

# TASKS

## Creating and using tasks

The user organization of the ioLiving online service has tasks that improve operations or are measures for corrective action. For example, moisture damage is noticed on a construction site and it is decided to improve moisture protection. A task called “improving moisture protection” is created. Similarly, professional kitchens have tasks to develop HACCP or reduce food waste.

ioLiving has a “Tasks” function where the user enters the agreed tasks. The service also monitors the completion of the task. Tasks can be recurring tasks (performed every day or every week, etc.) or one-time tasks (done by an agreed date).

The account main user creates form templates for tasks, so task management can be used flexibly in almost any operating environment. Task function requires activation of the appropriate license for your account.

### **The benefits of tasks function:**

- The agreed tasks are not forgotten
- The whole organization sees tasks and their status
- An archive is created from the completed tasks

### **Requirements for using task function**

- The unit main user has a valid ioLiving license.
- The unit main user has created a staff list on the ioLiving service (optional)

Tasks will be performed as directed on a daily, weekly, monthly, quarterly, semi-annually, or non-recurring basis by the set target date.

A task is reported in the archive when the task has been completed including the result and information of the corrective measures if deviations were found. The Tasks feature replaces paper forms that are typically used in task reporting. The task is a form template placed in the ioLiving service. The task form includes the information of the completed task, completion time, task performer and success. This information can be reviewed later in the service.

For recurring (daily, weekly, etc.) tasks, the form is completed at the same time as the task is completed. The task is approved with the information required and its success (Unsuccessful / in progress, Accepted with corrections, Accepted). The archived information is displayed in the service and in reports. For non-recurring tasks, the form is completed when the task and target date are agreed. The status of the task is updated according to the instructions.

In an organization with multiple locations, the organization main user creates task lists for the entire organization. These lists are automatically copied and updated to all units in the organization. When a unit staff member fills out the task, they use either their own unit-linked or shared user account.

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## Creating tasks

### A. Non-recurring tasks

1. When the license is activated, the **“Tasks”** menu is displayed on the main page of the ioLiving service. By selecting **“Create new task template”** in Tasks, a task template appears. The task template must be named, after which it is defined in the **“Task must be done at”** drop-down menu by selecting **“Set target date”**. This means completing a non-recurring task. **“Task name”** and **“Due date”** -fields will automatically appear in the form template.

It is possible to create new fields below these fields by selecting **“Add input fields for the task”**. The color can be selected for the form and, if necessary, a short instruction text is added to facilitate the completion of the form. With an organizational license it is possible to share the created to-do list with all units in the organization, by selecting **“This task is shared with all units”**. These units are not able to edit shared task fields or settings, but they are able to create new task lists for their unit based on this template.

2. After saving the template, the actual tasks are created by selecting the created template and then **“Create new task”**. In the task form to be filled in, a description of the task is written, the target date is selected, the necessary information is entered in the fields previously defined, and a reporter is selected. The options for the reporter menu are the names of people previously added to the staff list.
3. When the task template is ready to be filled in, it will be saved by selecting **“Unsuccessful / in progress”**. This is because it is only now possible to complete the task, and the task performer fills the task form as the task progresses.

### B. Recurring tasks

1. By selecting **“Create new task template”** in Tasks menu, a task template appears. The task template must be named, after which it is defined in the drop-down menu **“Task must be done at”**. The selected period of time means that the task selected to be performed weekly must always be completed by the end of the week, i.e., by the end of Sunday. The daily task must be completed by 11:59 p.m., etc.
2. New fields can be created under these fields by selecting **“Add new field”**. The color can be selected for the form. It is possible to add help text to make it easier to fill in the form. To save the form, select **“Save template”**. With organizational license it is possible to share the created tasks with all units in the organization, by selecting **“This task is shared with all units”**. These units cannot edit fields or settings in the shared task template.
3. After creating the task, it will appear on the **“Tasks”** page. If a due date has been set for the task, an icon appears in front of the task name. The icon flashes if the task is not filled within the set time.

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4. It is possible to enter numerical measurement results with the usual task recording. The only difference is the extra field before the comment into which the measurement result is entered. To edit the task, select the “Settings” icon from the top-right corner. The task name, when to fill in, and task color are changed here.

## **Examining the completed task lists**

Completed tasks can be viewed by selecting the Tasks and then the desired period from the drop-down menu in the top right corner. The completed task is examined by selecting its result, for example “Accepted”, which displays the completed information in the list of tasks.