

# Task Manager Examples and Ideas

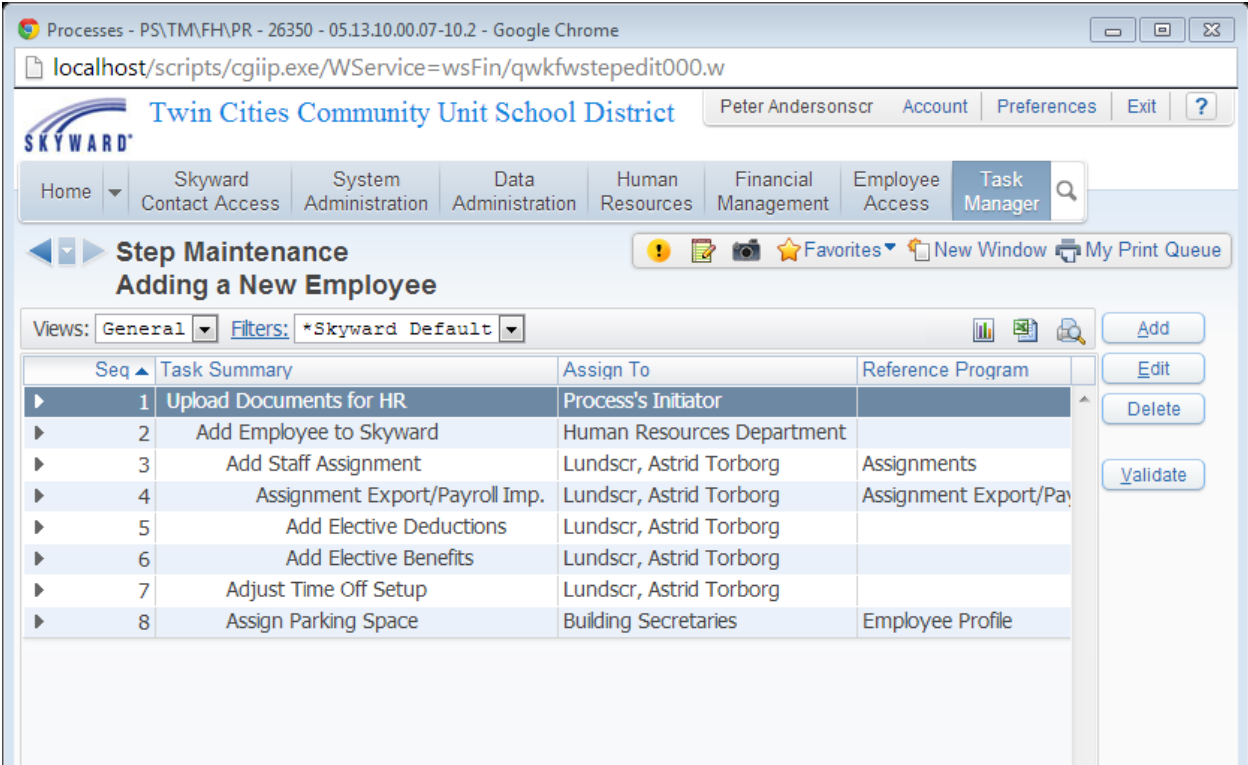
Task Manager is Skyward's free tool that allows districts to setup their particular process flows. This document will show you examples of how Task Manager might be used in your district to assist you in your day-to-day operations.

## 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.

Below, you will see a screen-by-screen example of one way to setup a new hire process. Keep in mind that Task Manager Processes are completely customizable, so feel free to make alterations to this guide for your own use.

Please reference the following screenshot of the Process's architecture as you read through the individual steps in order to gather an understanding of where the steps are in the process and how they interact with each other.



From the Web, go to Product Setup \ Task Manager \ FIN/HR Tasks \ Processes to add a new process.

The screenshot shows a web browser window with the URL `localhost/scripts/cgiip.exe/WService=wsFin/qwkfwtempedit000.w?isPopup=true`. The page title is "Process Maintenance". The form contains the following elements:

- Area:** Employee
- \* Process Short Description:** Adding a New Employee
- \* Process Description:** Adding a New Employee
- Icon:** A set of radio buttons with icons for various categories; the person icon is selected.
- Active:** A checked checkbox with the label "Active - Allows tasks to be created off of this process".
- Selected Organization Chart:** A dropdown menu showing "Work Requests".
- Instructions:** A text area containing "Follow this process for adding new Employees into the Skyward System."
- \* Subject Selection:** Three radio buttons: "Assign Initiator as Subject", "Allow Subject to be selected from list of Employees", and "Allow Subject to be entered as free form text". The third option is selected.

At the bottom left, a note states: "Asterisk (\*) denotes a required field". On the right side of the form, there are "Save" and "Back" buttons.

This is the Root of the New Hire Process. All processes must begin with this basic root setup. Here, we describe the overall process and its use. Notice that the Subject Selection is set to “Allow Subject to be entered as free form text.”

The first option, “Assign Initiator as Subject,” would indicate that the subject of this process is the same person that *began* the process. However, this process’s subject should really be the new hire.

The second Subject Selection option, “Allow Subject to be selected from list of Employees,” would require the initiator of the process to select the Subject – in this case, the new hire – from a list of existing Employees. As the new hire hasn’t been added to the Skyward database as an employee at this point, it would be impossible to select them from the list of existing employees.

Instead, we have chosen “Allow Subject to be entered as free form text,” having the initiator of the process type in the name of the new hire as the Subject of the process. We can change the Subject of the process to the new hire’s employee name key in a later step.

After adding the Process, select the Process and click the “Step Maintenance” button. Click the “Add” button to begin adding steps.

**Process Step Maintenance**

\* 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: [ ] ? 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

The first step will be assigned to the Process’s Initiator by default. As such, this example is having the person that began the process also scan in and attach all of the various forms and documents that need gathered for the new employee.

By having the initiator attach these documents to the Process, all other users that access this process may view or download the files for their own use directly from the process.

**Process Step Maintenance**

\* Parent: Upload Documents for HR

\* Assign To: [Select a Group]

Group Selection: Human Resources Departm

**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 Step	Description
S0002-01	Add Employee
S0002-02	Change Subject

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.

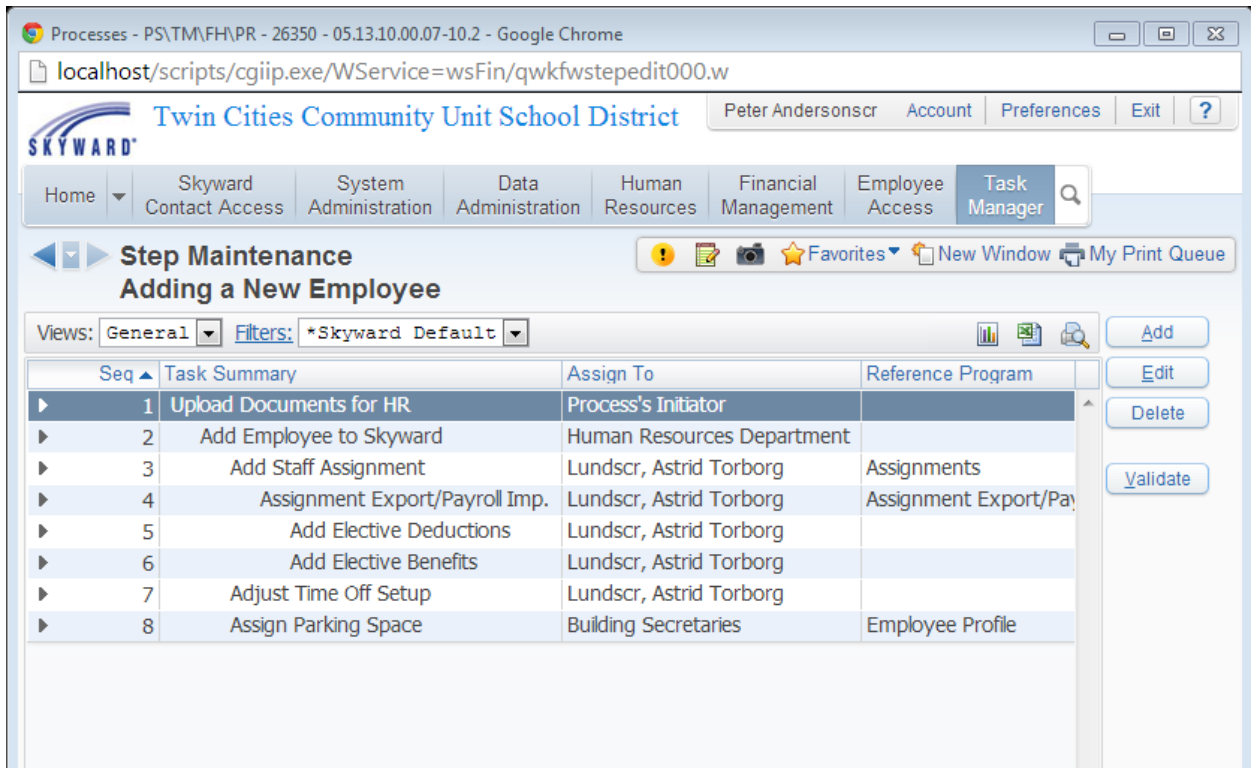
The second step is assigned to the Human Resources group, which we designed and selected by clicking the “Group Selection” link. All employees that are in this group will be assigned this step simultaneously, allowing for any of them to add the new employee.

By working through the sub-steps, users responsible for this step will use the project’s attachments to build the new hire’s Employee Profile into Skyward. They will then change the subject of the Project to the new hire’s Employee record, which is accomplished by having the “Allow Subject to be assigned during this step” Step Option selected.

The second Step Option ensures that if a single person from the HR group completes this task, the task is closed for all members of the group, so the employee isn’t added to the database multiple times. Please do note that the completion of this step will cause ALL other open steps that share the same “Parent” to

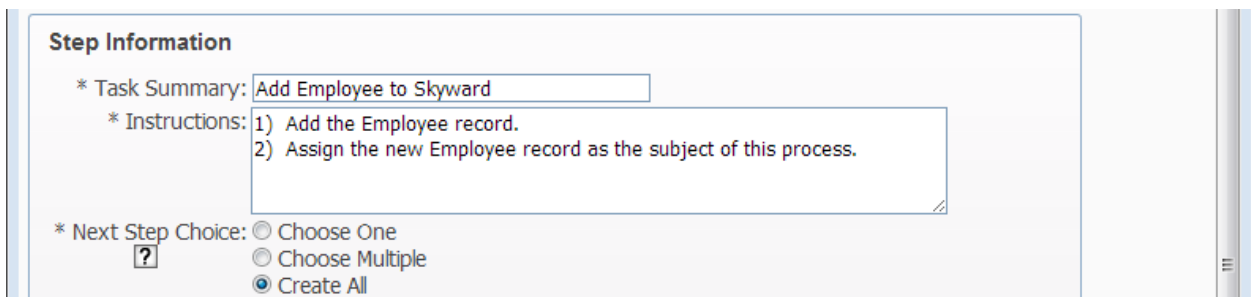
close, even if they are different steps form this one. As such, it is best practice to ensure that steps that are assigned to a Group are the only step assigned to their Parent step, and the rest of the process occurs after the Group’s completion of their step.

If you look at the screenshot on page one (shown again below), you’ll notice that after the “Add Employee to Skyward” step, there are three steps that are aligned with each other – “Add Staff Assignment,” “Adjust Time Off Setup,” and “Assign Parking Space.”



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

Now, looking at the screenshot on page three (shown below), you’ll notice that the “Next Step Choice” for “Add Employee to Skyward” is set to “Create All.” This means that all steps that use “Add Employee to Skyward” as a parent will be created automatically upon its completion.



In short, the remaining steps for this process must be carried out before the new hire process is considered complete.

The “Add Staff Assignment” step would involve having the assignee (Astrid Lundscr, in this example) go to Employee Management to add the new hire’s assignment to the software.

After she completes this, the next step instructs to run the Assignment Import/Export process to update the new hire’s Employee Profile with Pay Records and Contracts from the Assignments.

Then, the “Add Elective Deductions” and “Add Elective Benefits” steps will have the assignee view the attached documents from the very first step to see what additional deductions and benefits must now be added to the new hire’s Employee Profile and Pay Records.

Separately, after the new hire’s Profile has been created, an assignee will adjust the new hire’s Time Off setup and enter any initial Time Off allocations that must be made.

We have included an example of a non-Skyward specific requirement for adding new hires with the “Assign Parking Space” step. In this case, one of the building secretaries must add information to the employee’s “Parking Space” Custom Form to indicate what building, parking lot, and space the employee is assigned.

Other additional steps that you may choose to use would be “Add employee email address to server” for the Tech Department, or “File Forms” with instruction of which cabinets/folders the various forms you receive should be filed under, or even “Create Security Badge” if you need to have badges made for your employees..

Here are some more ideas of possible Processes and their steps. Also, if you would like to discuss the use of Task Manager with other Skyward users, please click on the following link to access our Task Manager discussion on our forum: [Skyward Task Manager](#)

1. Employee Termination Process
  - a. Updating the Leave History section of the Employee Profile.
  - b. Inactivating the employee's profiles (Employee, Security, Vendor).
  - c. Removing/inactivating security across the district.
  - d. Any necessary paperwork and its submission.
  
2. Purchasing Process
  - a. Add a Requisition
  - b. Submit Req for approval
  - c. Fully Approved Requisition becomes a PO.
  - d. Batch Update the PO
  - e. Print PO and send to vendor.
  - f. Receive Items from Vendor.
  
3. Accounts Payable Process
  - a. Add Invoice to Skyward
    - i. Tie to PO
    - ii. Attach files to Invoice
  - b. Batch Update Invoice
  - c. Check Processing
  - d. Mail Checks / Send ACH file.
  
4. 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.
  
5. 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.
6. Employee's request for change to Deduction Amounts for additional federal, ACH deductions, etc.
7. Any scheduled HR Data Mining Report can be assigned a process that contains filing steps or procedures for reviewing the document.
8. Schedule a report just to trigger a process – 941s are due soon, or begin year end processes, etc.