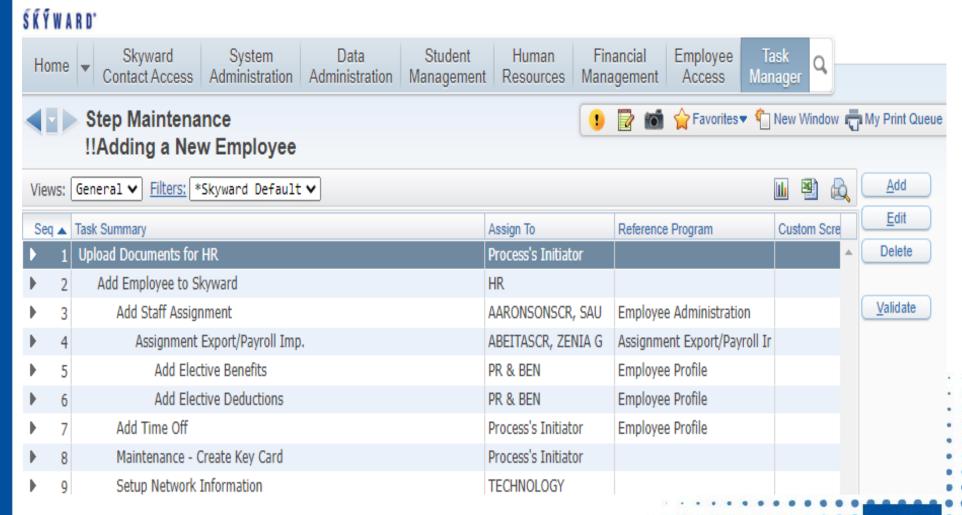
Employee New Hire Process

Task Manager

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 distract policy. This also gives administrators a central project – the Process – to view the statuses of each step of the task.
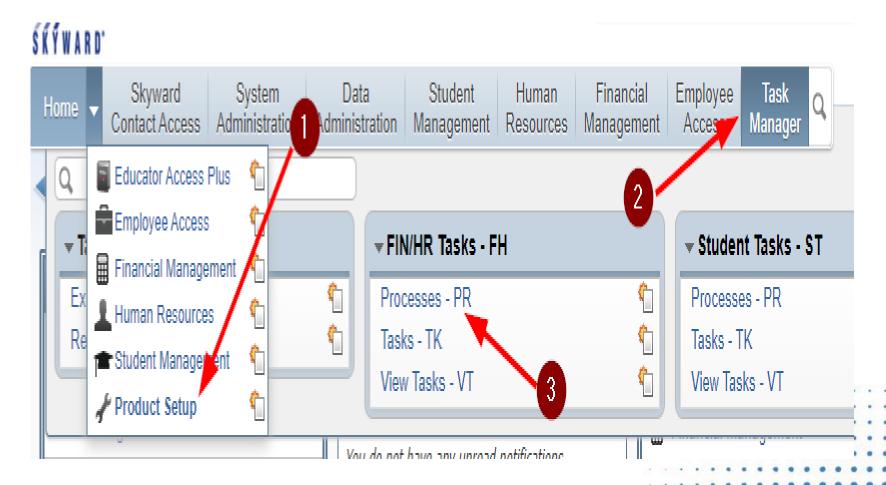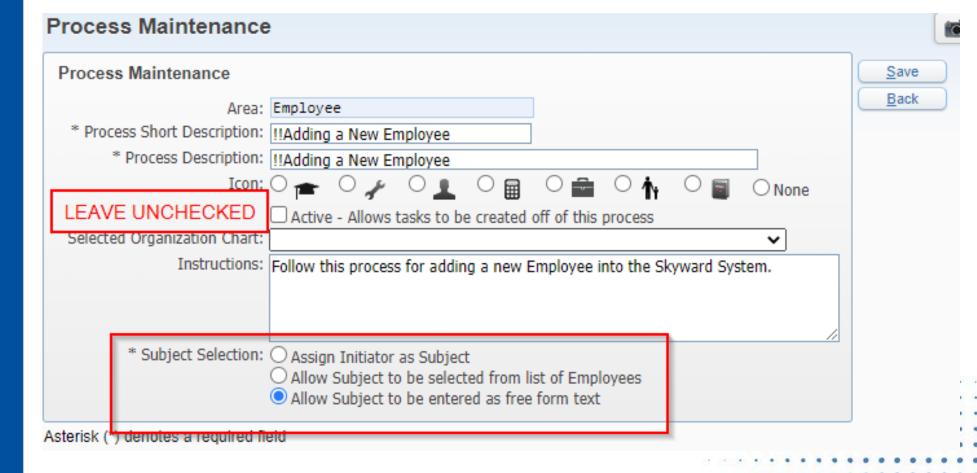
Employee New Hire Process
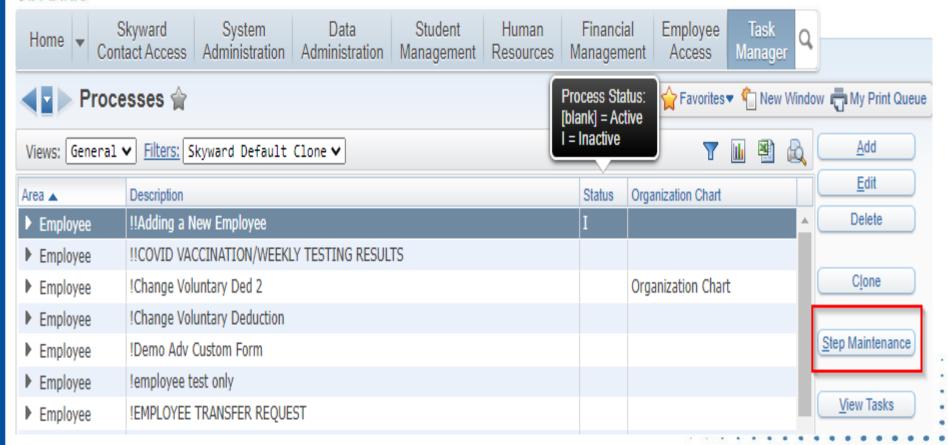

Task Manager

How to get There!

Task Manager

Adding a Process

Task Manager

Adding Steps

Task Manager

Adding a Step

Adding Steps

Task Manager

Adding a Step

Task Manager

Adding
a Step

Process Step Maintenance

Process Step Maintenance

* Parent: [Root Node]

* Assign To: Process's Initiator

Save

Back

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: [   ] [?] [More]

Custom Form/Screen: [   ] [?] [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
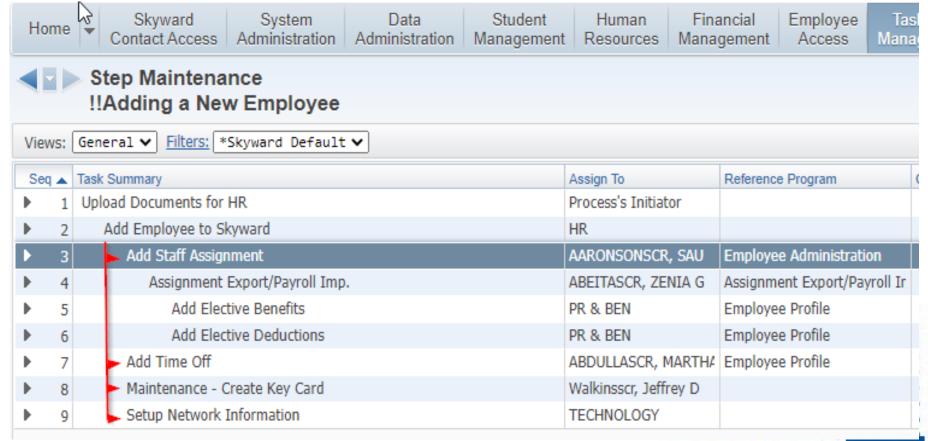
Adding
a Step

Adding Next Steps

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

Review

Task Manager

Review

- Process Initiator Uploads and attached document necessary to complete the process.

- Someone from HR Adds the Employe 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 Manageme

Step Maintenance
!!Adding a New Employee

Views: [General ▼] Filters: [*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

SKYWARD

Possibilities are Plentiful!

Task Manager

Possibilities

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.

Possibilities are Plentiful!

Task Manager

Possibilities

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.

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Task Manager