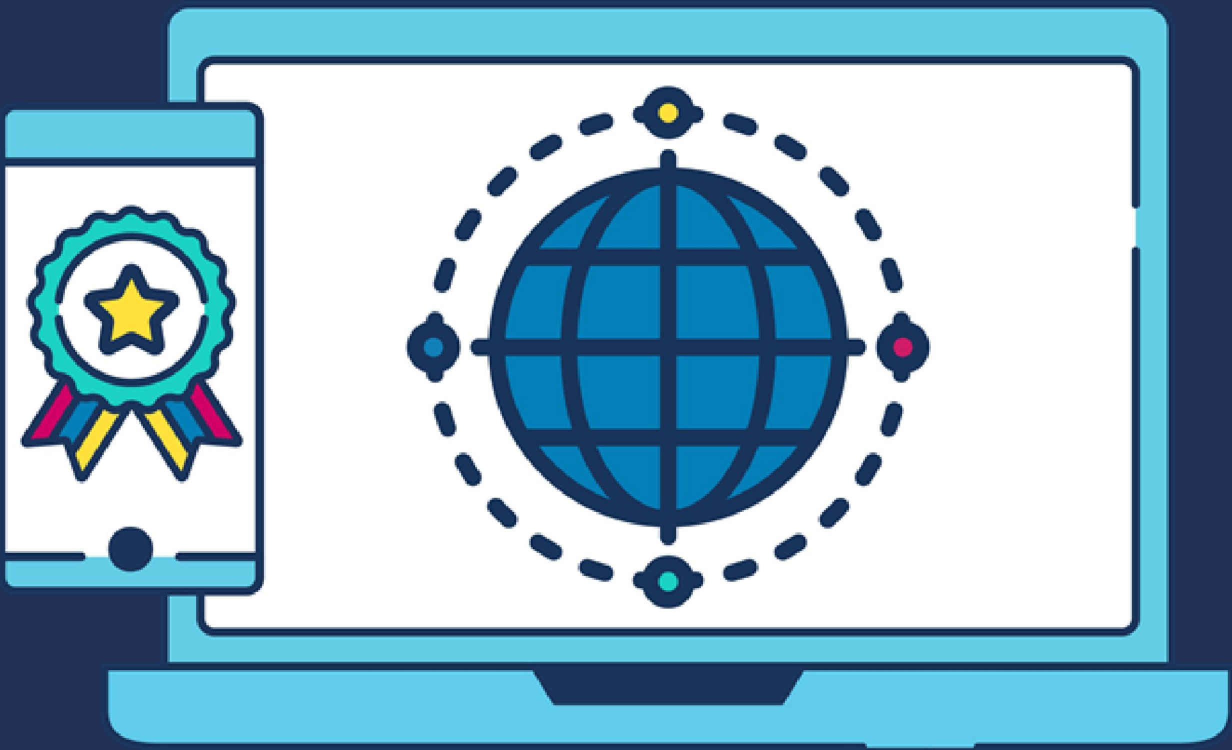
Help Desk Tasks Admin Guide

05 October 2021 (Version 21.4)



COMMERCIAL STATEMENT

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HELPDESK & SUPPORT

For help and support, please contact TEAM Software Technical Support:

- **Opening hours:** 8am -5pm Monday - Friday (excluding weekends and public holidays)
- **Contact telephone number:** 0370 626 0400 (then press option 1)
- **Email:** support@innovise.com

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INTRODUCTION

Aimed at Systems Administrators the Help Desk Task Guide talks you through all aspects of the Timegate Employee Portal self-service provision. You will learn what the different Help Desk Task are, how to configure them, how Employee Portal users interact with them and how recipients of raised tasks go about actioning them.

WHAT IS A HELP DESK TASK?

A help desk task is a message that is triggered by an employee related action. The task details the employee's wants and needs. Many can be triggered from actions within the Employee Portal, via Clock-in.com or manually created on an employees behalf. When a help desk task is raised, it is based upon a help desk task type. Each help desk task type is defined and an escalation group is assigned to it, thus ensuring messages are sent to the appropriate people within your organisation.

WHAT ARE THE DIFFERENT HELP DESK TASKS?

The following are the different help desk tasks within the Timegate Employee Portal:

- Duty Related Tasks
    - Duty Queries
    - Duty Give Aways
    - Duty Pick Ups
    - Duty Swaps
- Detail Tasks
- Diary Tasks
- Document Tasks
- Holiday / Annual Leave Tasks
- Message Tasks
- View News Tasks
- Reporting Tasks

SETTING UP HELP DESK TASKS

How do I create a help desk task type?

To create a help desk task type:

- Open **Admin | Engagement | Help Desk Task Types**
- Select **Add**
- From the dialog box, select the **New Task Type** you wish to create
- Complete the task details (these will differ from type to type) including the escalation group(s)
- Select **Save and Close**

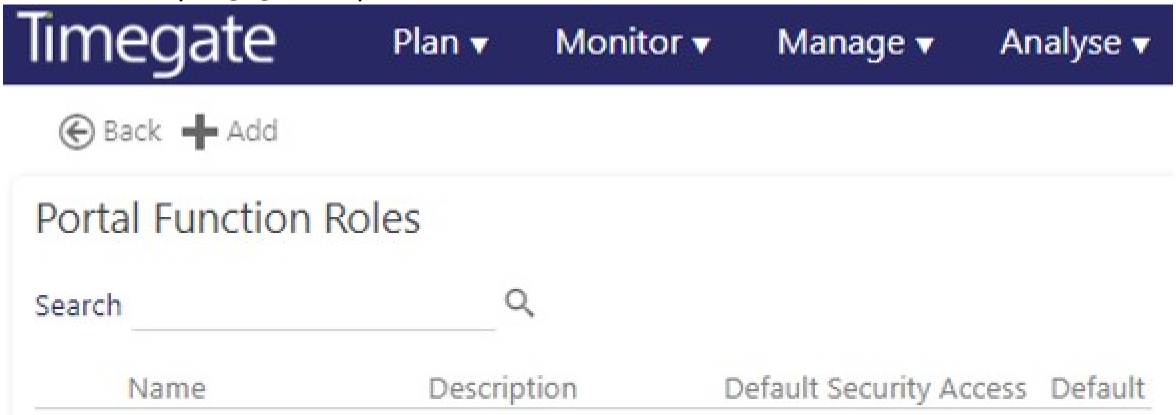
How do I set up Engagement Help Desk Tasks?

The set up process for an Engagement Help Desk Task involves:

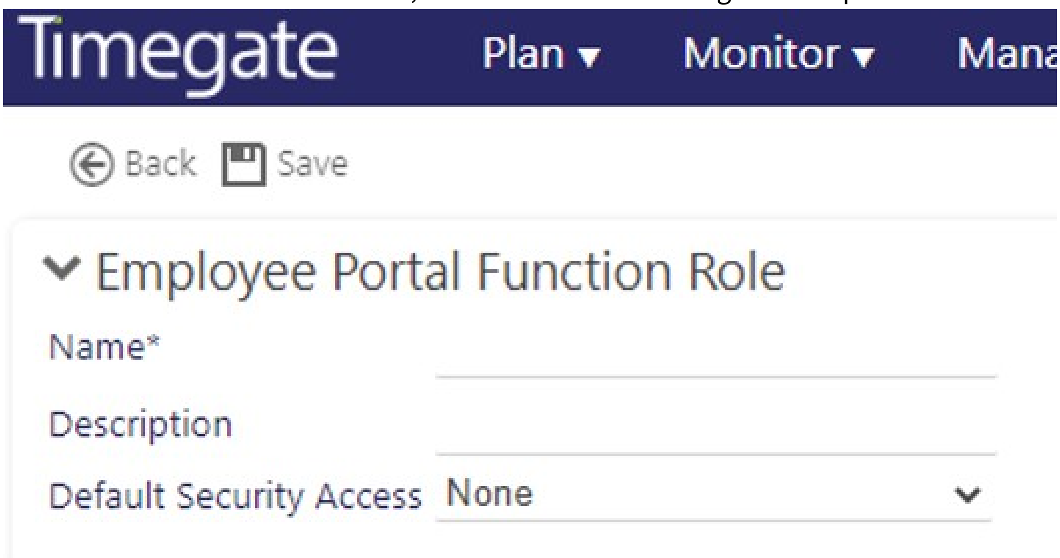
- Setting Up Portal Function Roles
- Setting Up Tasks in Portal Function Roles
- Setting Up the Help Desk Task Type

Setting Up Portal Function Roles

- Select **Admin | Engagement| Function Role** to open the **Portal Function Roles** screen:



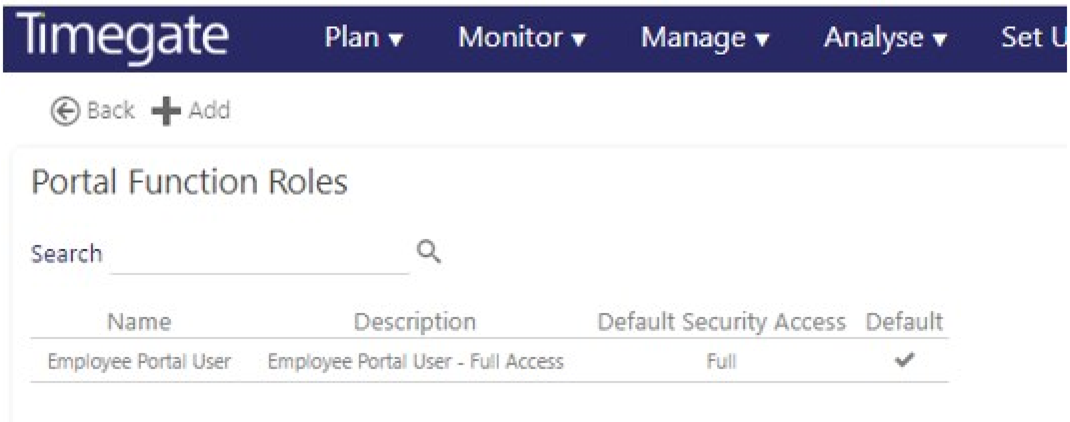
- The first time you set up an Engagement Help Desk Task, it will be necessary to add a new **Employee Portal Function Role**. To do this, select **Add**. the following screen opens:



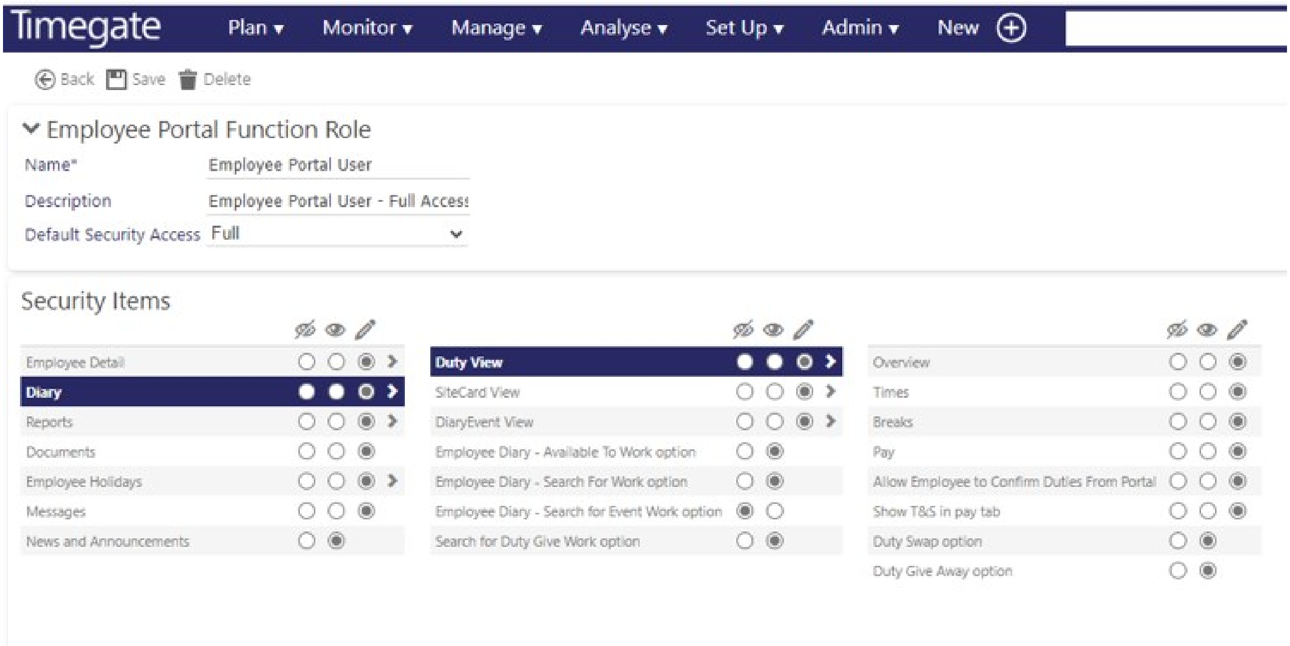
- Enter a **Name** e.g. Employee Portal User
- Enter a **Description**e.g. Employee Portal User - Full Access
- Select the **Default Security Access** e.g. Full (from **None**, **Allow** and **Full**)
- Once completed, select **Save**

Setting Up Tasks in Portal Function Roles

Select **Admin | Engagement| Function Role** to open the **Portal Function Roles** screen:



Select your **Portal Function Role** e.g. Employee Portal User



In the **Employee Portal Function Role** screen, you will see several icons:

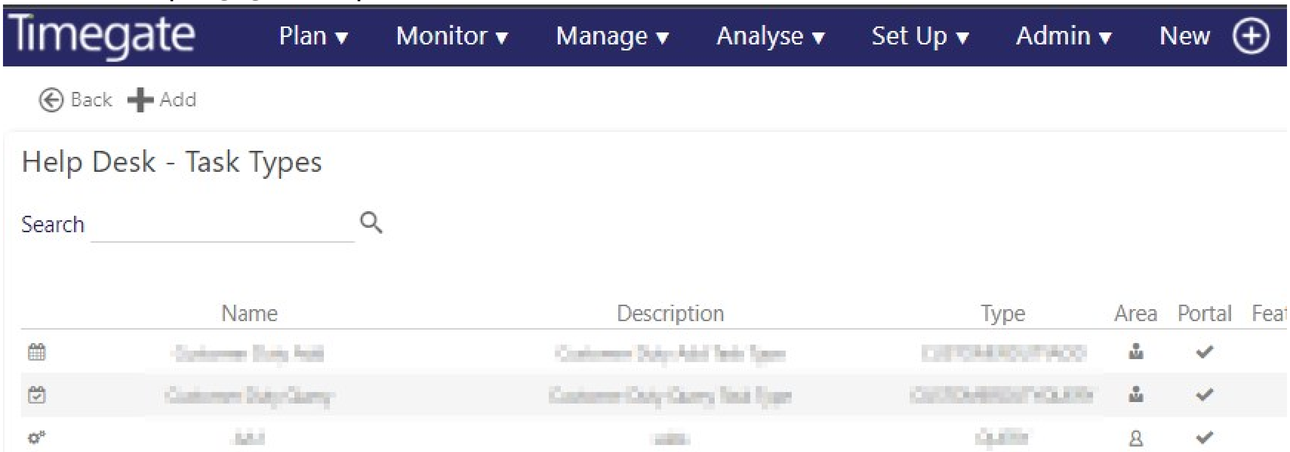
- expands the selection and gives you more options
- removes visibility of the chosen option from the Employee Portal
- gives visibility of the chosen option in the Employee Portal
- allows the user to edit the chosen option in the Employee Portal

In the Security items, use icon to navigate to the various item(s) you wish to set the level of security for. Once the you can the item, select the appropriate level of security, be that visible, invisible or editable.

Setting Up the Help Desk Task Type

After setting up the **Employee Portal Function Roles**, you now need to set up which **Task Types**. To do this:

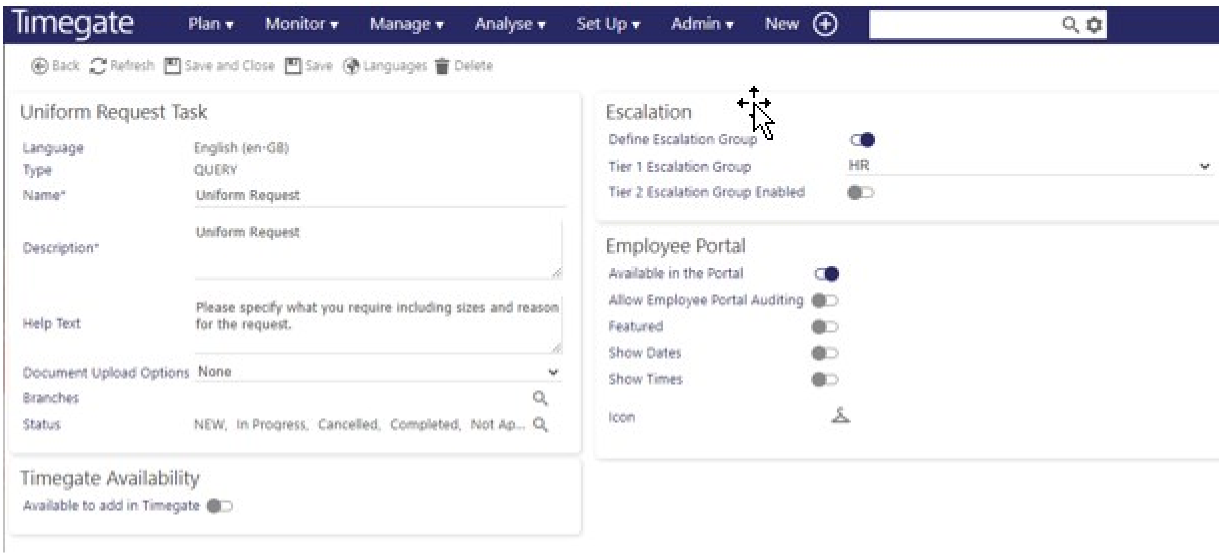
- Open **Admin | Engagement | Help Desk Task Types**:



You can see the list of **Help Desk - Task Types**:

  - The first column is the **Employee Portal** icon
  - **Name**
  - **Description**,
  - **Type**
  - **Area**
  - **Portal**- if active in the Employee Portal
  - **Featured** - if set as a separate Icon, additional to the pre-sets)

- Select **Add**
- From the dialog box, select the **New Task Type** you wish to create. the task will show. In this example, it is a **Uniform Request Task**:



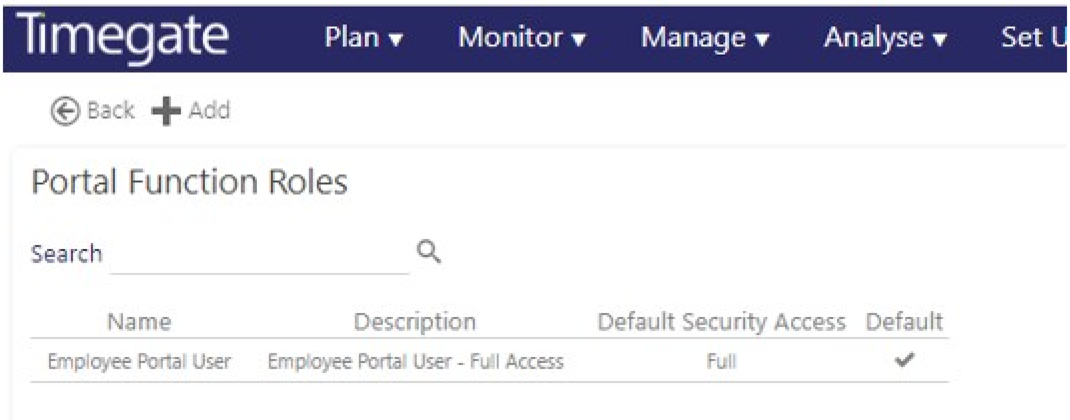
- Complete the task details by entering a **Name**, **Description**, optional **Help Text**, the **Branches** that can access **Duty Swaps**, the **Statuses** (work-flow) and any escalation group(s) as required. You can also set the language and may have an option to change the icon
- Once completed, select either **Save** or **Save and Close**

How do I set up the Duty Give Away and Duty Pick Up Engagement Help Desk Tasks?

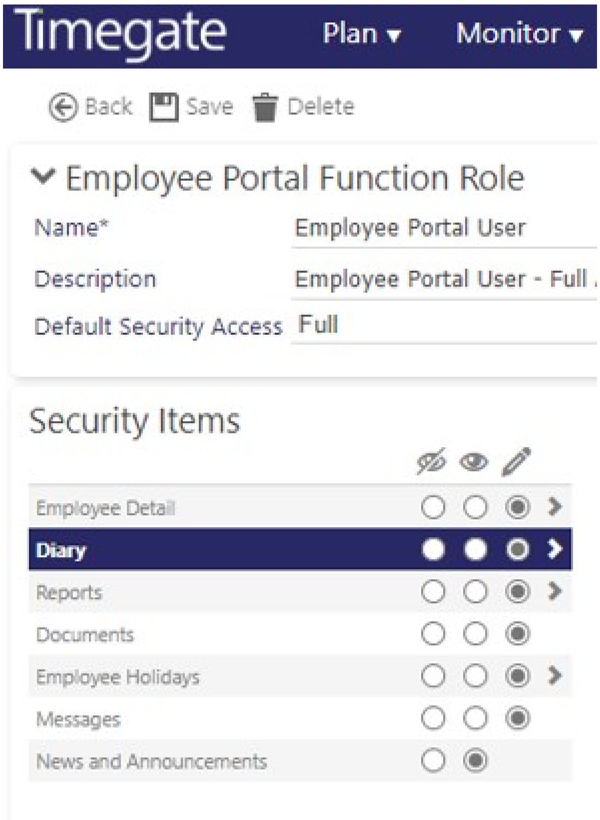
Follow these steps to enable Duty Give Away functionality:

Set Duty Give Away option to visible in Function Roles for the function role

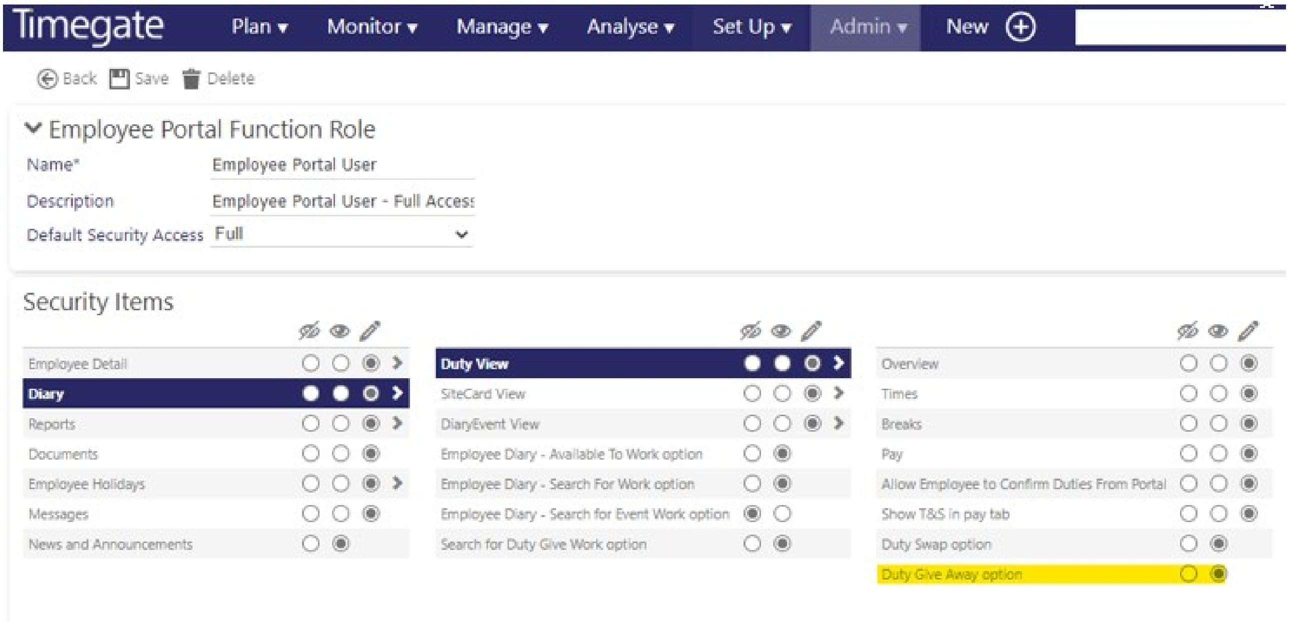
- Select **Admin | Engagement| Function Role** to open the **Portal Function Roles** screen:



- Select the role from your list (in this example, Employee Portal User) to open the **Employee Portal Function Role** screen:



- To enable the Duty Give Away item, navigate through the function roles by selecting **Diary**, then **Duty View** and finally **Duty Give Away option** as shown:

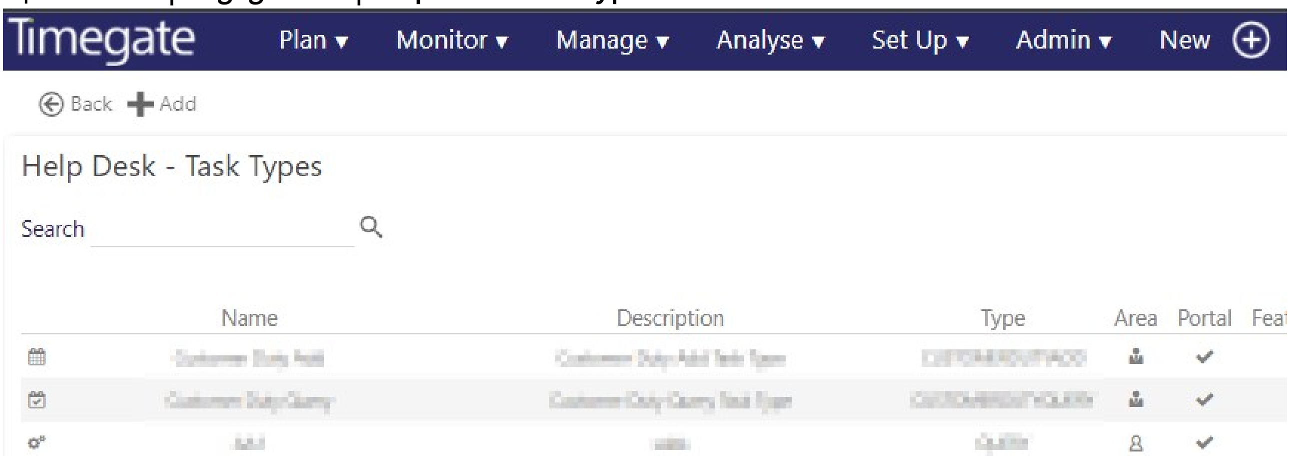


- Ensure that **Duty Give Away option** is selected:

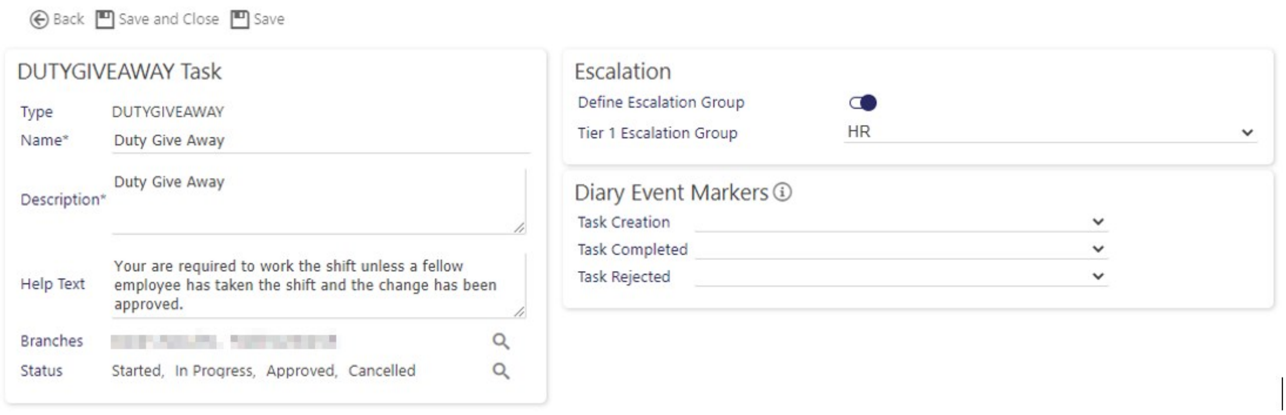
- Select **Save** before exiting the screen to save your changes

Set up the Duty Give Away help desk task type

- Open **Admin | Engagement | Help Desk Task Types**:



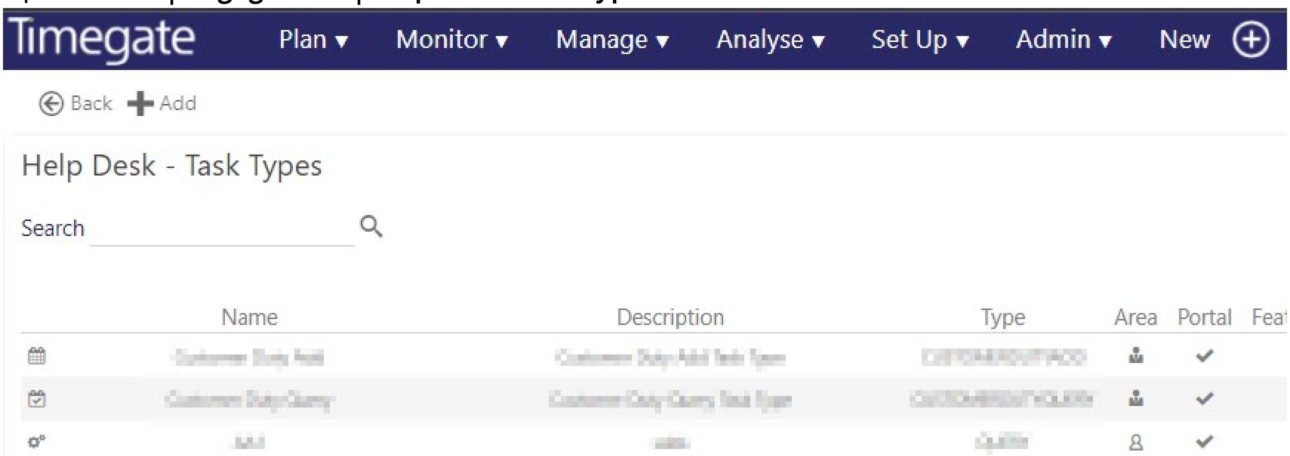
- Select **Add**
- From the dialog box, select the **New Task Type**- in this case **DUTYGIVEAWAY**. The following **Duty Give Away Task** screen loads:



- Complete the task details by entering a **Name**, **Description**, optional **Help Text**, the **Branches** that can access **Duty Give Away**, the **Statuses** and any escalation group(s) as required
- Once completed, select **Save** or **Save and Close**

Set up the Duty Pick Up help desk task type

- Open **Admin** | **Engagement** | **Help Desk Task Types**:



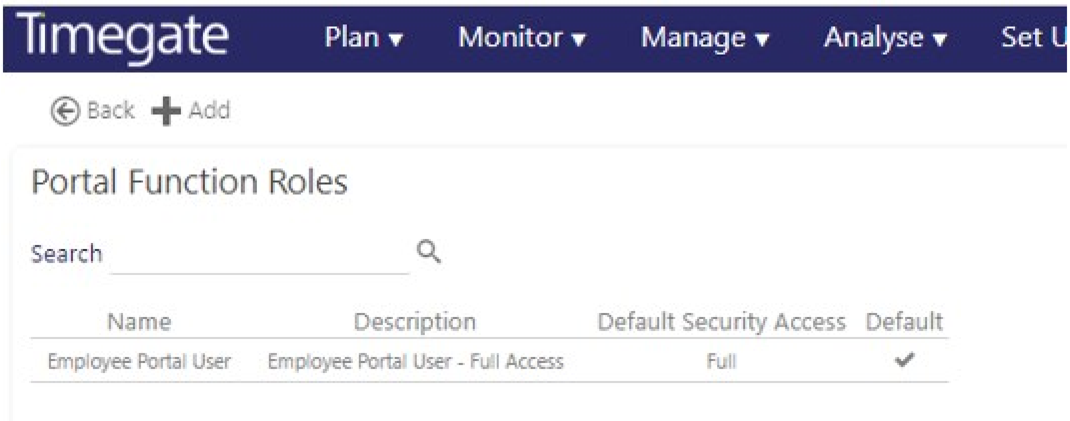
- Select **Add**
- From the dialog box, select the **New Task Type**- in this case **DUTYPICKUP**. The **Duty Pick Up Task** loads
- Complete the task details by entering a **Name**, **Description**, optional **Help Text**, the **Branches** that can access **Duty Pick Up**, the **Statuses** and any escalation group(s) as required
- Once completed, select **Save** or **Save and Close**

How do I set up the Duty Swap Engagement Help Desk Task?

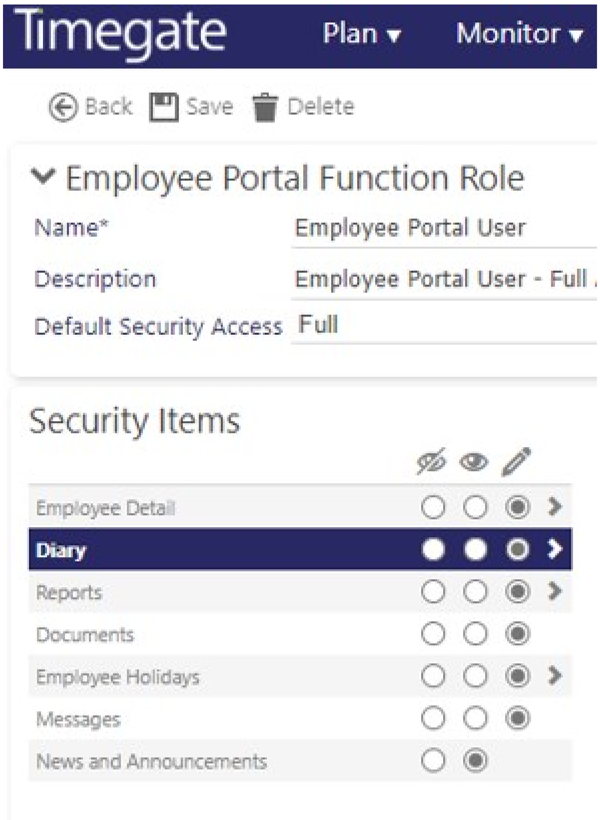
Follow these steps to enable Duty Swap functionality:

Set Duty Swap option to visible in Function Roles for the function role

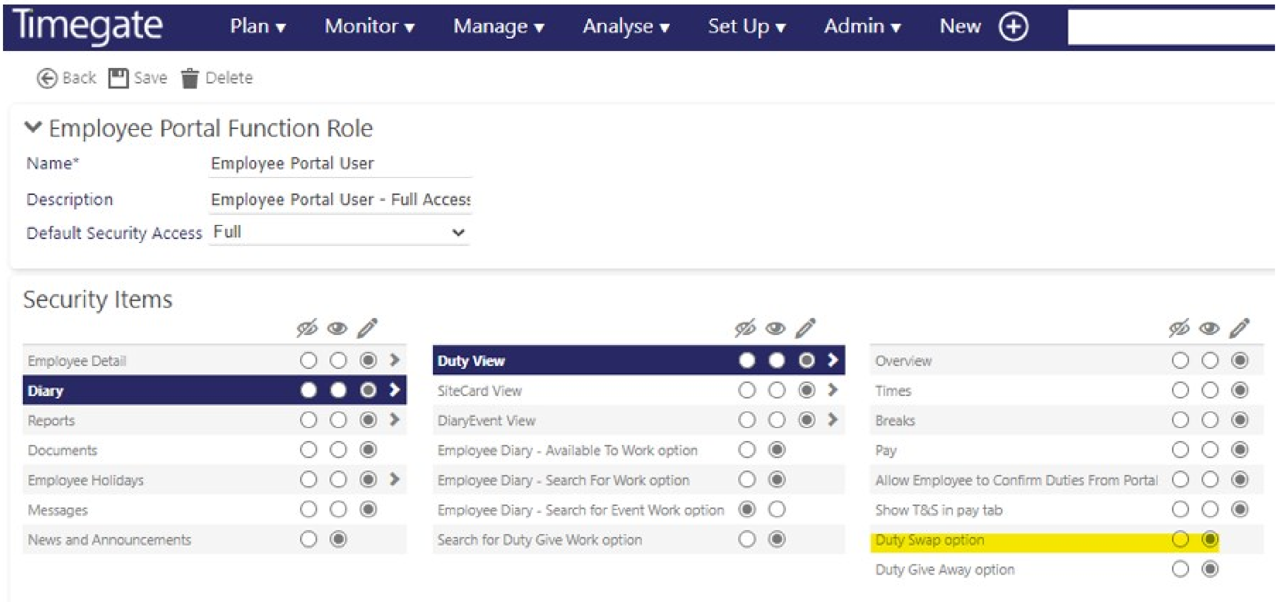
- Select **Admin | Engagement| Function Role** to open the **Portal Function Roles** screen:



- Select the role from your list (in this example, Employee Portal User) to open the **Employee Portal Function Role** screen:



- To enable the Duty Swap item, navigate through the function roles by selecting **Diary**, then **Duty View** and finally **Duty Swap option** as shown:

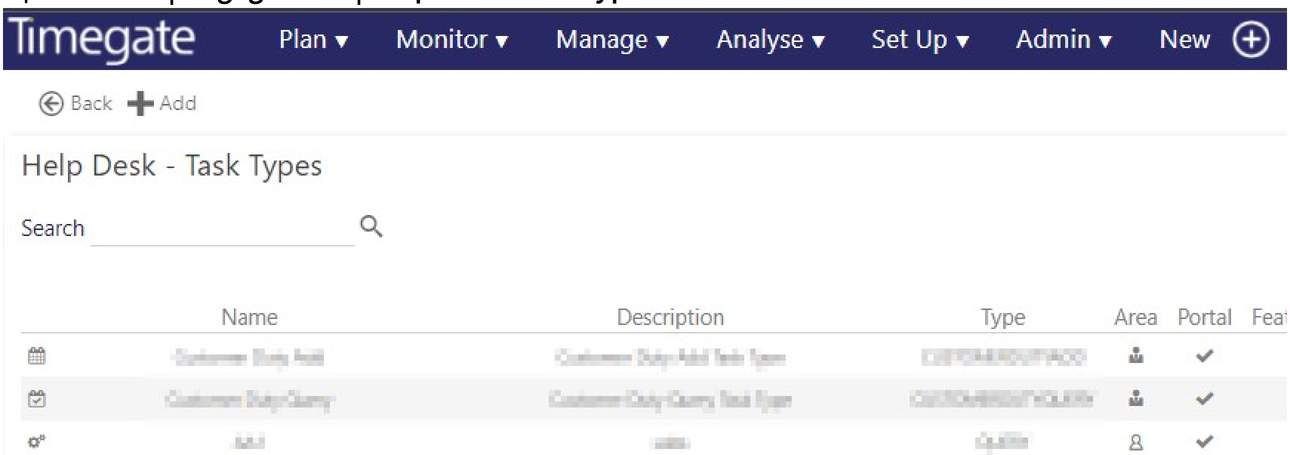


- Ensure that **Duty Swap option** is selected:

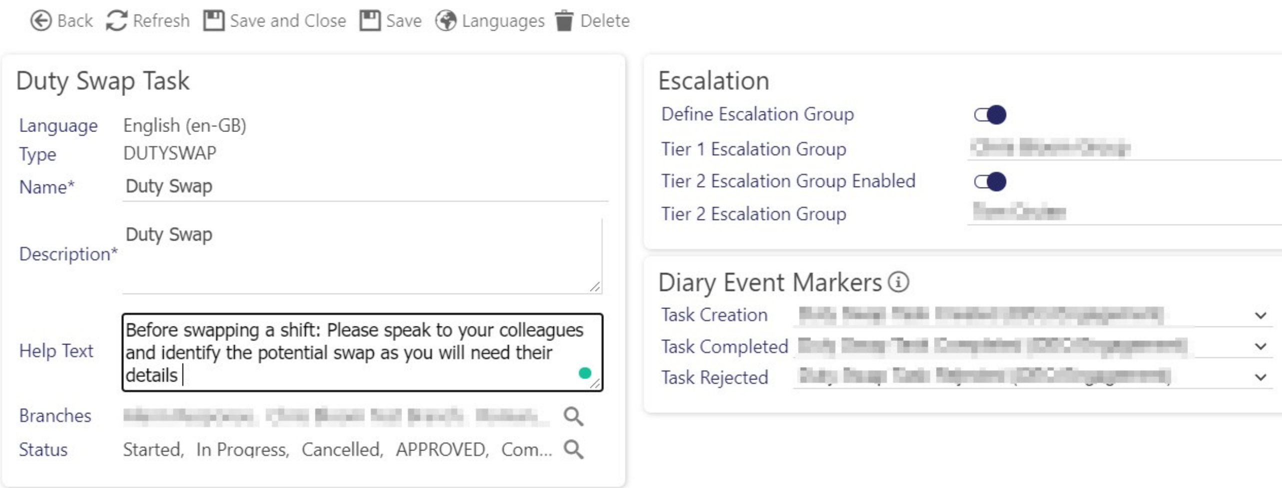
- Select **Save** before exiting the screen to save your changes

Set up the Duty Swap help desk task type

- Open **Admin | Engagement | Help Desk Task Types**:



- Select **Add**
- From the dialog box, select the **New Task Type**- in this case **DUTYSWAP**. The following **Duty Swap Task** screen loads:



- Complete the task details by entering a **Name**, **Description**, optional **Help Text**, the **Branches** that can access Duty Swaps, the **Statuses** and any escalation group(s) as required
- Once completed, select **Save and Close**

How do I restrict access to the various help desk task types based on function role?

When creating help desk task types, there are two fields that you should pay particular attention to:

- **Available to add in Timegate**
- **Function Role**

The **Available to Add in Timegate** setting helps to improve the security and access for users. It enables them to only see what is relevant for their role and responsibility when raising help-desk tasks e.g. a grievance can be raised at an area manager level but not at a junior manager.

When selected, zero, one or more **Function Roles** can be selected (using the **Function Roles** setting), enabling those allocated that **Function Role** to see the Help Desk Task.

If the **Available to Add in Timegate** switch is selected but no **Function Role** selected, all users will be able to see and use the task.

How do I assign a help desk task type an escalation group?

Firstly, you need to set up an escalation group (or multiple escalation groups) that will be assigned to the help desk task type (Please see How do I set up an escalation group?) Once set up:

- Open **Admin | Engagement | Help Desk Task Types**
- Select the help desk task type that you wish to add the escalation group to
- Select the **Tier 1 Escalation Group**
- If you wish to add a secondary escalation group, Select **Tier 1 Escalation Group Enabled**
- Select the **Tier 2 Escalation Group**
- Select **Save and Close**

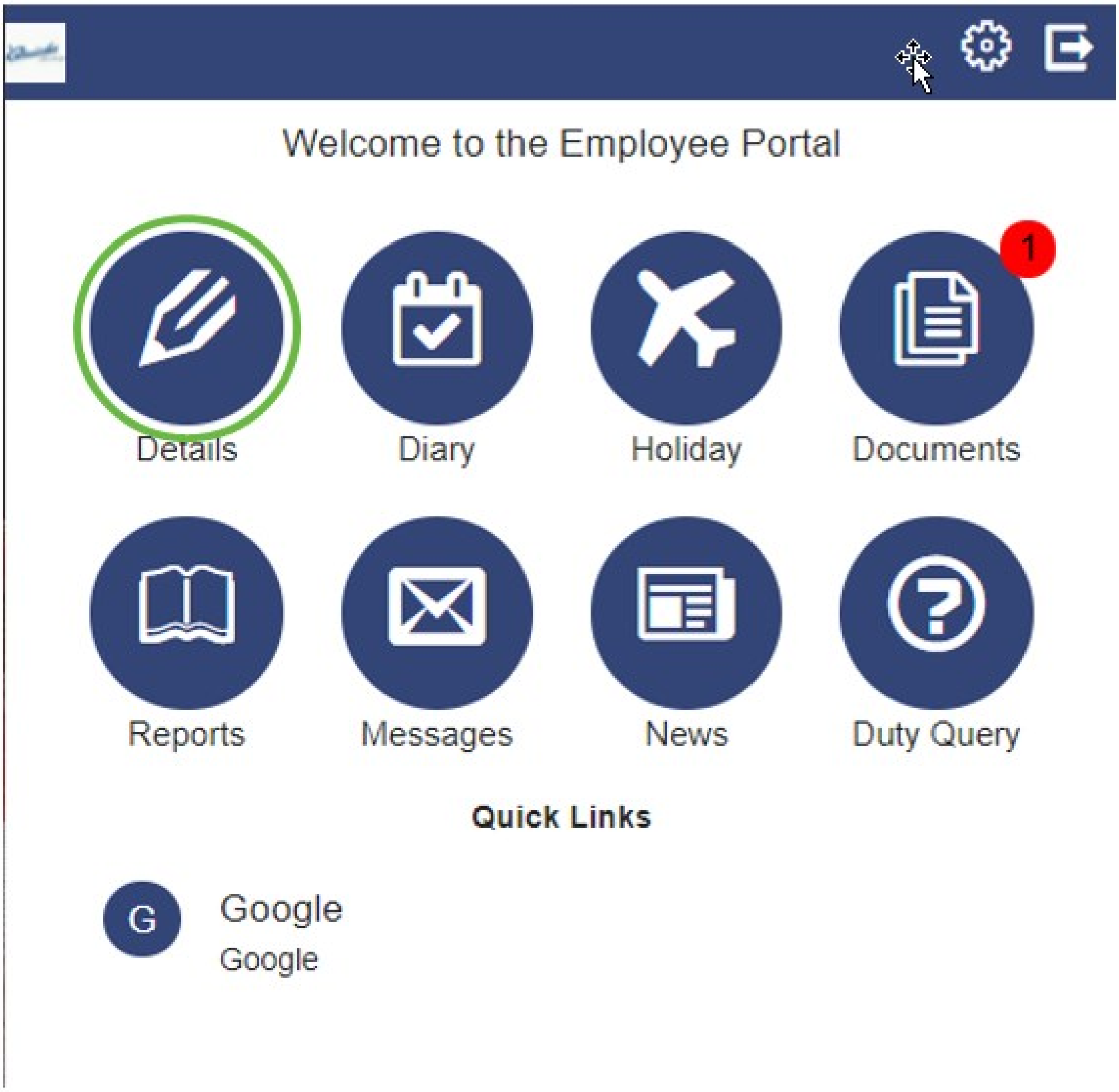
USING HELP DESK TASKS IN THE EMPLOYEE PORTAL

You raise engagement help desk tasks from within the Employee Portal. When you undertake activities such as requesting holiday, updating your personal details, creating messages, asking for new uniform and a variety of other activities, this is done automatically by a task. This section explains how you can do various activities in the Employee Portal.

How do I update my details using the Details Engagement Task?

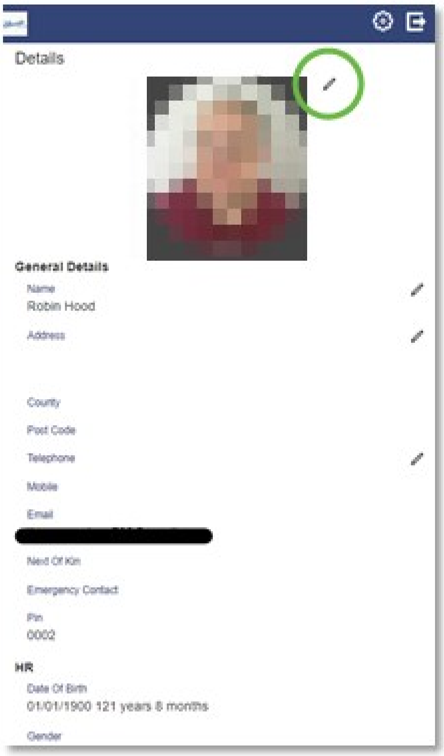
Accessing Details

You can update your personal details by selecting **Details** on the Employee Portal home screen:

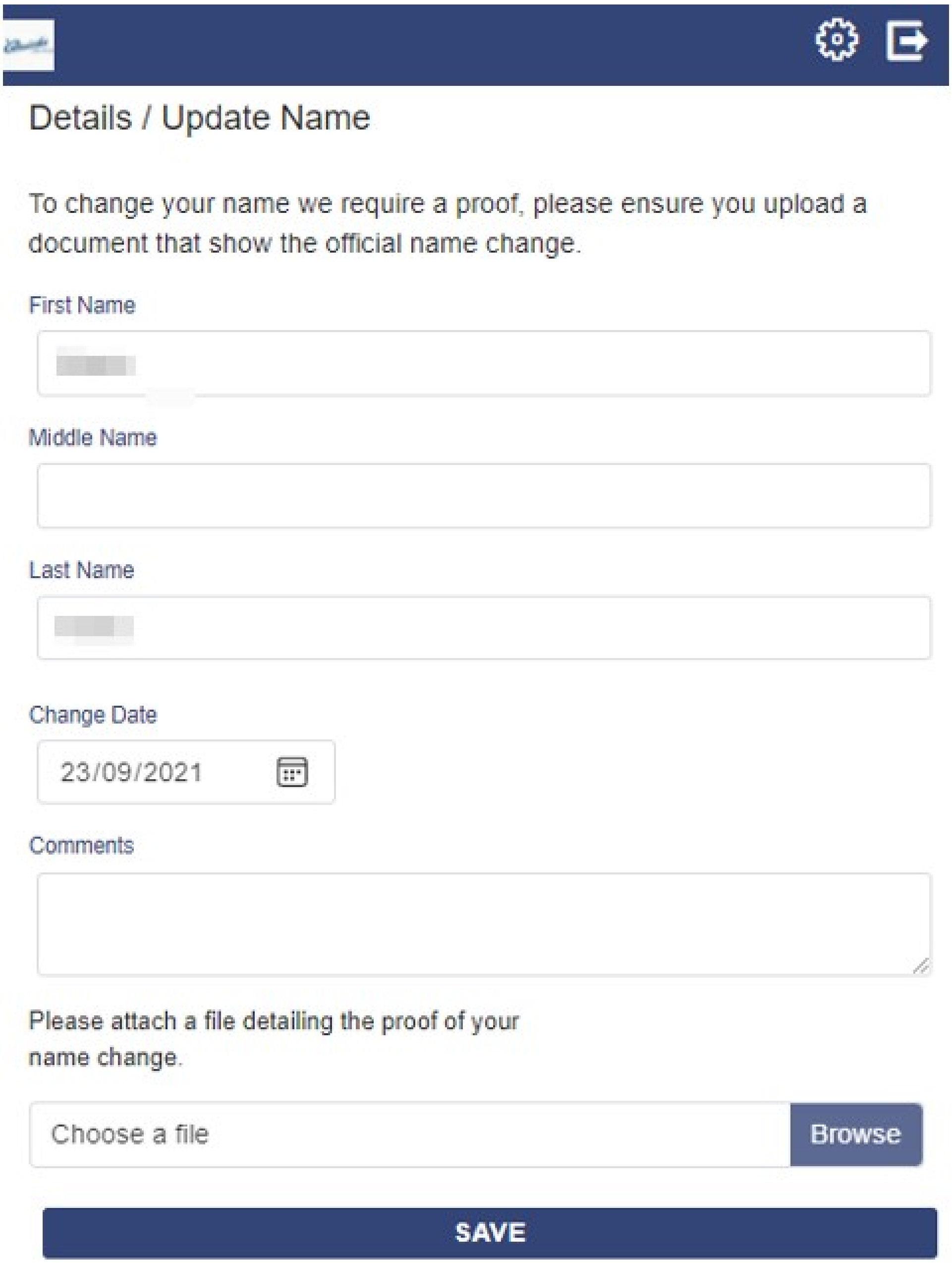


Updating / Editing Details

In the personal details screen you can edit any field that has the edit symbol . If you don't see the edit symbol, this has been removed as a function.



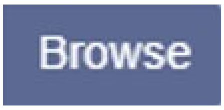
When you edit a field, you will be given instructions on what is needed (i.e. if you need to upload a photograph, what the style of photograph is)



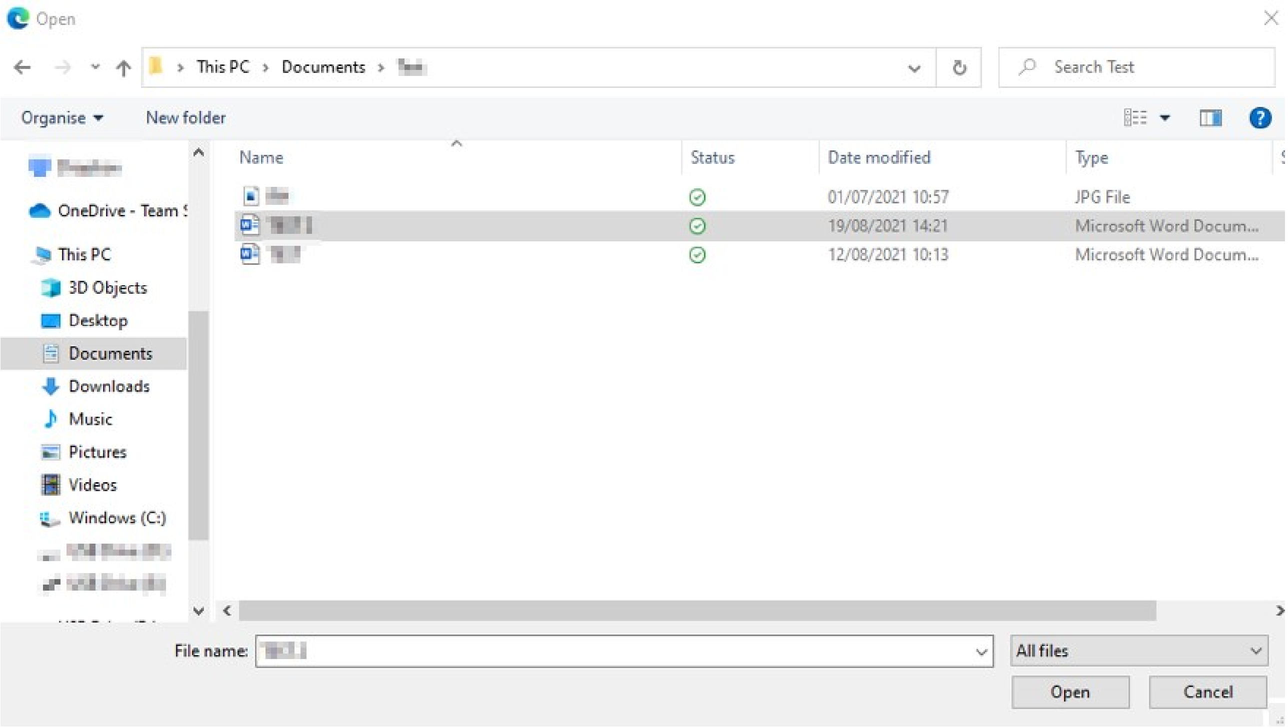
Uploading a Document

You may also be asked to upload documents (i.e. photographs or supporting evidence.)

To upload a file select **Browse**



When prompted, select your file as shown and then select **Open**

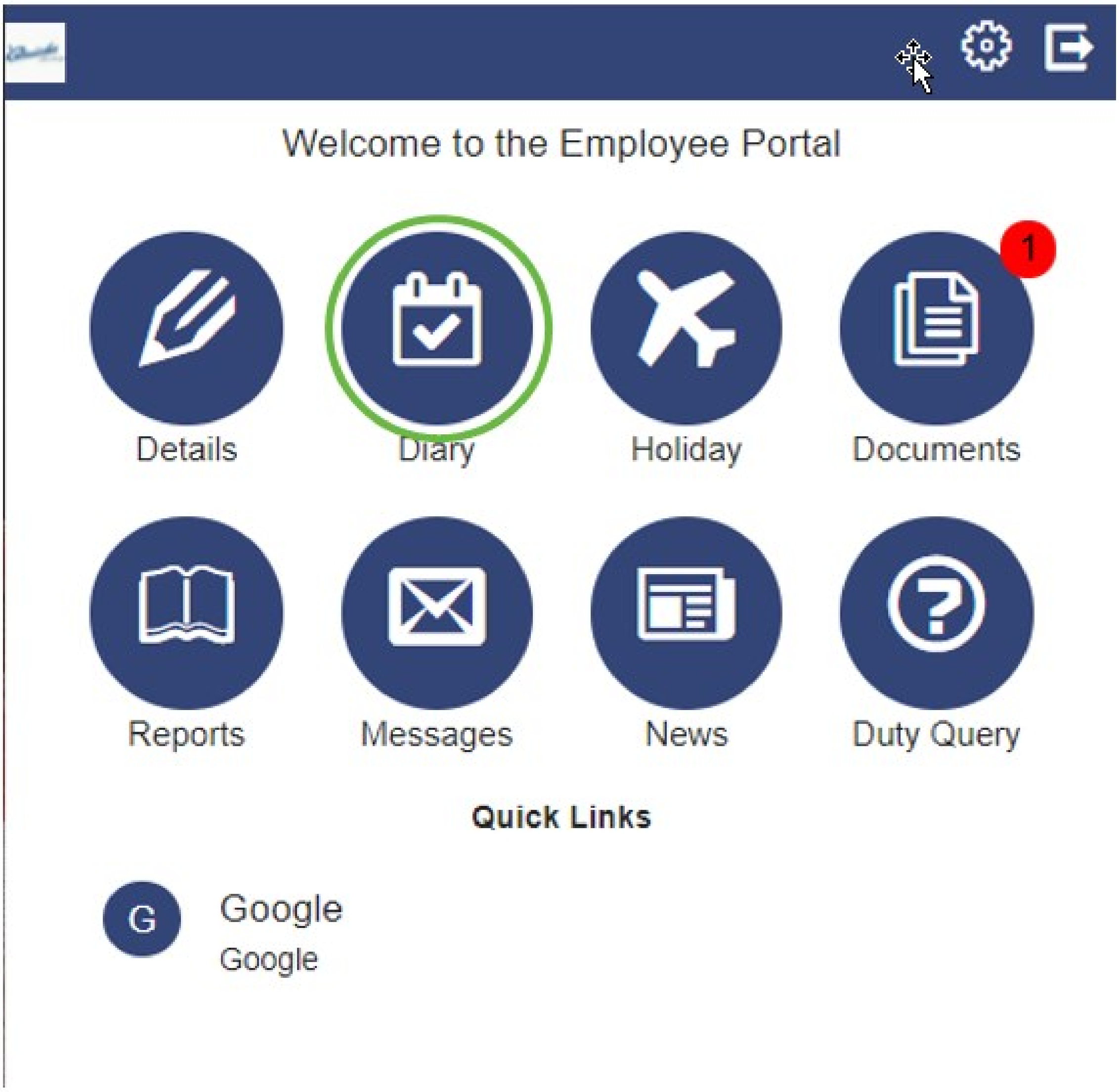


Once your edit is saved you will be informed that it has been successfully submitted. You will be notified of change in status via your message module in the Employee Portal and via email. The change needs to be approved. Once approved, it will be automatically updated for you.

How do I manage my diary using the Diary Engagement Task?

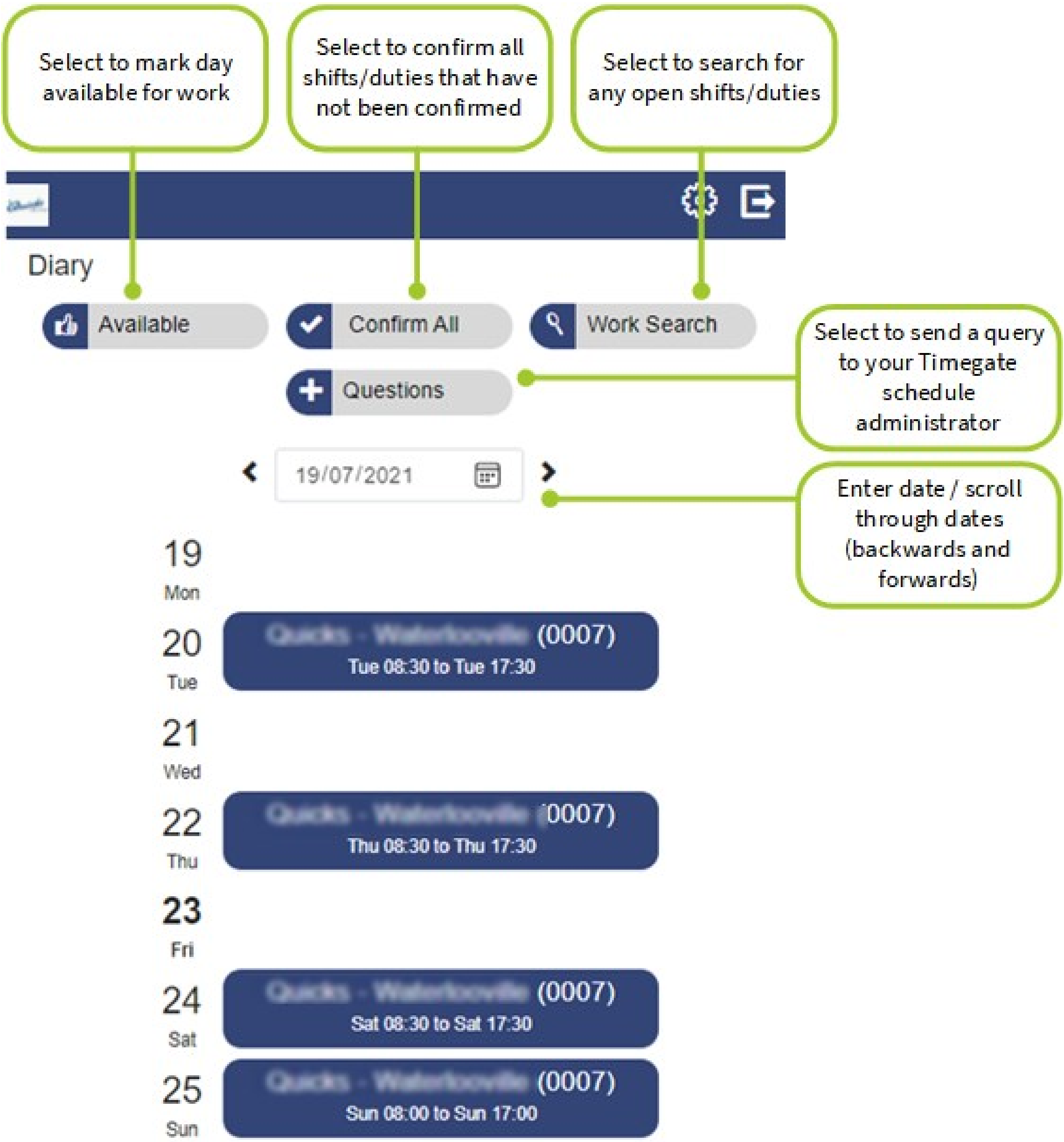
Accessing Diary

You can manage your diary by selecting **Diary** on the Employee Portal home screen:



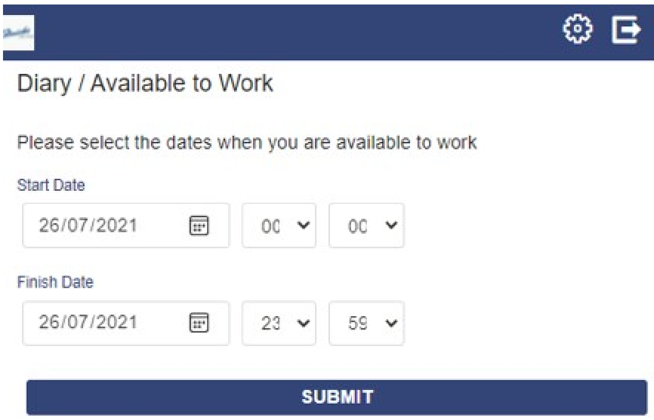
Diary View

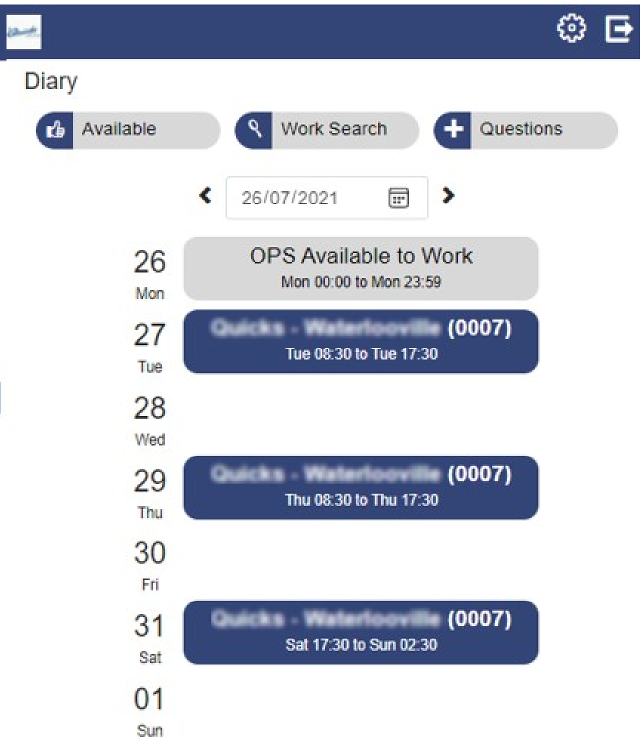
The **Diary View** shows your schedule and diary events:



Available

When **Available** is selected, the following **Diary / Available to Work** screen is displayed:





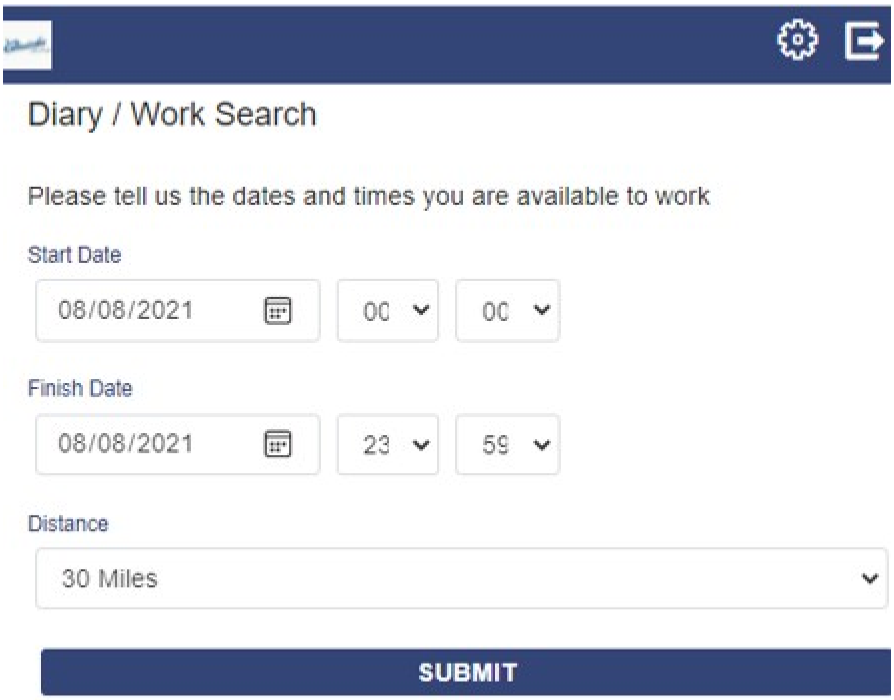
Select a **Start Date** (and time) and a **Finish Date** (and time). Once completed, select **Submit**. Your availability will display on your schedule in the Employee Portal. Your availability is visible for those searching to fill **Open Duties** in Timegate.

Confirm All

When **Confirm All** is selected, all duties that have been allocated to you, that haven't been previously been confirmed are confirmed. You can also do it individually in each duty. After **Confirm All** has been selected, the option is no longer available on the screen.

Work Search

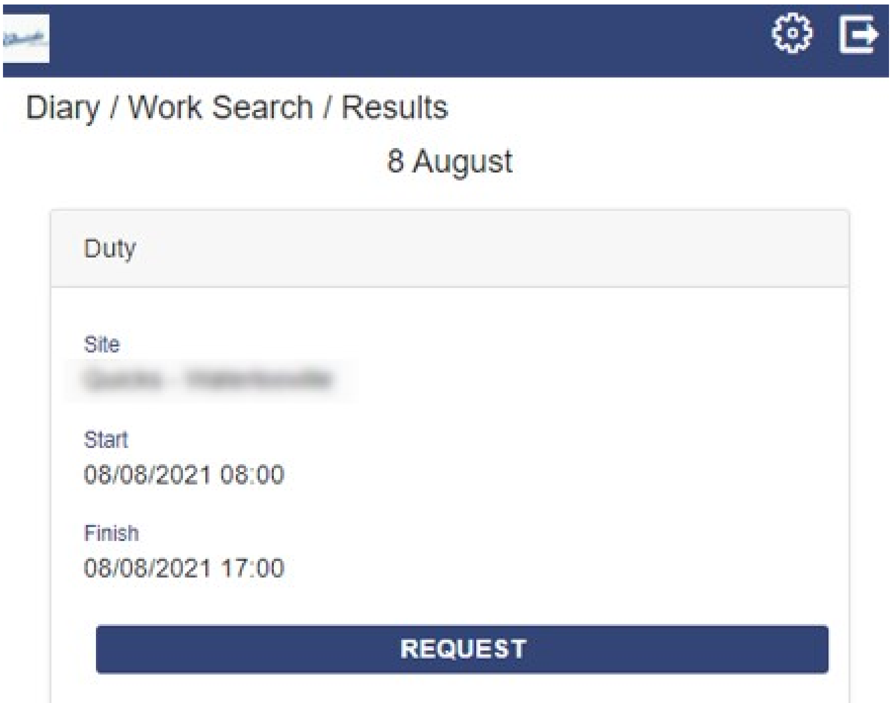
When selected, **Work Search** enable you to search for open duties:



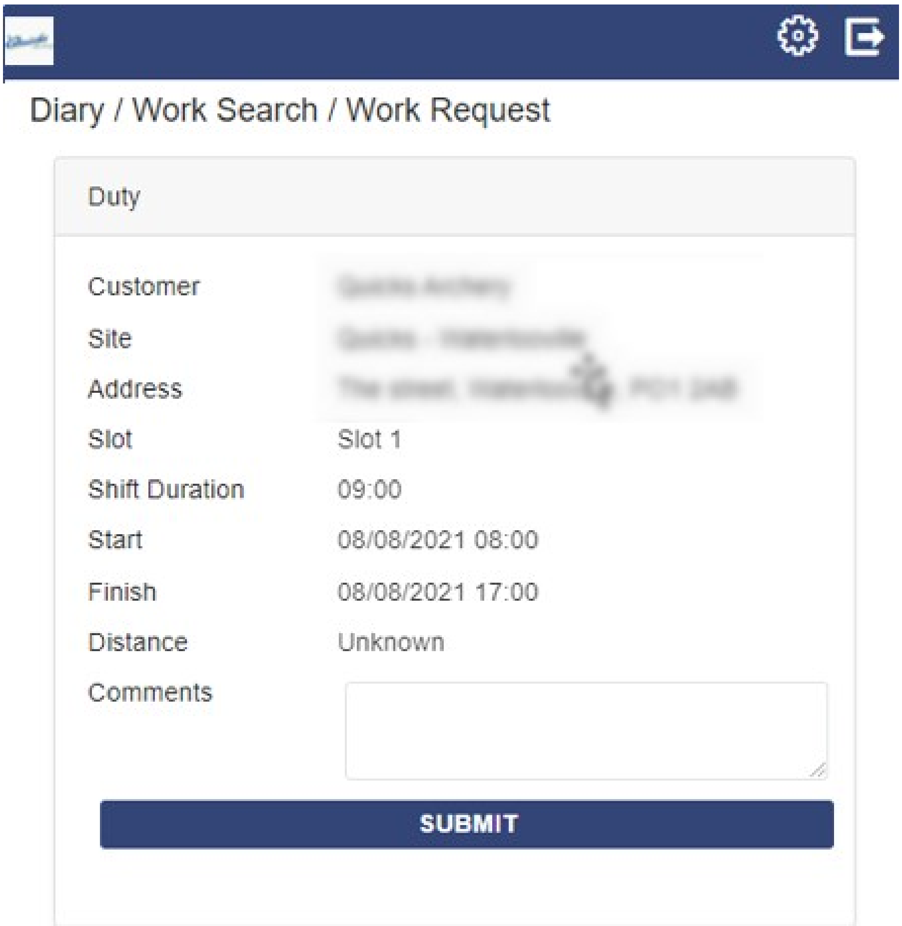
To undertake a search for work:

- Select a **Start Date** (and time) and a **Finish Date** (and time).
- Select the **Distance** you are willing to travel
- Select **Submit**.

Any available duties are shown:



For those items that you wish to apply for, select **Request**. You will then be presented with the details of the duty:



If required, add any **Comments** before accepting the request.

Select **Submit** to be considered for the duty.

A message informing you of your successful submission is shown. The duty will then be sent for approval in Timegate. You will receive a message and an email when completed. If approved, it will appear in the Employee Portal, where you will be able to confirm the duty.

Questions

To raise a duty query (question about a query), select **Questions**. From here:

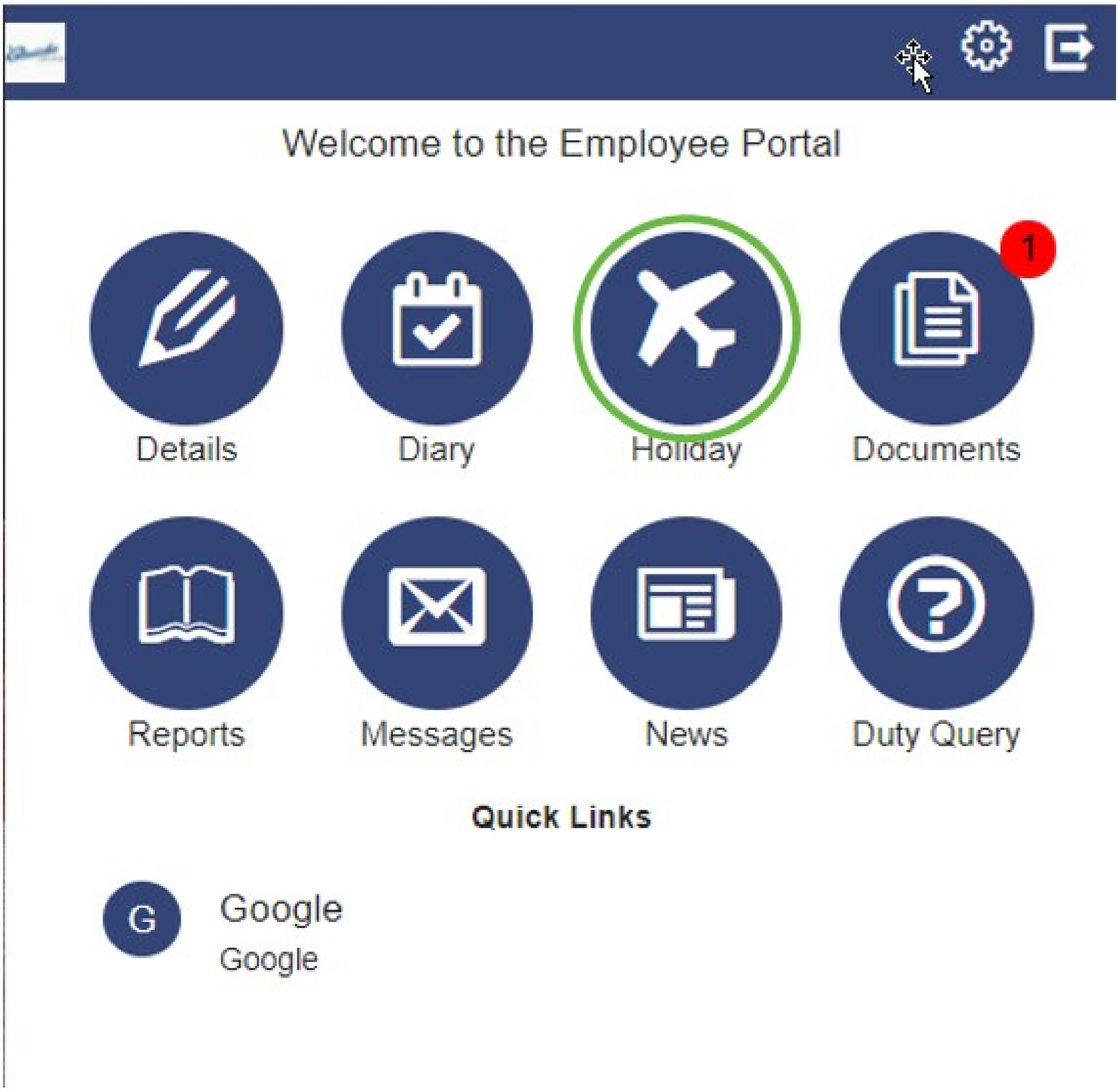
- Enter your question / query
- Select **Save**

You will then receive a message and email when your query has been actioned or answered.

How do I manage my holiday / annual leave using the Holiday Duty Task?

Accessing Holiday

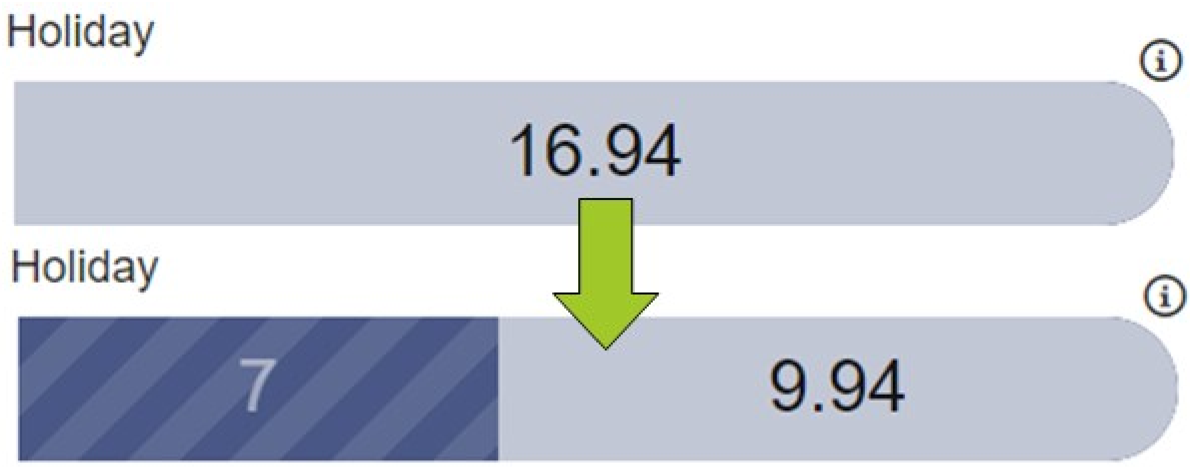
You can manage your holiday / annual leave by selecting **Holiday** on the **Employee Portal** home screen:



Holiday Screen

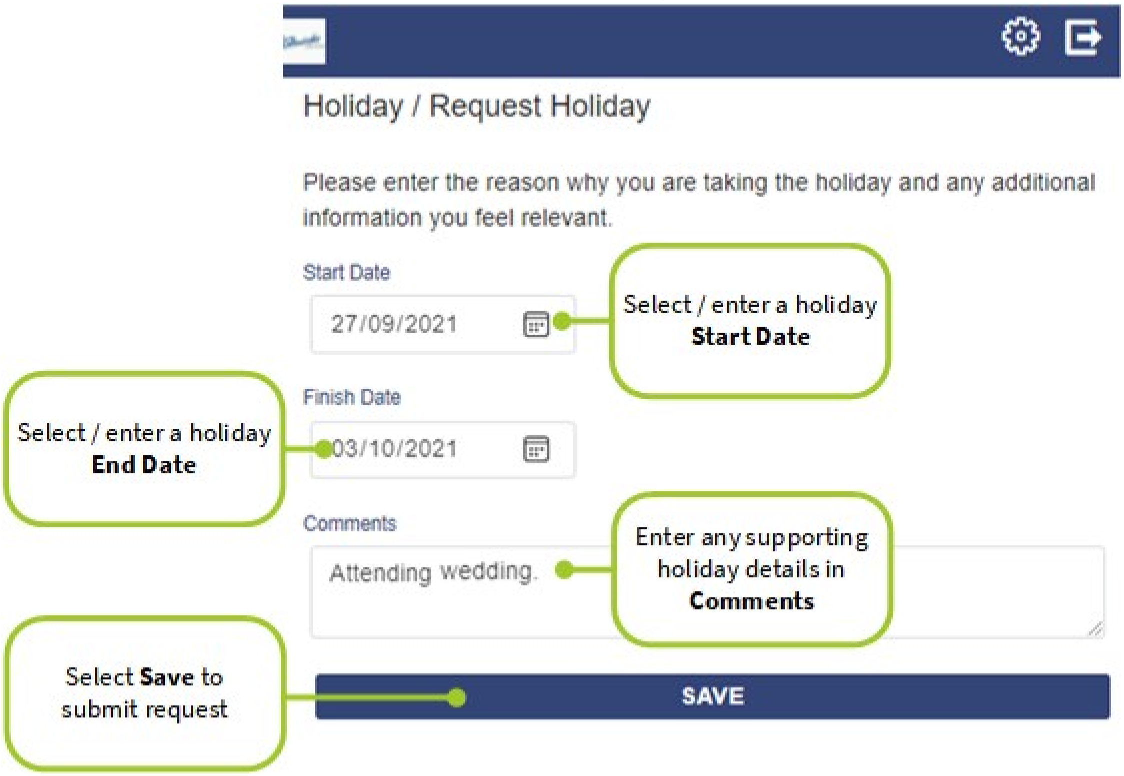
In the Holiday Screen, you will see your holiday entitlement and holiday dates, shown as both a graphic and in a detailed list. This includes **Approved**, **Requested** and **Remaining** holiday. You can view holiday for both **This Year** and **Next Year**. When viewing **This Year** and **Next Year**you can view the **Date** of the holiday, the **Requested** date, and **Status**.

Select the ⓘ icon to view the key for remaining holiday. As you request and have holiday approved, this bar will change to reflect this as shown in the example below where seven days of holiday have been requested:



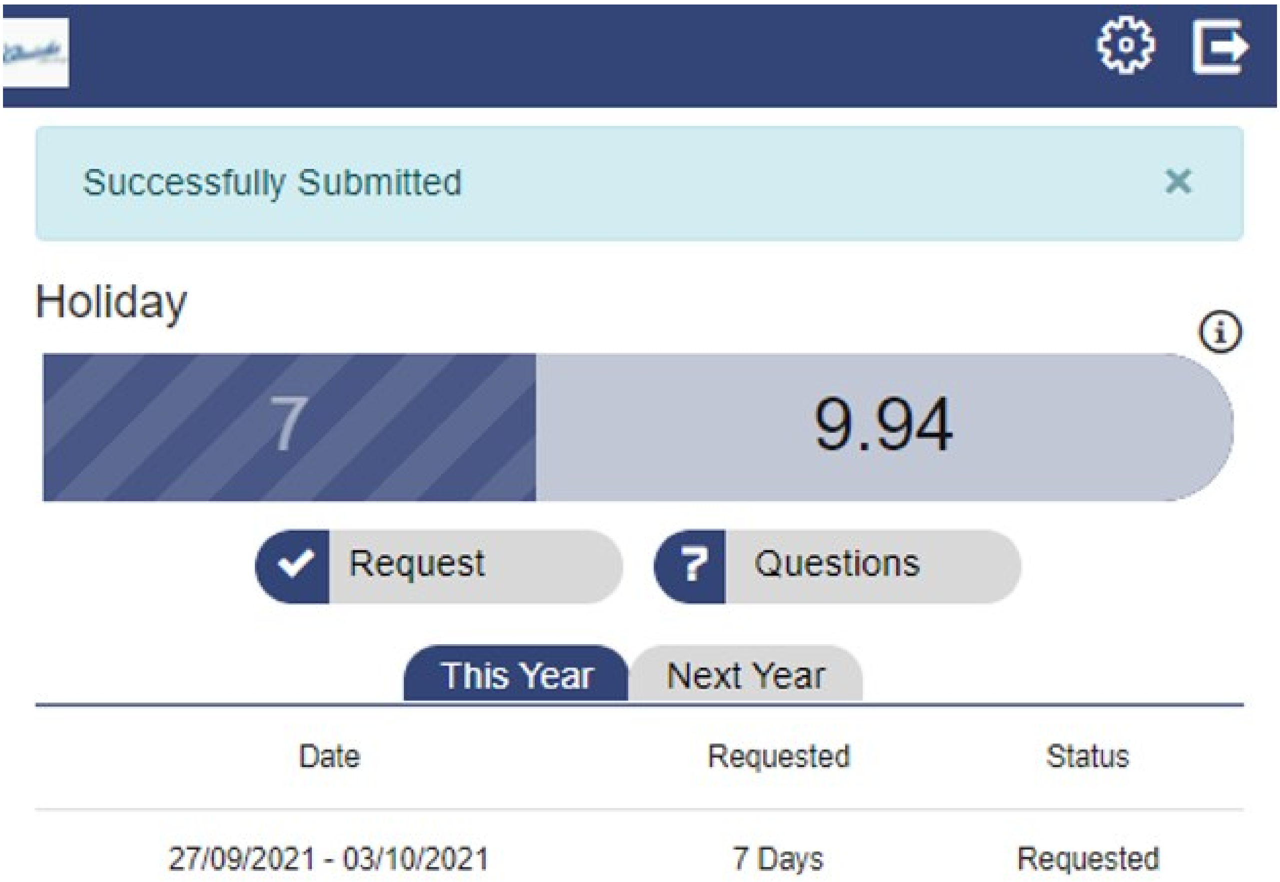
Requesting Holiday

To request holiday, select Request to load the **Holiday / Holiday Request** screen:



Enter a **Start Date** and a **Finish Date** along with **Comments** to support your holiday request. Once completed select **Save**.

Once saved, **Successfully Submitted** is shown at the top of the screen. You will also see the holiday graphic change at the top of the screen and also the holiday details in the list below:



You will receive emails and messages in the Employee Portal as the request is approved/rejected in Timegate.

Raising a Question about Holidays

If you wish to ask a question about your holiday or entitlement:

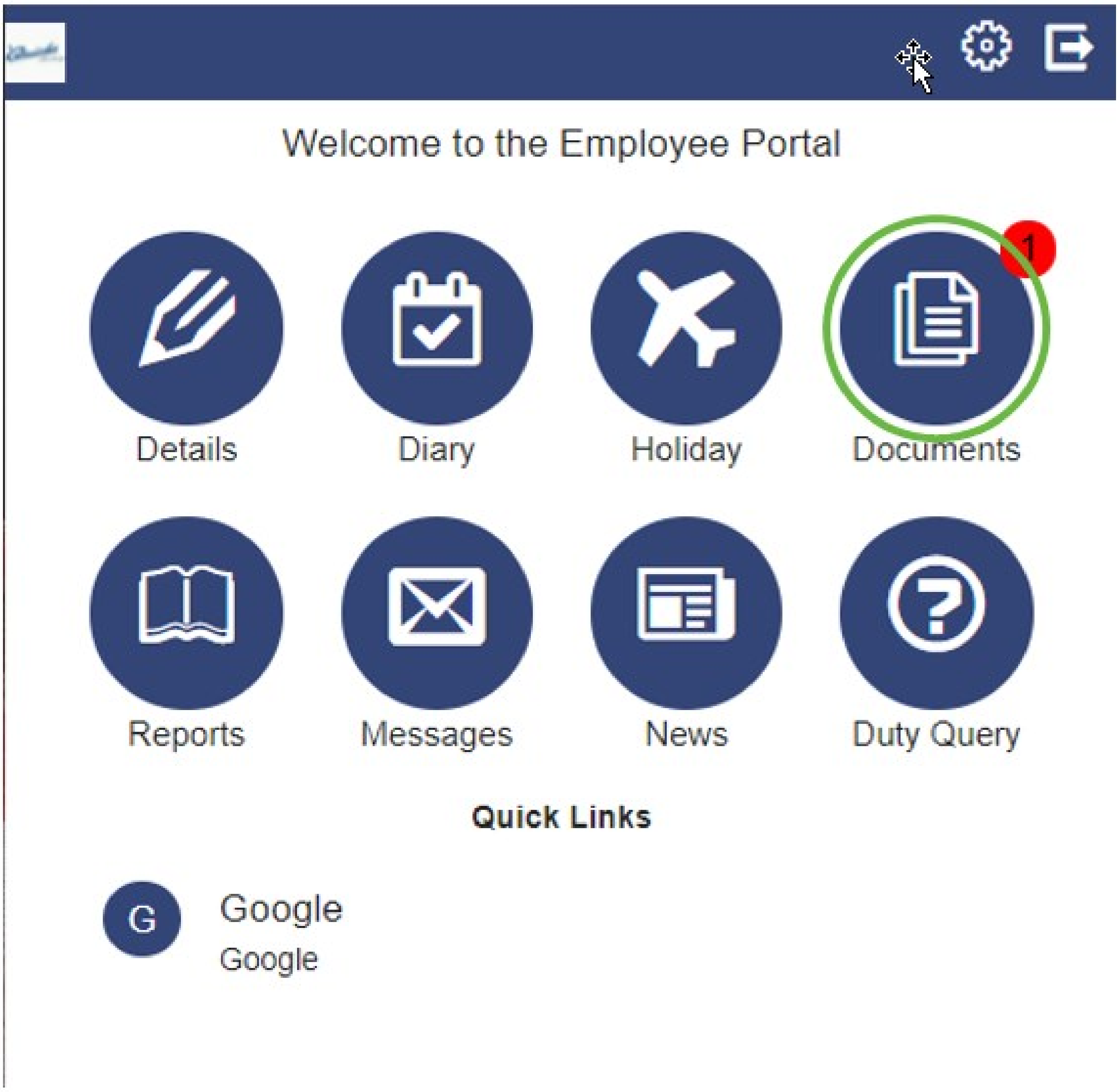
- Select **Questions**.
- This will open a open a **Holiday Question/Query** screen.
- Enter your question/query when prompted
- Select **Save** to submit.

You will then receive messages and emails when your question/query has been actioned/answered.

How do I view documents using the Documents Engagement Task?

Accessing Documents

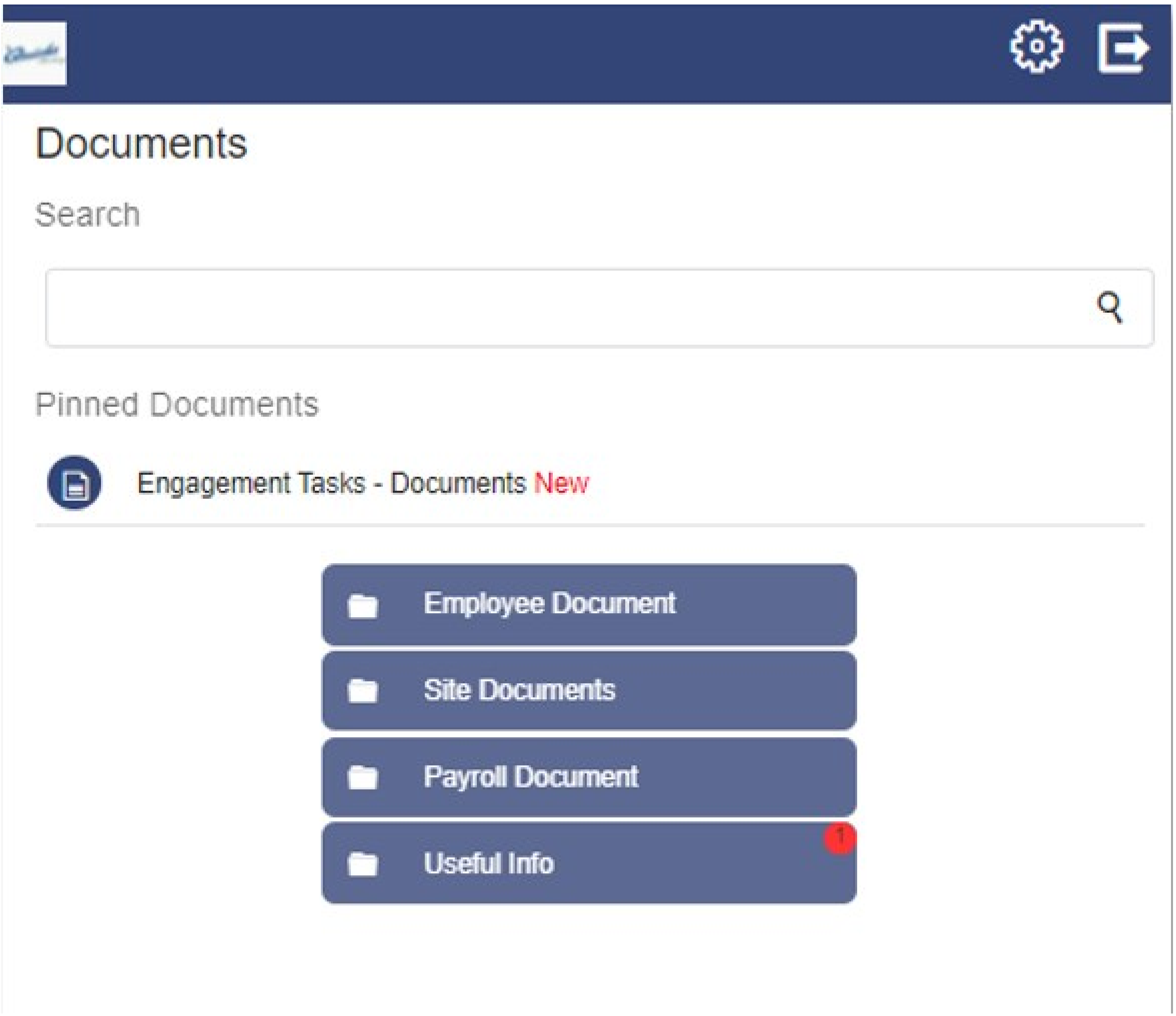
You can view your documents by selecting **Documents** on the Employee Portal home screen:



New documents are highlighted on the **Document** icon

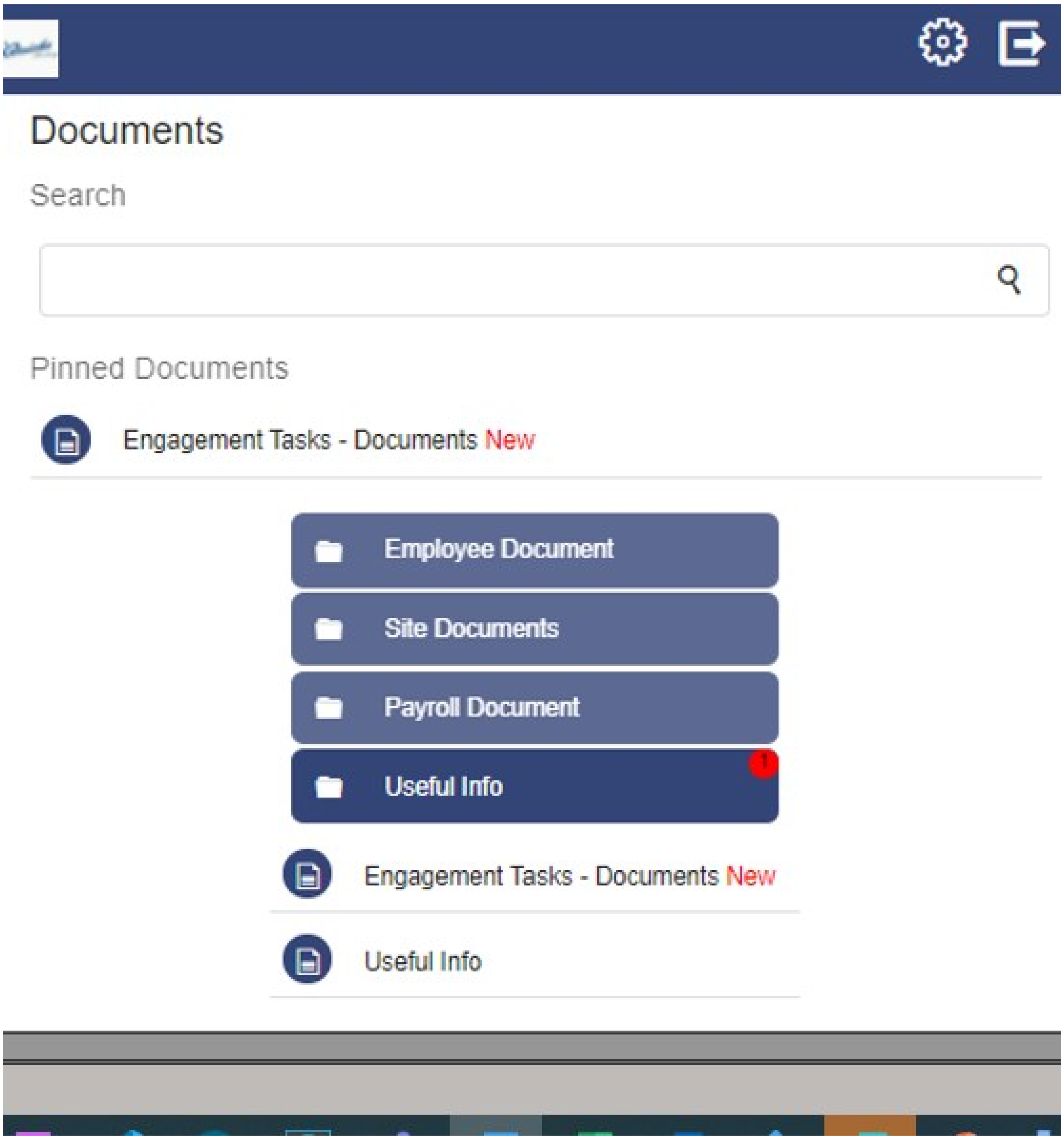
Viewing Documents

After selecting Documents, the Document screen loads. It comprises **Folders** and **Pinned Documents:**



- **Pinned Documents** shows those documents deemed important by your management. They are displayed at the top of the screen
- New documents are highlighted with a red circle on the relevant folder (as shown in "Useful Info" example above)
- Folders may have different names to those shown above. You may also see more or less folders as these are set up individually by your company within Timegate

- To access the documents, select the relevant folder. The documents will be displayed below the folder:

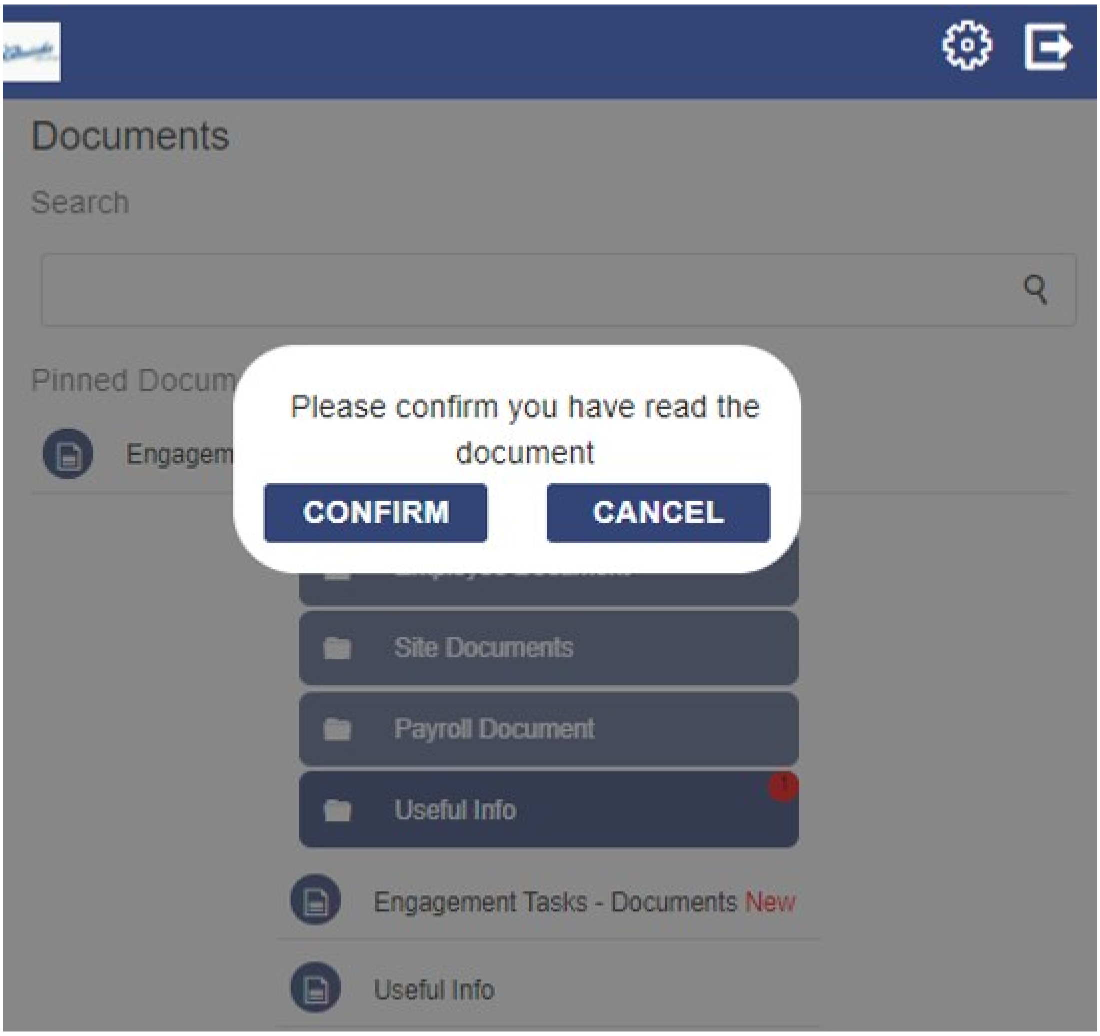


- Select the document to open or download it

> **Please Note:** Some documents may have a read receipt. If this is the case, when viewing you will be prompted to select

Confirmation of Reading

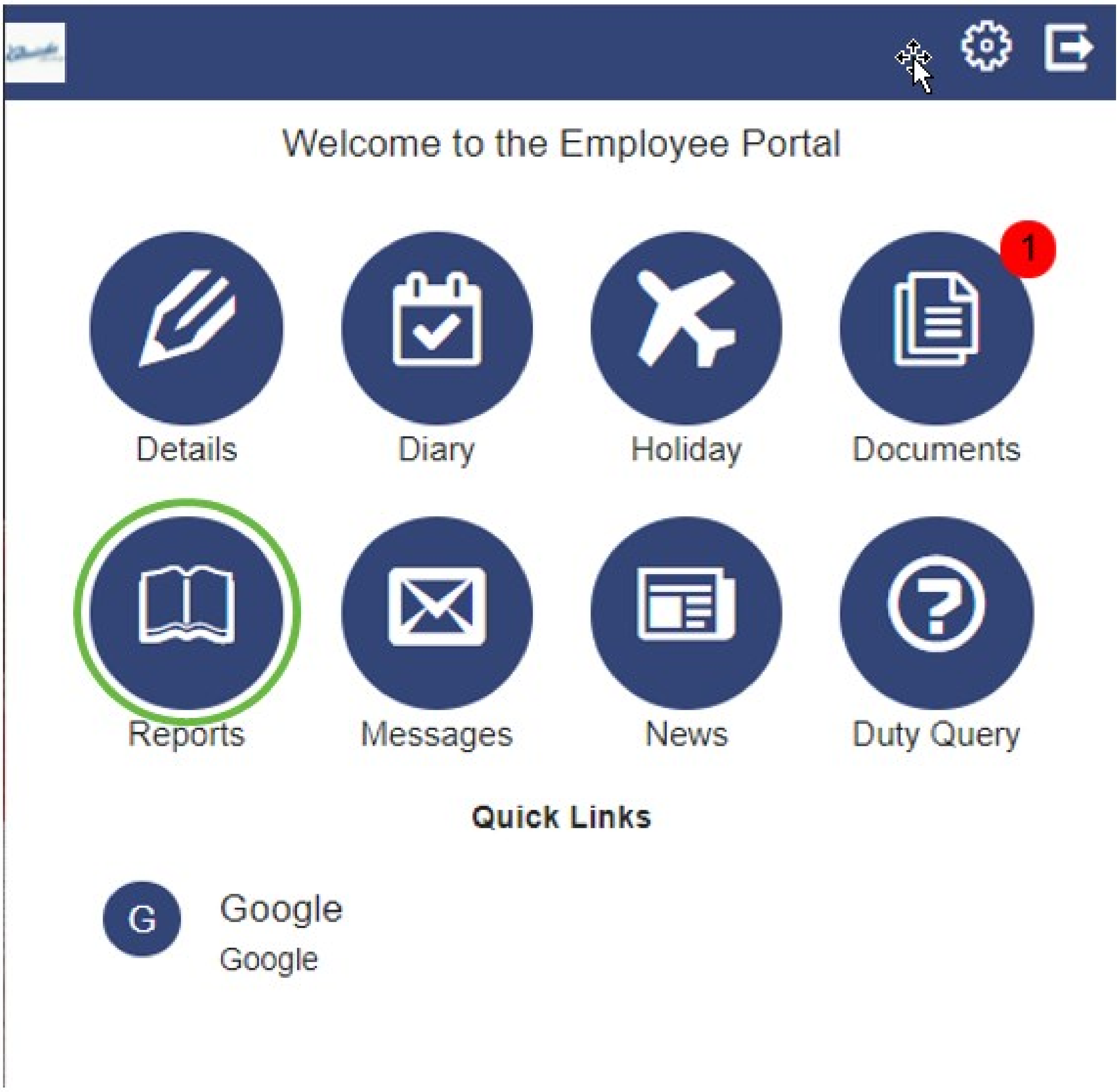
To confirm to your management that you have read a document, select Confirm:


Documents
Search
Pinned Docum
Engagem
Please confirm you have read the document
CONFIRM
CANCEL
Site Documents
Payroll Document
Useful Info
Engagement Tasks - Documents New
Useful Info

How do I view reports using the Reports Engagement Task?

Accessing Reports

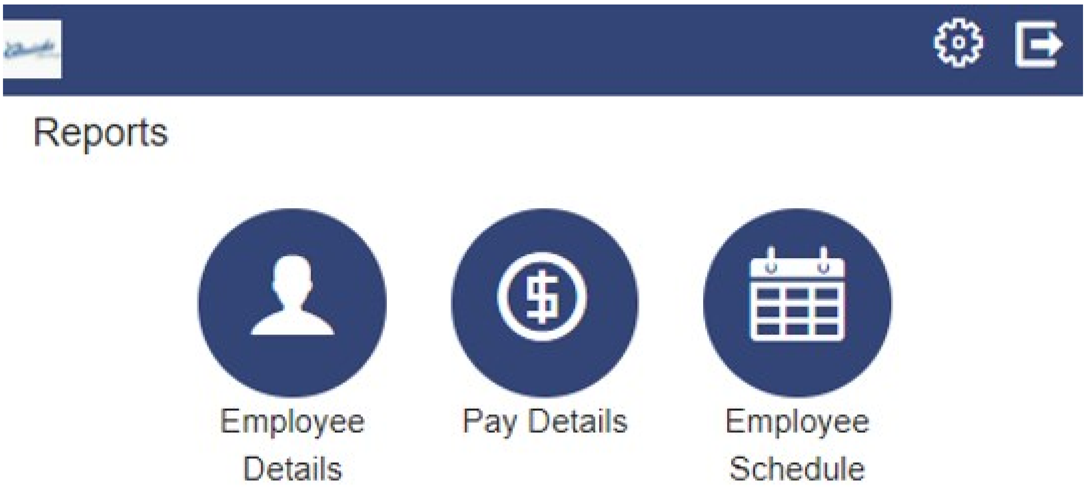
You can view various reports by selecting **Reports** on the **Employee Portal** home screen:



Report Types

There are three different report types. They are:

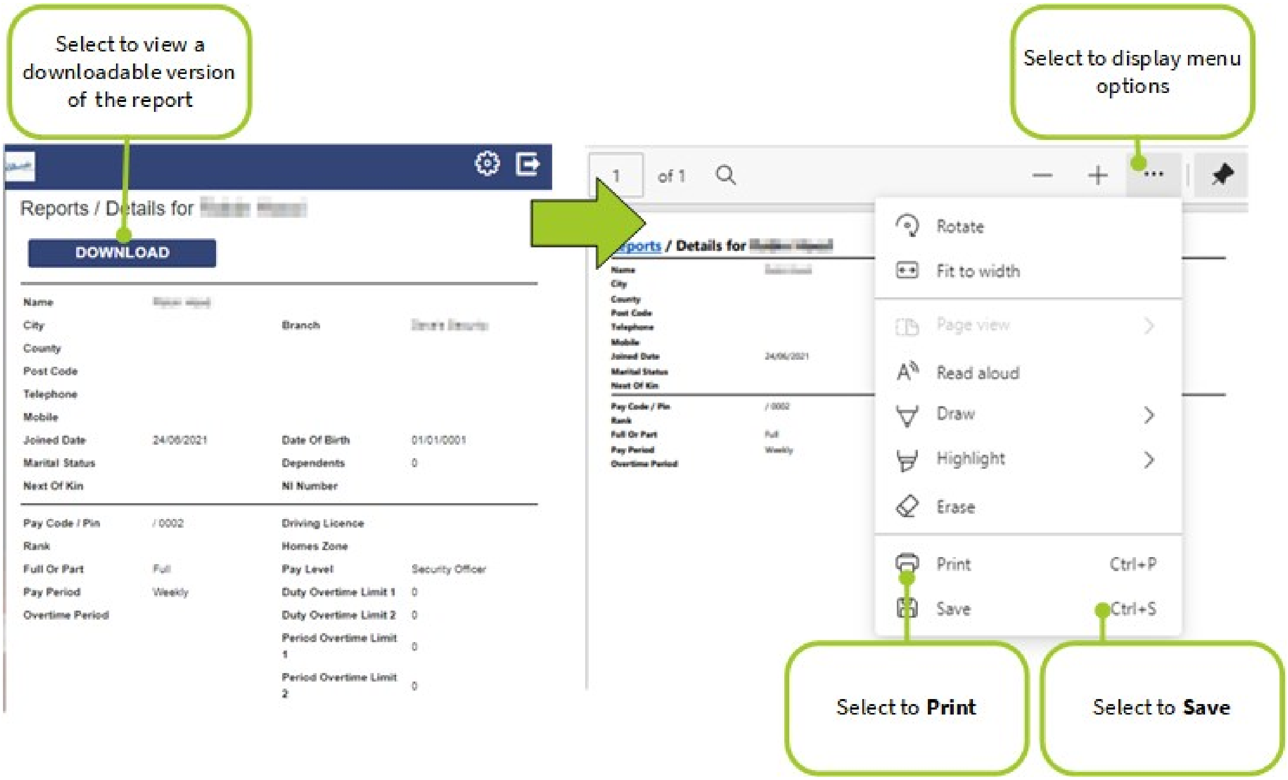
- **Employee Details** – A downloadable version of your details
- **Pay Details** – A downloadable duty report including pay for each duty
- **Employee Schedule** – A downloadable version of your schedule



Select a report icon to view it / display specific date range dialog boxes (as applicable).

Employee Details Report

After selecting **Employee Details** from the main Reports page of the Employee Portal, the report loads:



Select **Download** to open a downloadable / printable version of the report.

When the report is loaded, select ••• to view the options menu. From here you are provided with a series of options, including **Save** and **Print**.

Pay Details Report

After selecting **Pay Details** from the main Reports page of the Employee Portal, you are prompted to specify a date range for the **Pay Details Report**. Select (or enter) a **Start** and **Finish** date.

Select **Create** to create and load the report.

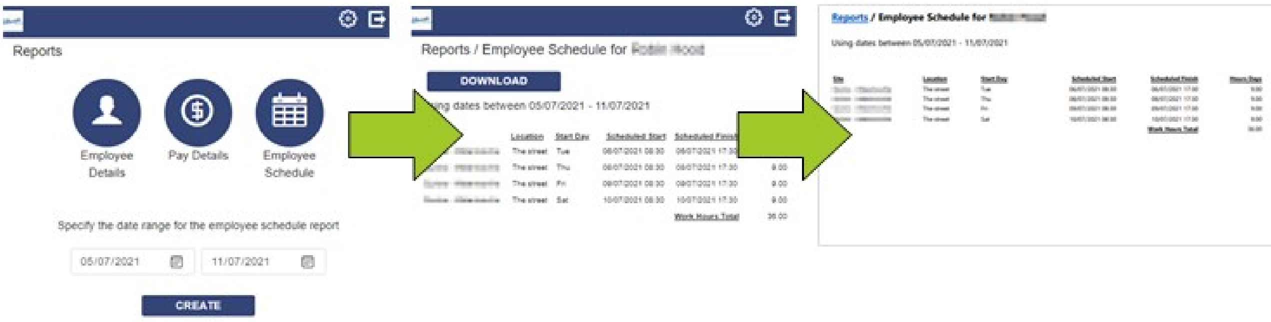
Select **Download** to open a downloadable / printable version of the pay report.

When the report is loaded, select to view the options menu. From here you are provided with a series of options, including **Save** and **Print**.

Employee Schedule Report

After selecting **Employee Schedule** from the main Reports page of the Employee Portal, you are prompted to specify a date range for the **Employee Schedule Report**. Select (or enter) a **Start** and **Finish** date.

Select **Create** to create and load the report.



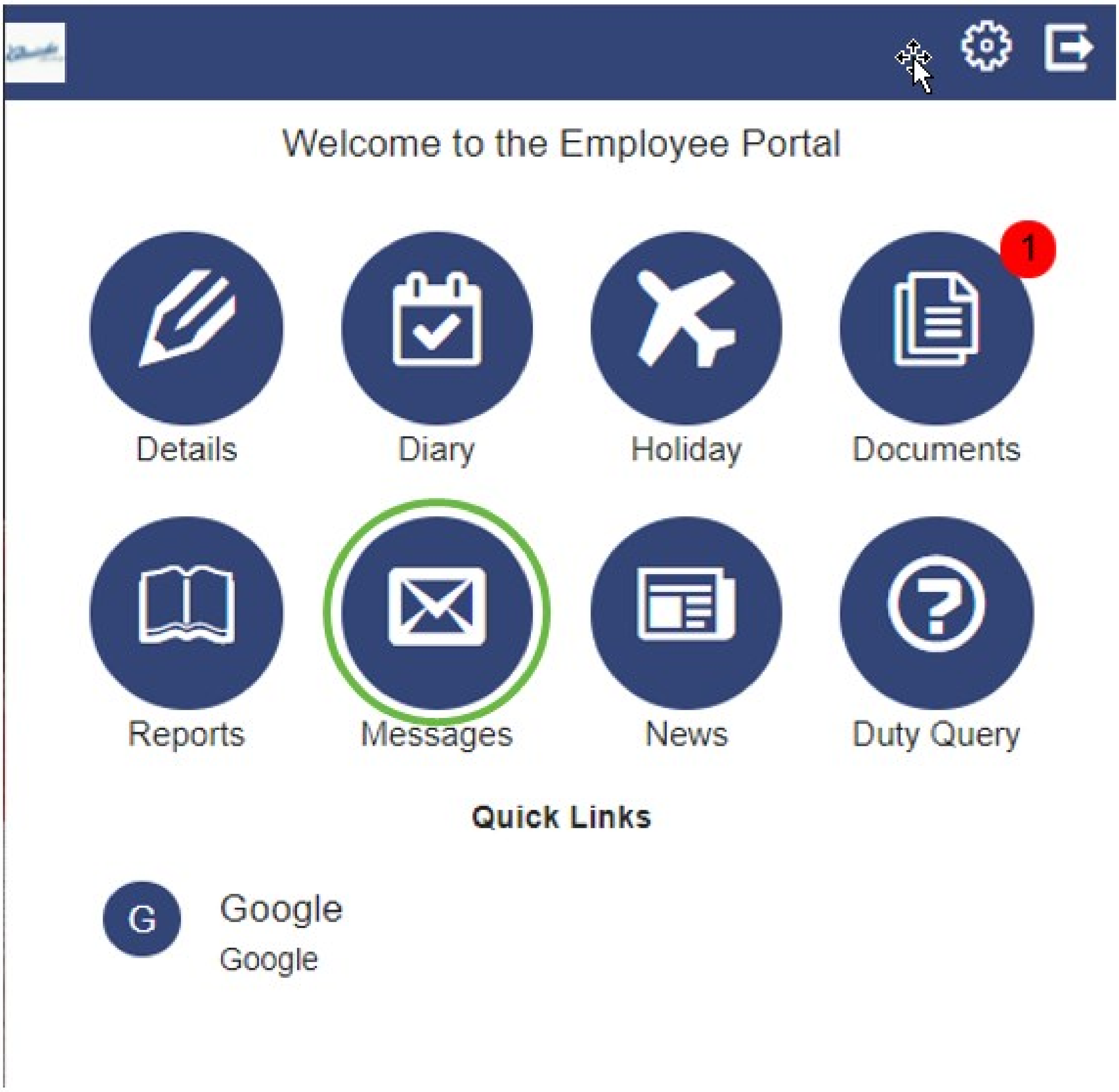
Select **Download** to open a downloadable / printable version of the schedule report.

When the report is loaded, select to view the options menu. From here you are provided with a series of options, including **Save** and **Print**.

How do I manage my messages using the Messages Engagement Task?

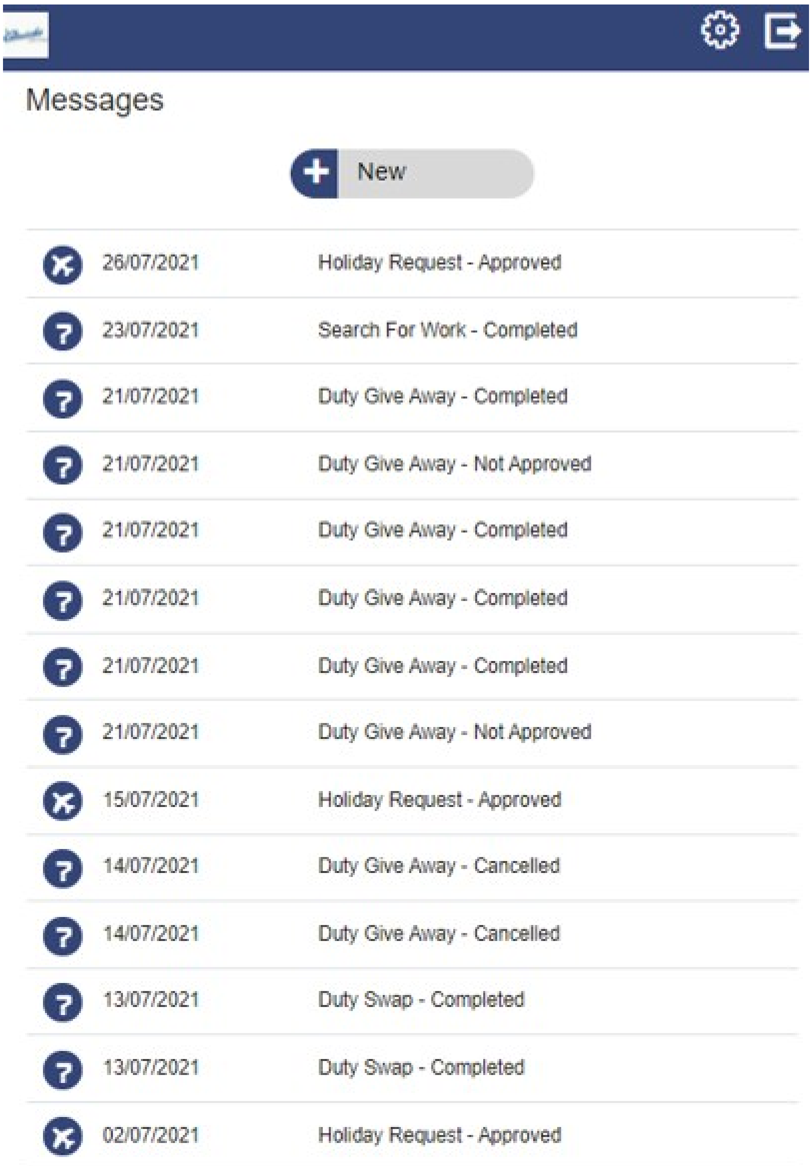
Accessing Messages

You can manage your messages by selecting **Messages** on the **Employee Portal** home screen:

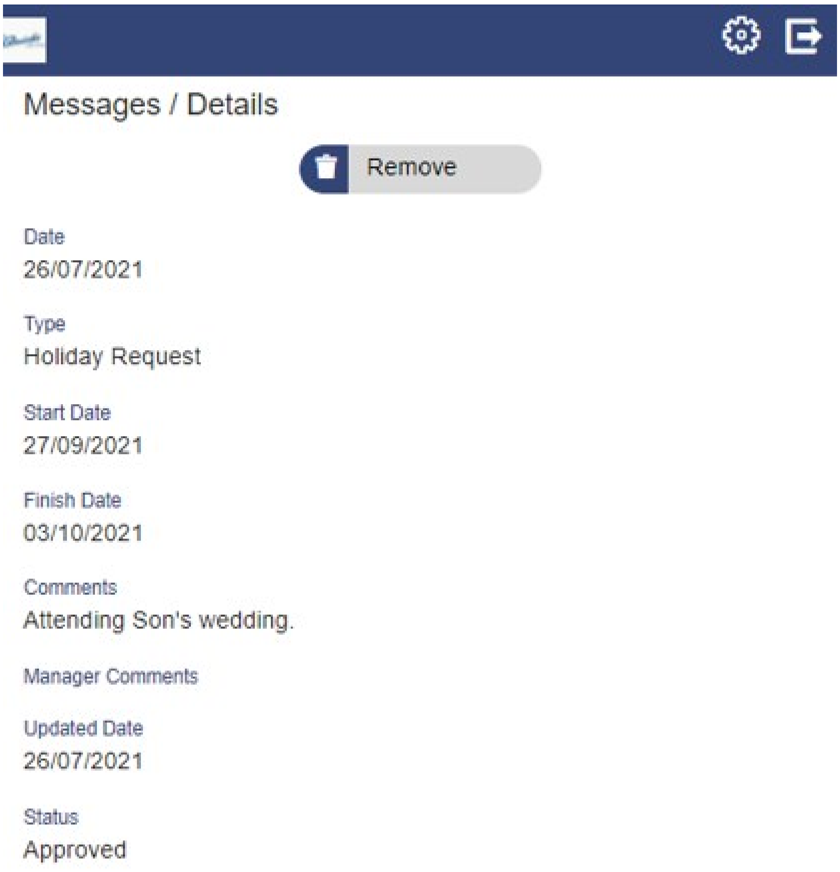


Viewing messages

After selecting **Messages**, you will see a list of messages received:



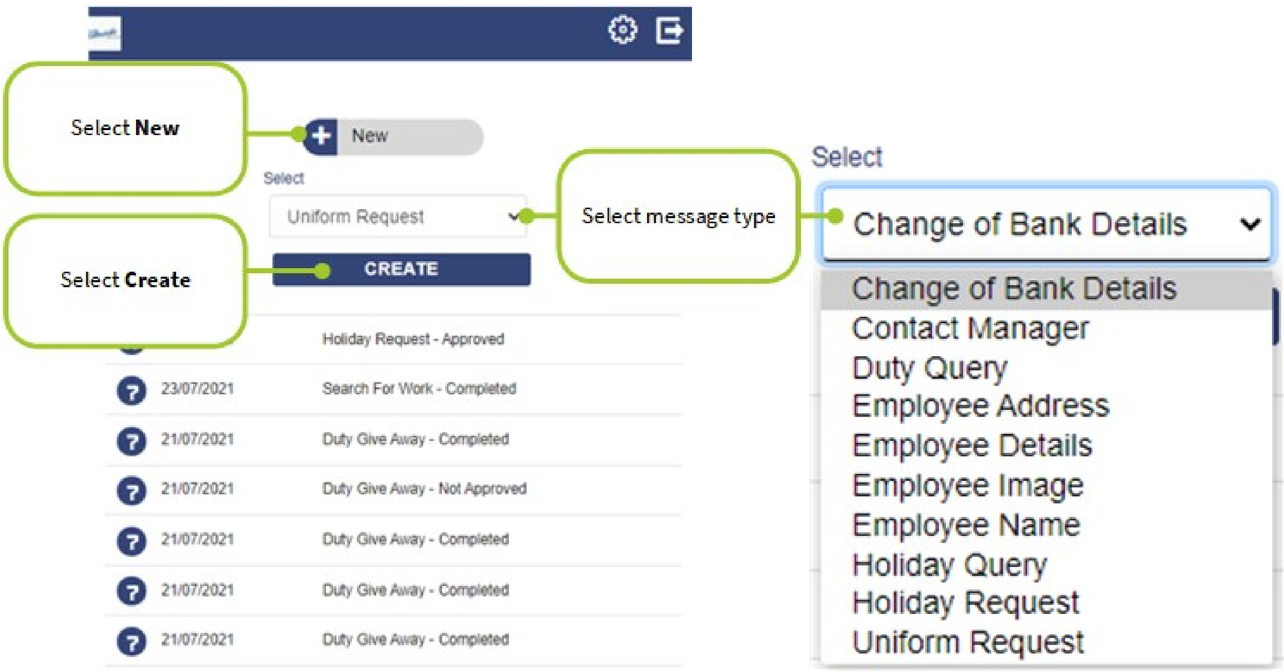
Select any message to see the content:



Delete a message

Once in the message you can select **Remove** to delete a message

Send a message



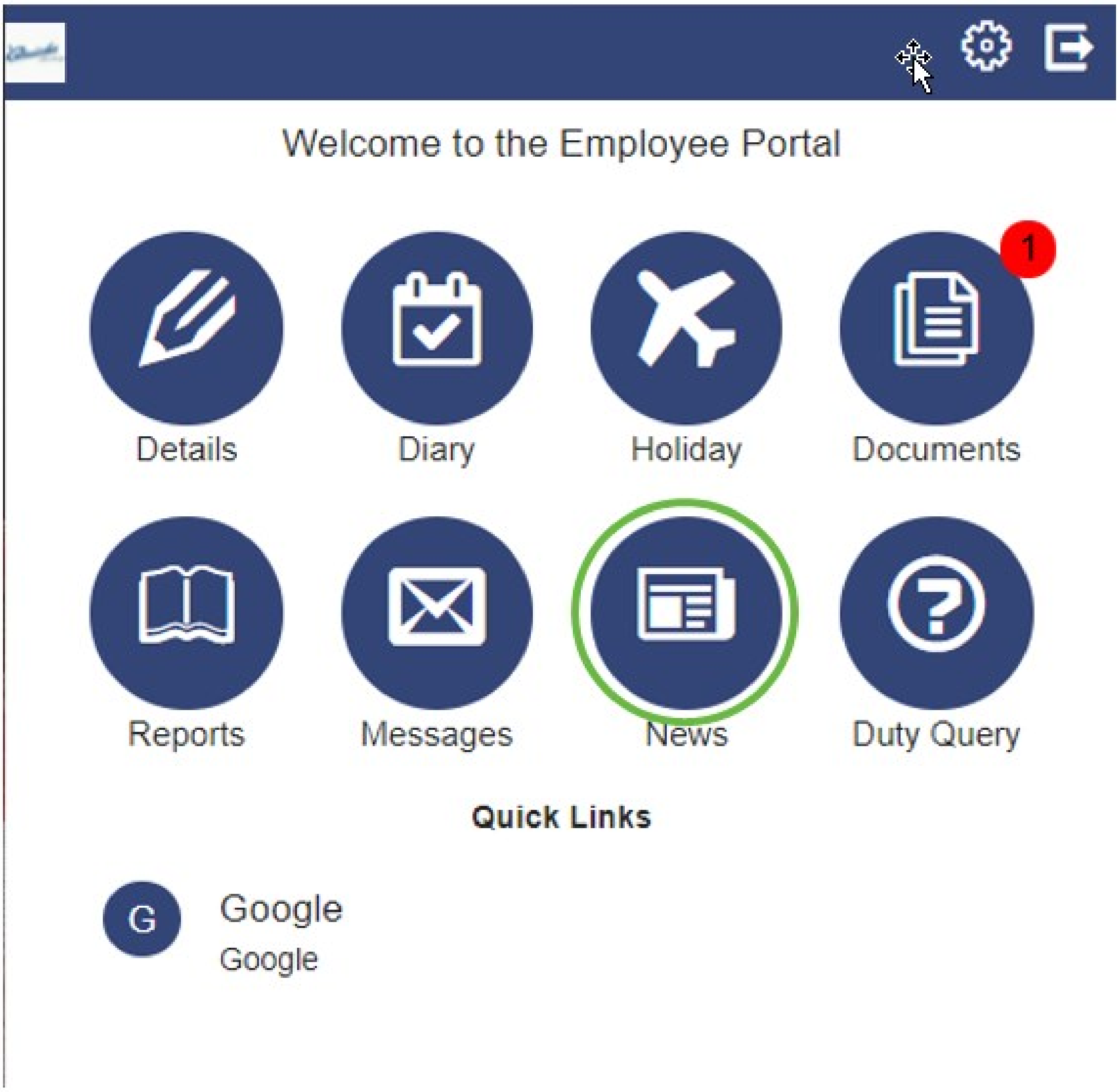
- From the message list, select **New**. This will open a list of message types that you can send.
- Select the message type from the drop down
- Select **Create**. Your chosen question/query message template opens (in this example a **Uniform Request**:

- Follow the guidance displayed as necessary. Enter your message in the **Comments** area
- Select **Save**. You will receive messages and emails when your question/query has been actioned/answered.

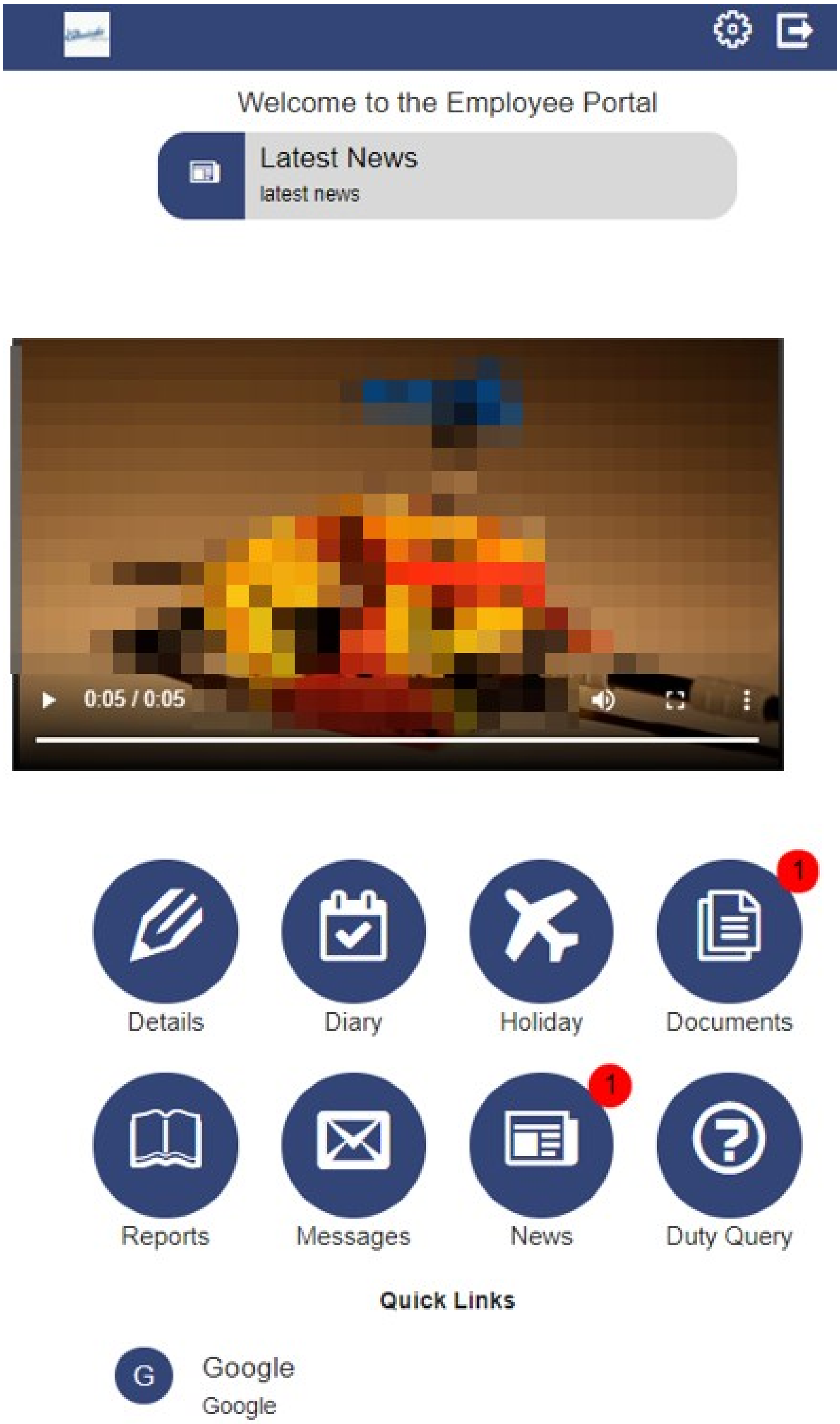
How do I view news using the News Engagement Task?

Accessing News

You can view your company's latest news by selecting **News** on the **Employee Portal** home screen:



You may also see **News** items displayed on the Home Page as shown in this example:

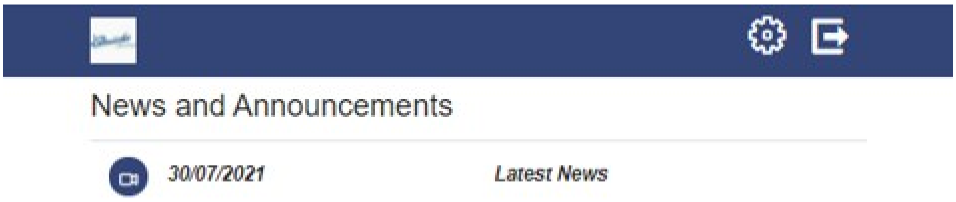


Either select the **News banner** or **News icon** to view **News and Announcements**.

Selecting the banner will take you to the specific article. Selecting the icon will take you to the full **News and Announcements** page.

Viewing the news

From the **News and Announcements** page select the item you wish to view:

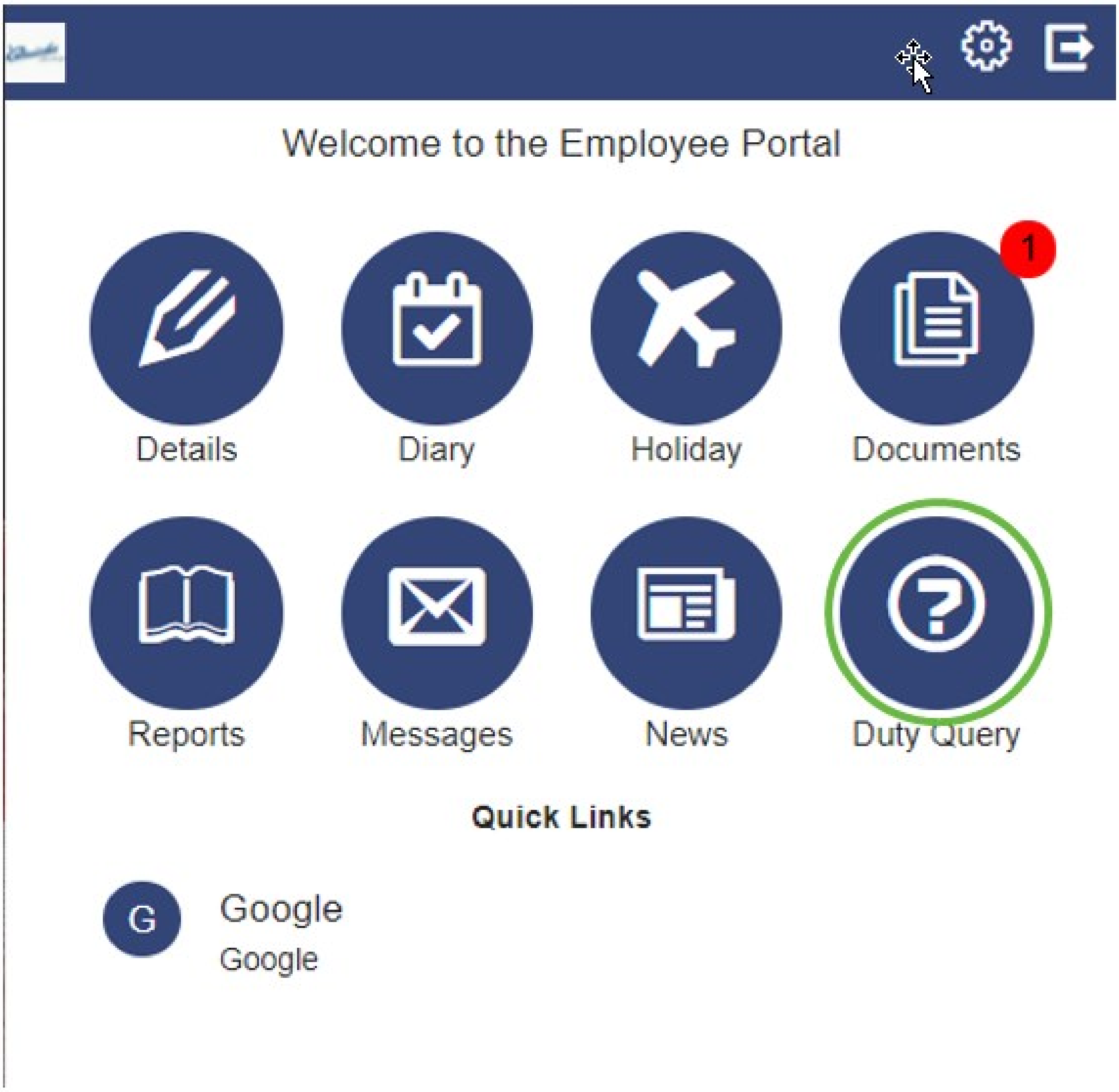


If the news item includes a video clip. select the play button to view the clip:

How do I query a duty using the Duty Query Engagement Task?

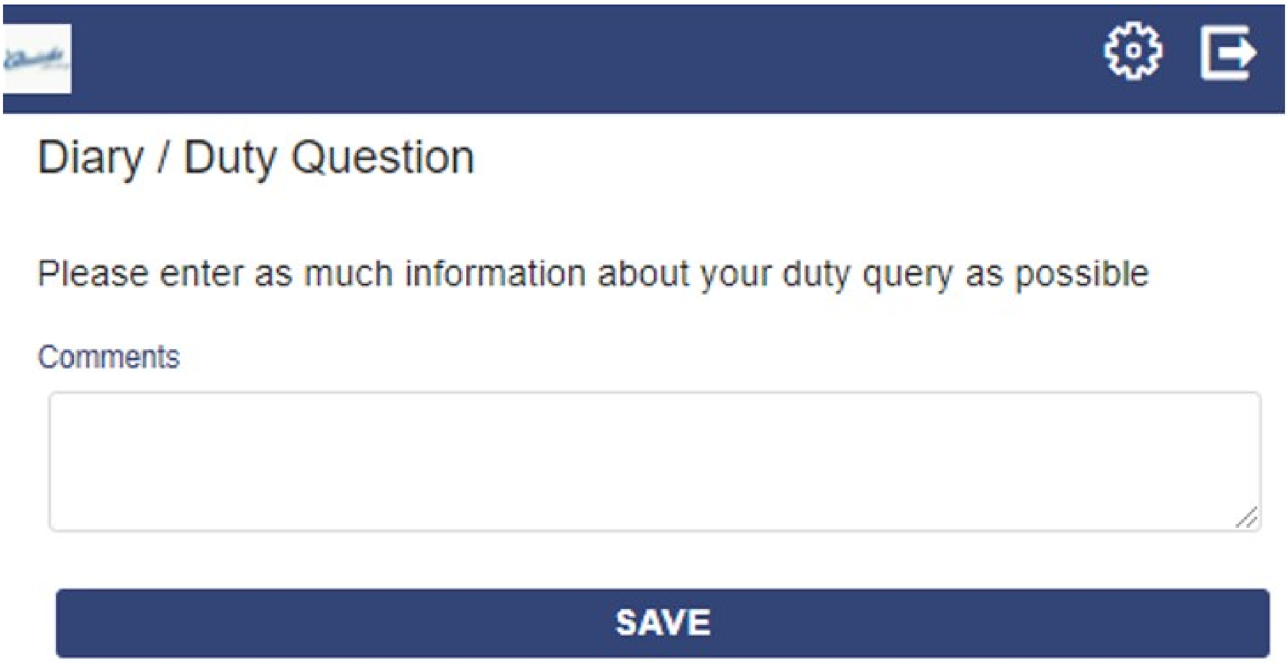
Accessing Duty Query

You can query a duty by selecting **Duty Query** on the **Employee Portal** home screen:



Making and submitting your Duty Query

After selecting **Duty Query**, the following screen loads:



Enter your diary/duty question in the **Comments** space.

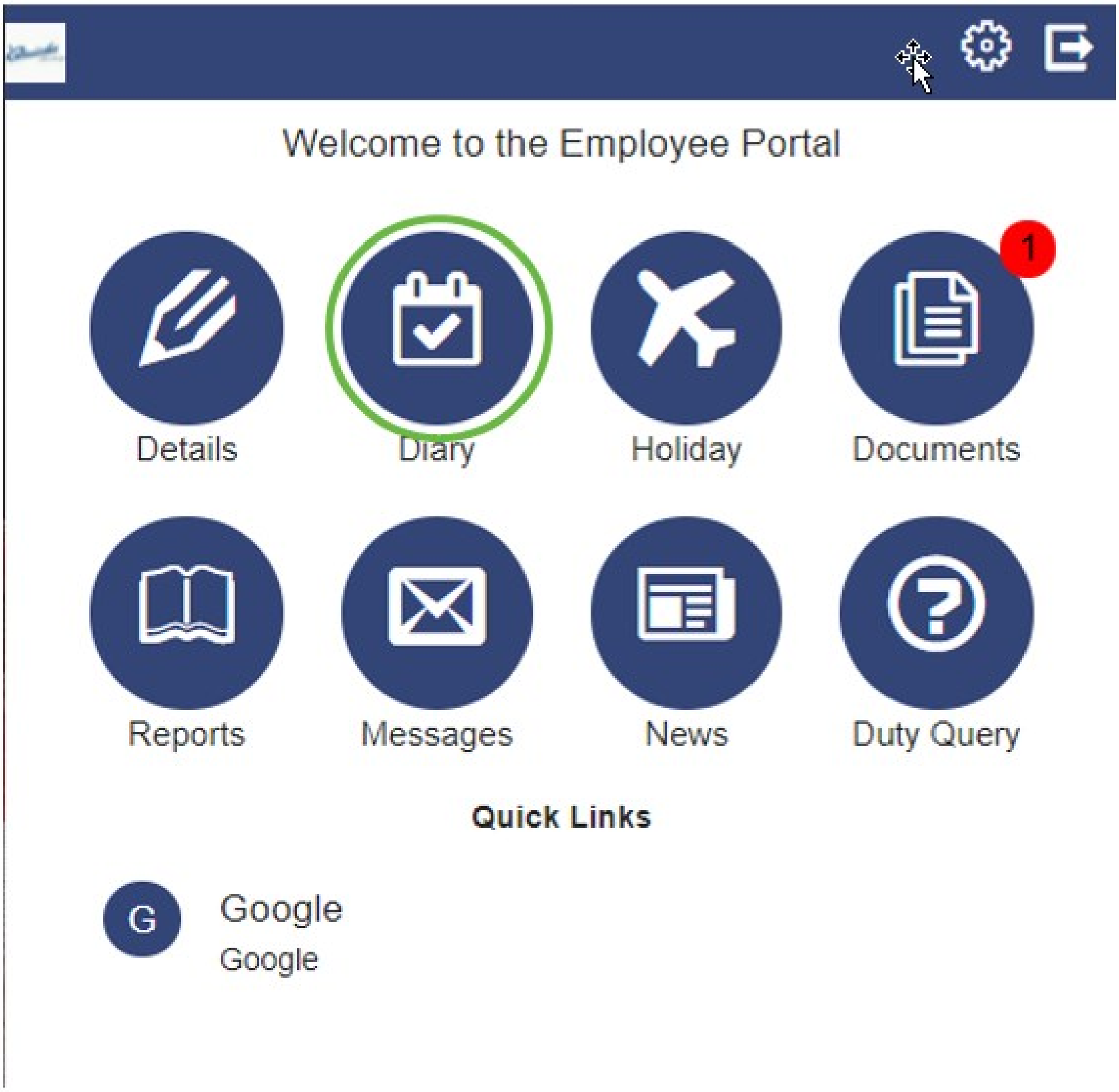
Select **Save** to submit your question.

You will receive messages and emails when your question/query has been actioned/answered.

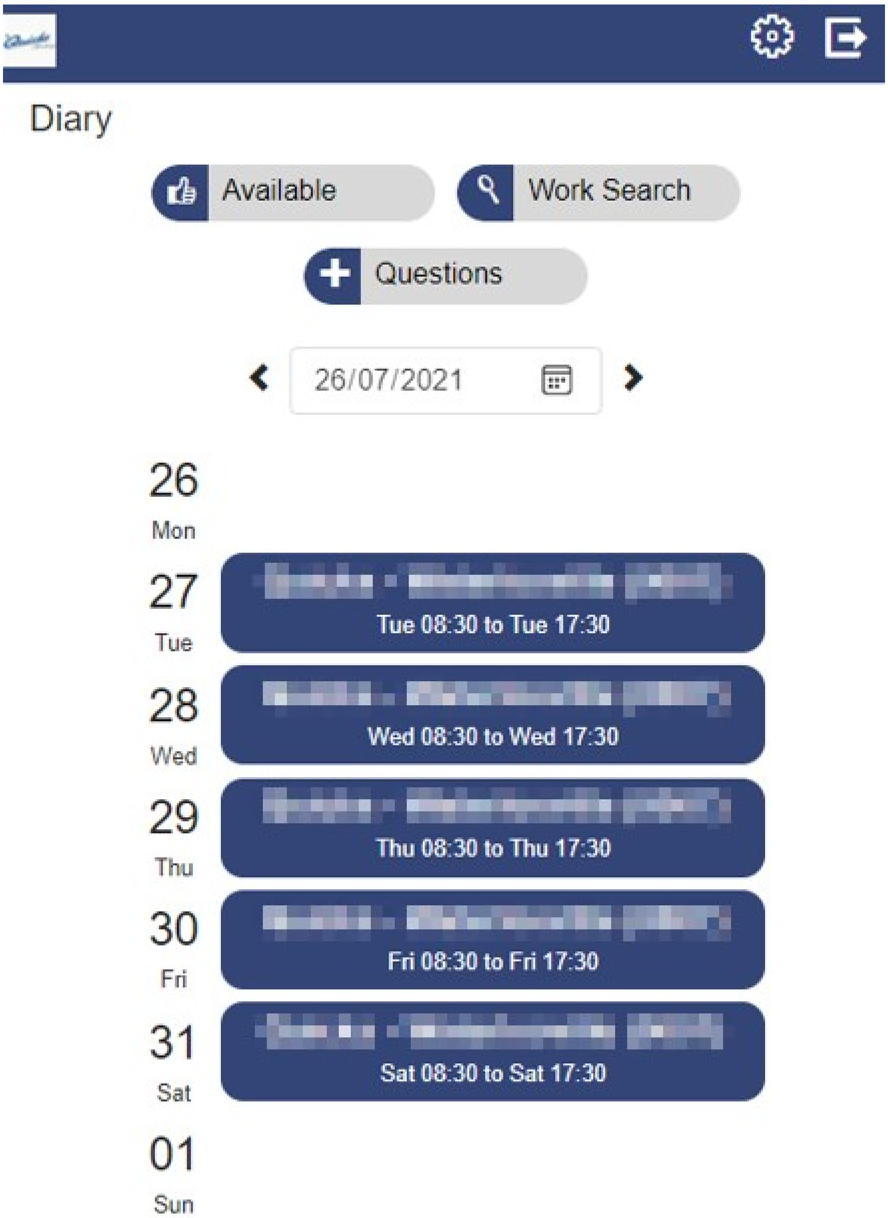
How do I swap a duty in the Employee Portal?

Please Note: Before applying for a duty swap you need to identify the employee and duty that you wish to swap with/into

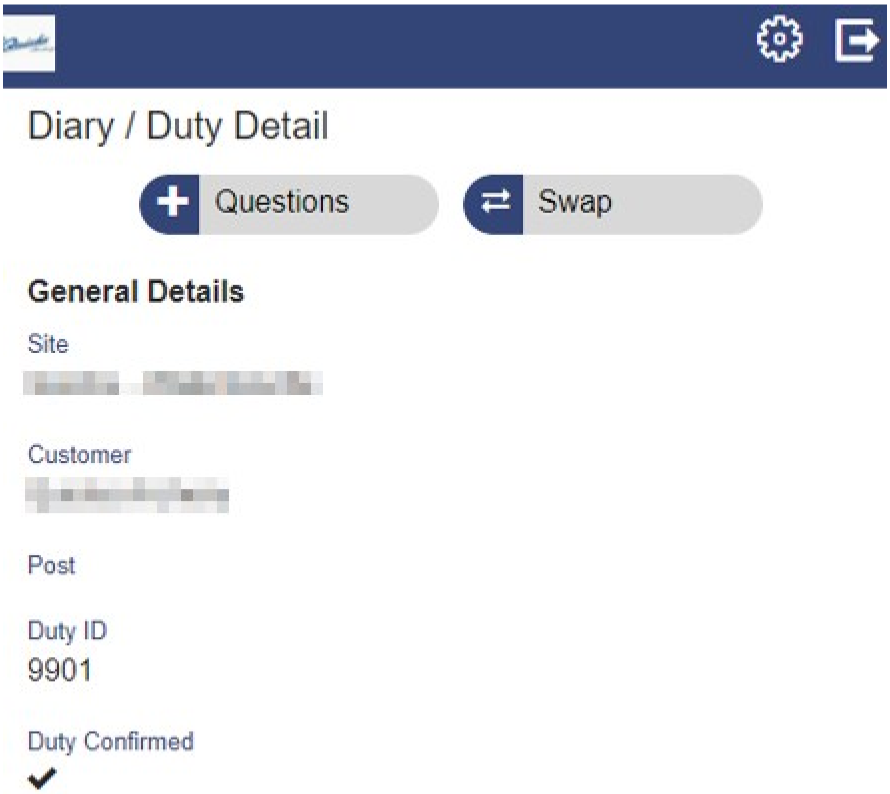
To swap a duty, first you must locate it within your diary. Select **Diary** on the Employee Portal home screen:



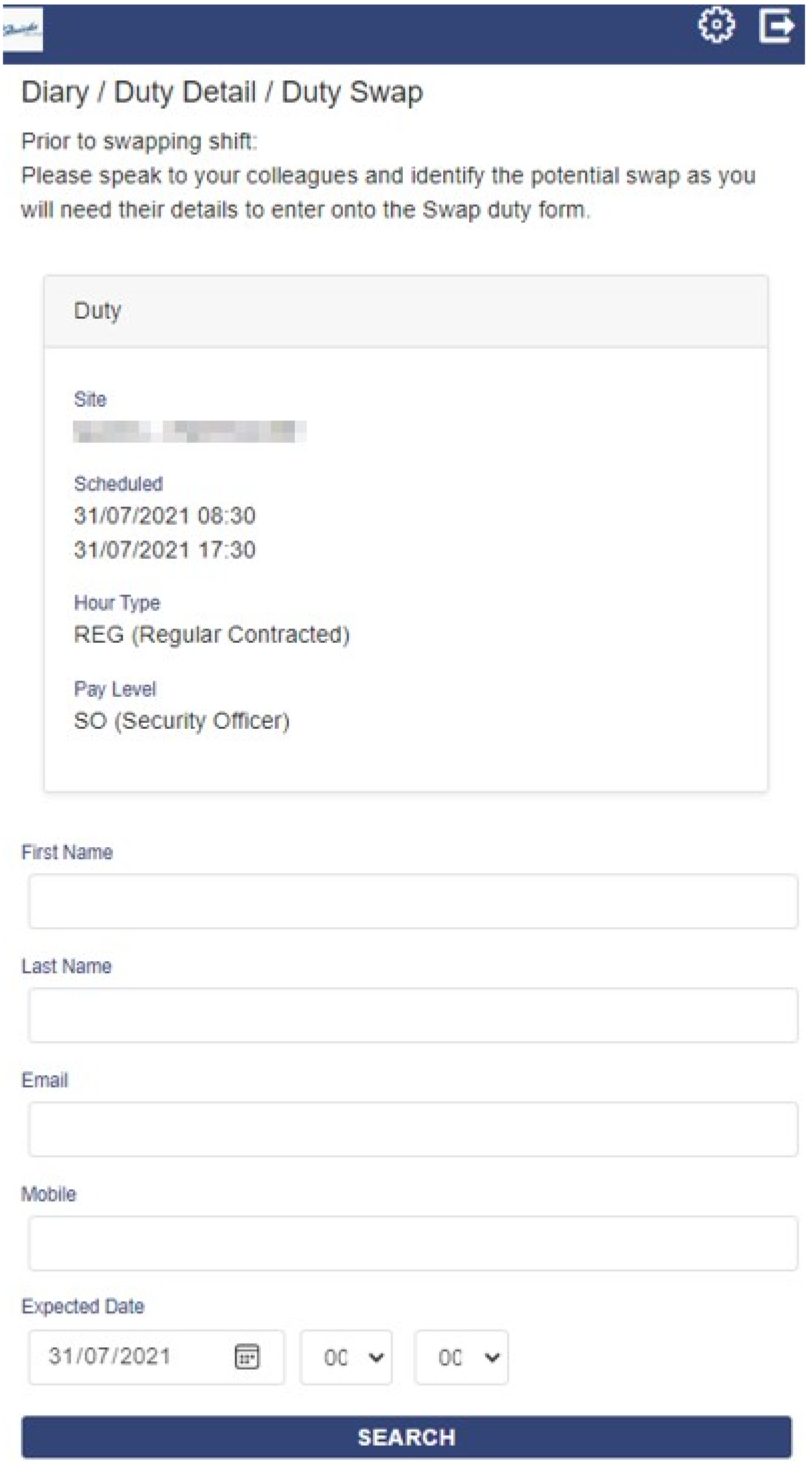
A screen similar to the following will open:



Select the duty you wish to swap out of. A screen similar to the following loads:

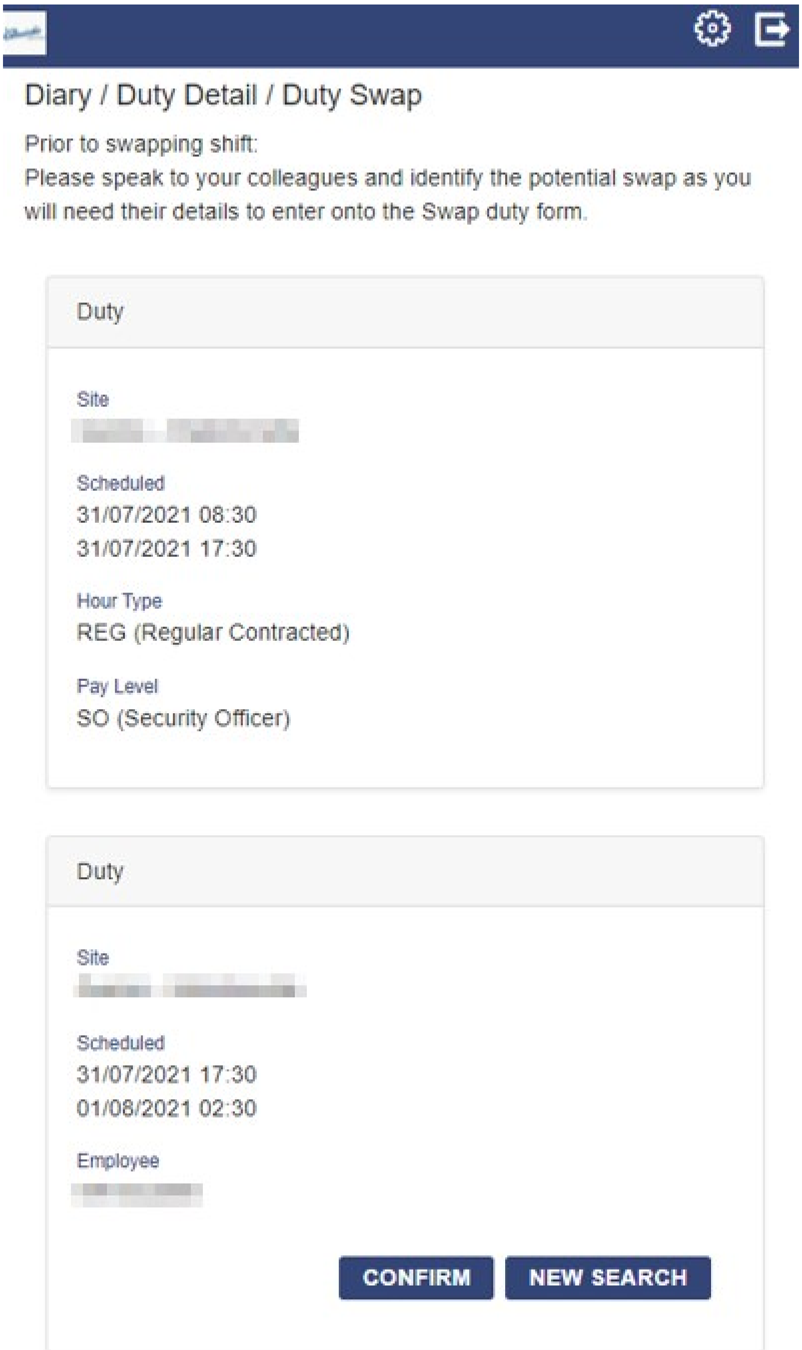


After opening the duty in the **Diary/Duty Detail** view select **Swap** to load the **Diary / Duty Detail / Duty Swap** screen:



Complete the **First Name**, **Last Name**, **Expected Date** and **Time**. Optionally, also include **Email** and **Mobile** details.

Select **Search** (loads a confirmation screen):



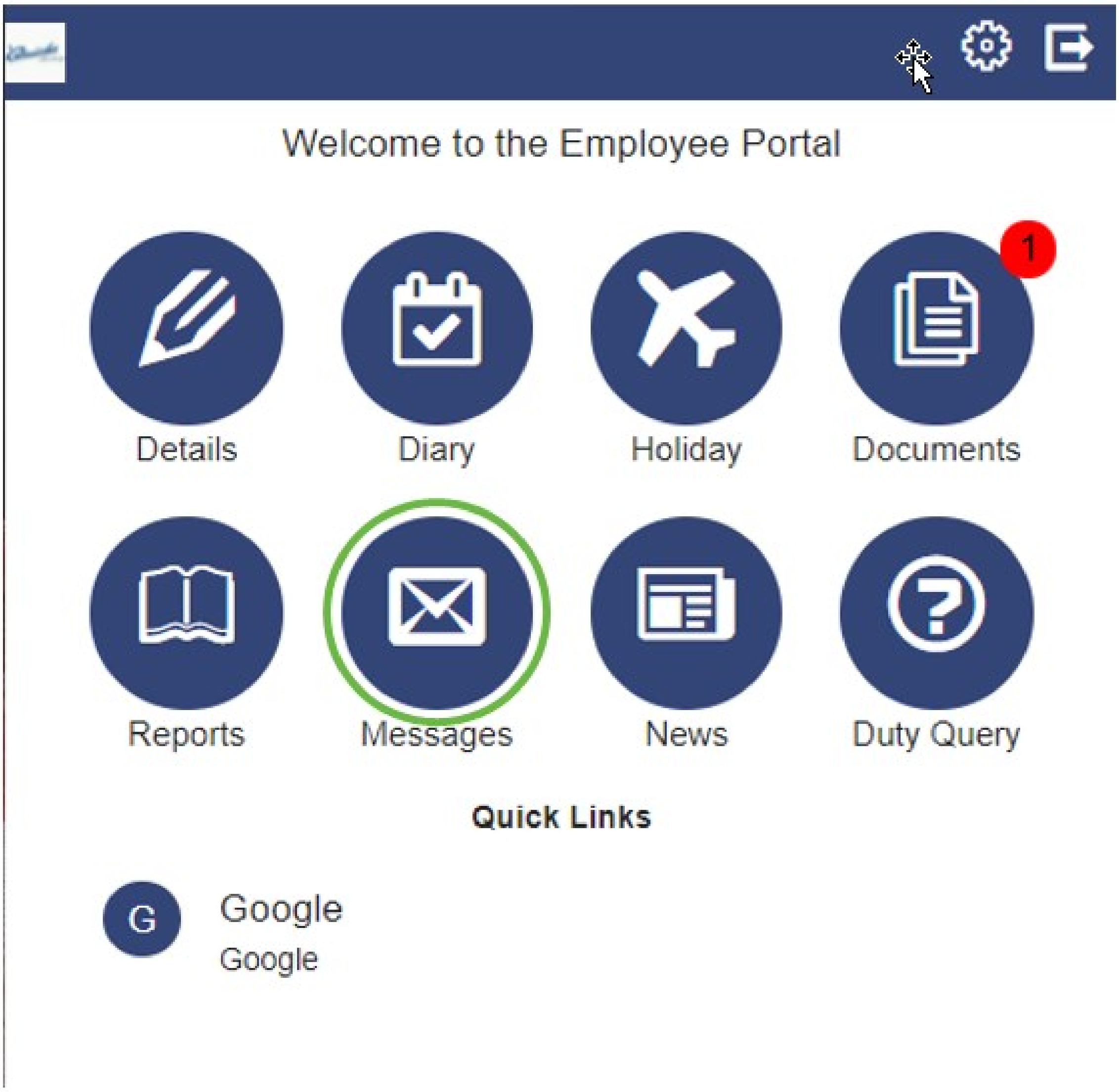
Select **Confirm** to initiate the duty swap. The **Duty Swap Request** is sent to the employee you wish to swap with. It is also sent to the relevant person in your company who will approve/reject the duty swap.

> **Please Note:** The other employee needs to approve the duty swap prior to your manager/supervisor approving/rejecting the duty.

You will receive messages in the Employee Portal throughout the duty swap process. If successful, and approved, you will receive a message and see that your duty has changed in your diary.

How do I accept a duty swap in the Employee Portal?

When a duty swap request is made, you will receive a message where you can accept of reject the swap offer. Select **Messages** on the **Employee Portal** home screen to view your messages:



The **Messages** screen opens ready to locate the message and accept/reject it:

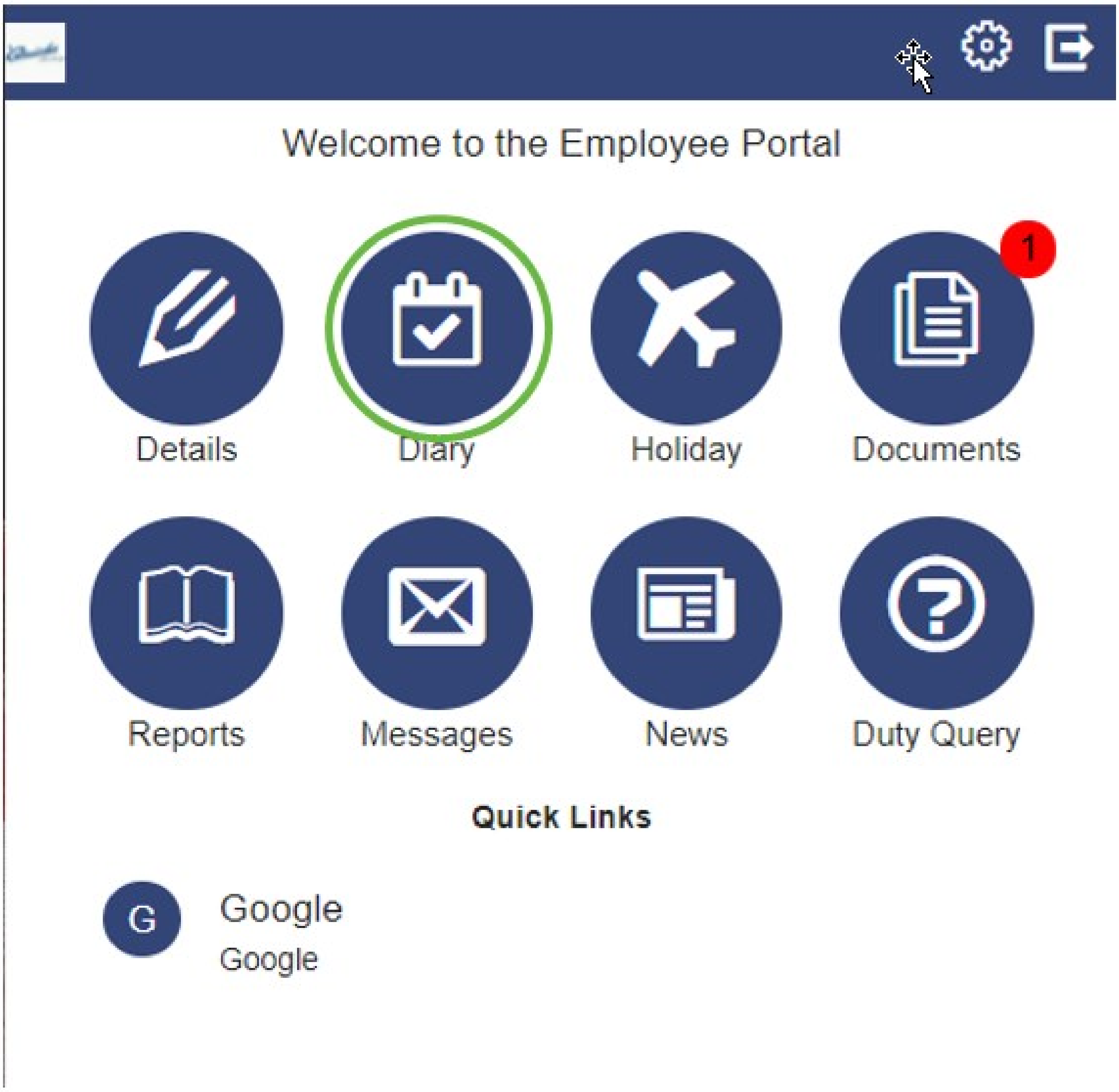
- Select the **Duty Swap** message to view it
- Select **Accept** to accept the duty. If you decide not to accept the duty, select **Reject**

- Once you have accepted or rejected the message, you will see the status of the swap change. Additionally, a **Successfully Submitted** message is displayed at the top of the page.

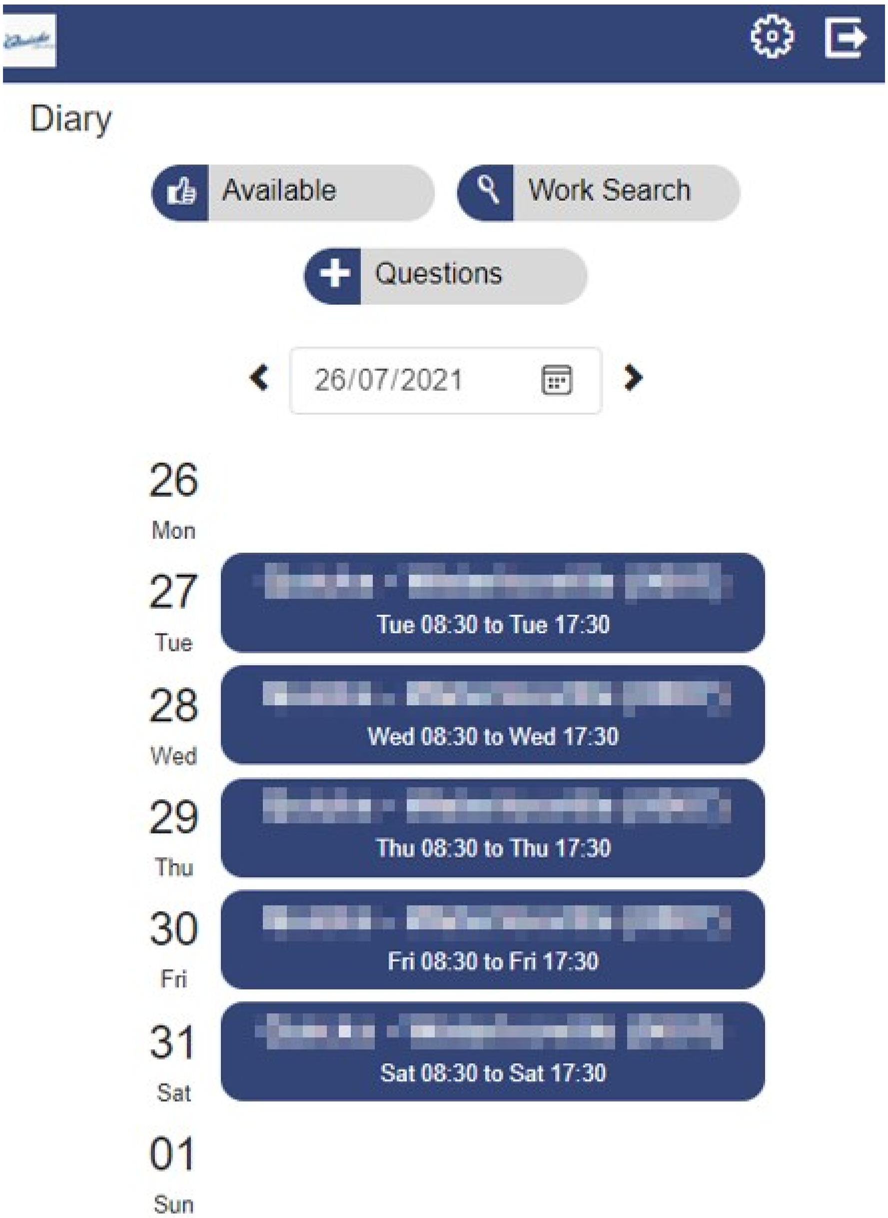
Please Note: You will receive messages in the Employee Portal throughout the process. If successful, and approval has been completed, you will receive a message to notify you. Your duty will also change in the diary.

How do I give away a duty in the Employee Portal?

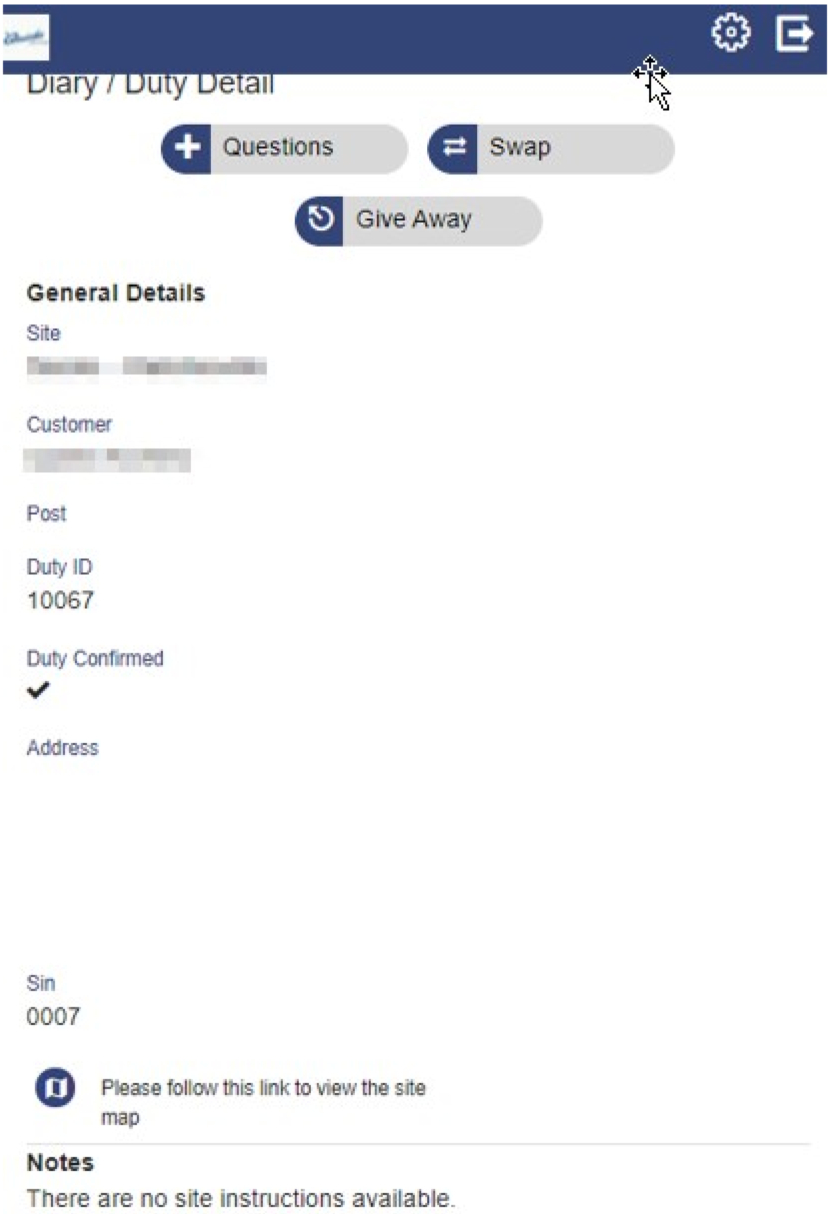
To give away a duty, first you must locate it within your diary. Select **Diary** on the Employee Portal home screen:



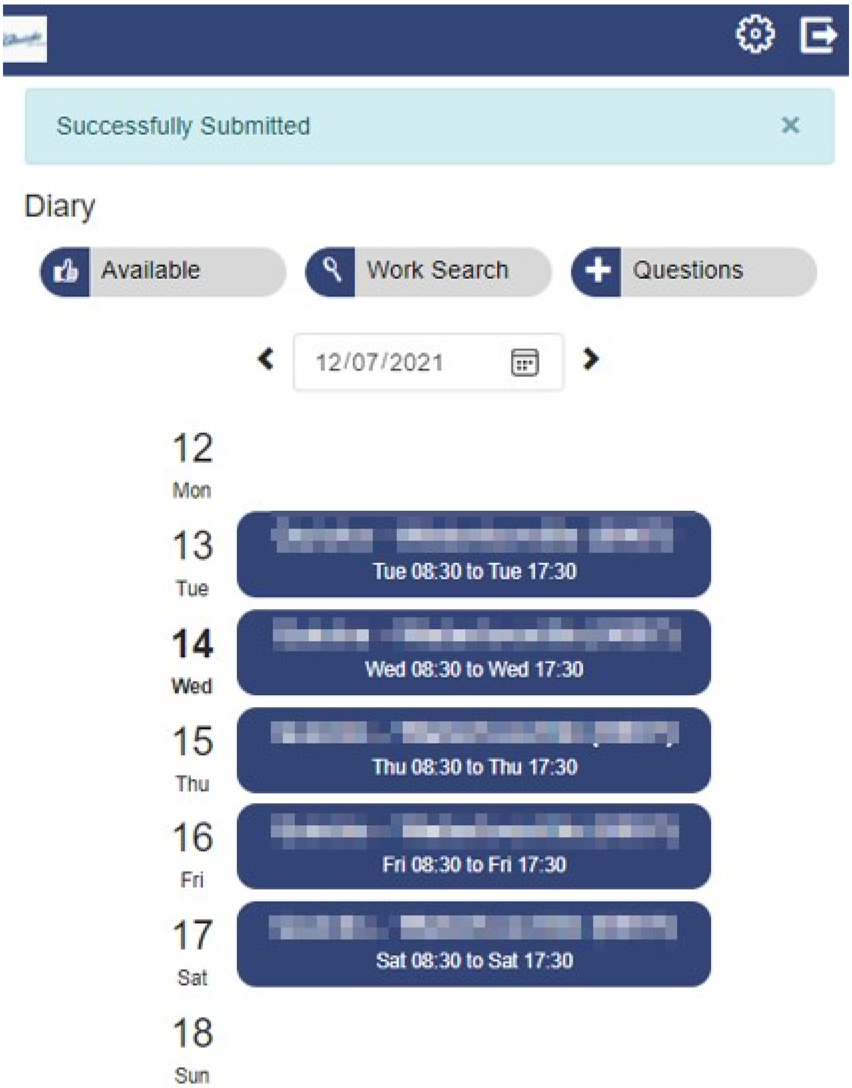
A screen similar to the following will open:



Select the duty you wish to swap out of. A screen similar to the following loads:



After opening the duty in the **Diary/Duty Detail** view select **Give Away**. At the top of the Employee Portal the **Successfully Submitted** message will be displayed:



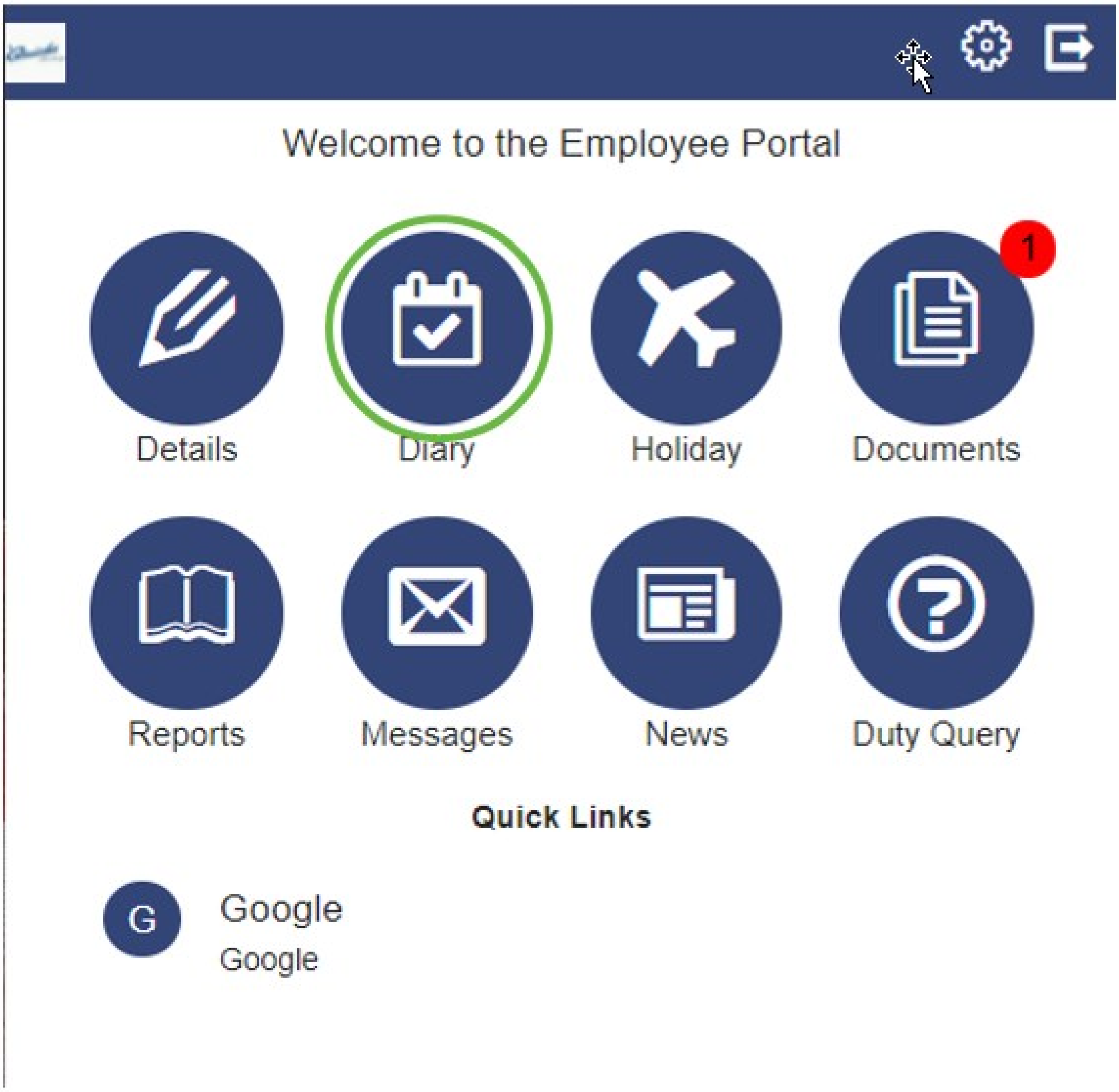
The **Duty Give Away** request has now been send out to all employees. They will see it as available when they do a Work Search. Once a fellow employee agrees to undertake the duty, a task will go to the relevant person in your company (i.e. your manager / supervisor / scheduler) who will approve/reject the duty change.

Please Note: Another employee needs to agree to **Pick Up** the shift prior to the appropriate person putting final approval/rection onto the duty change. Until the change has been approved you are committed to working the shift.

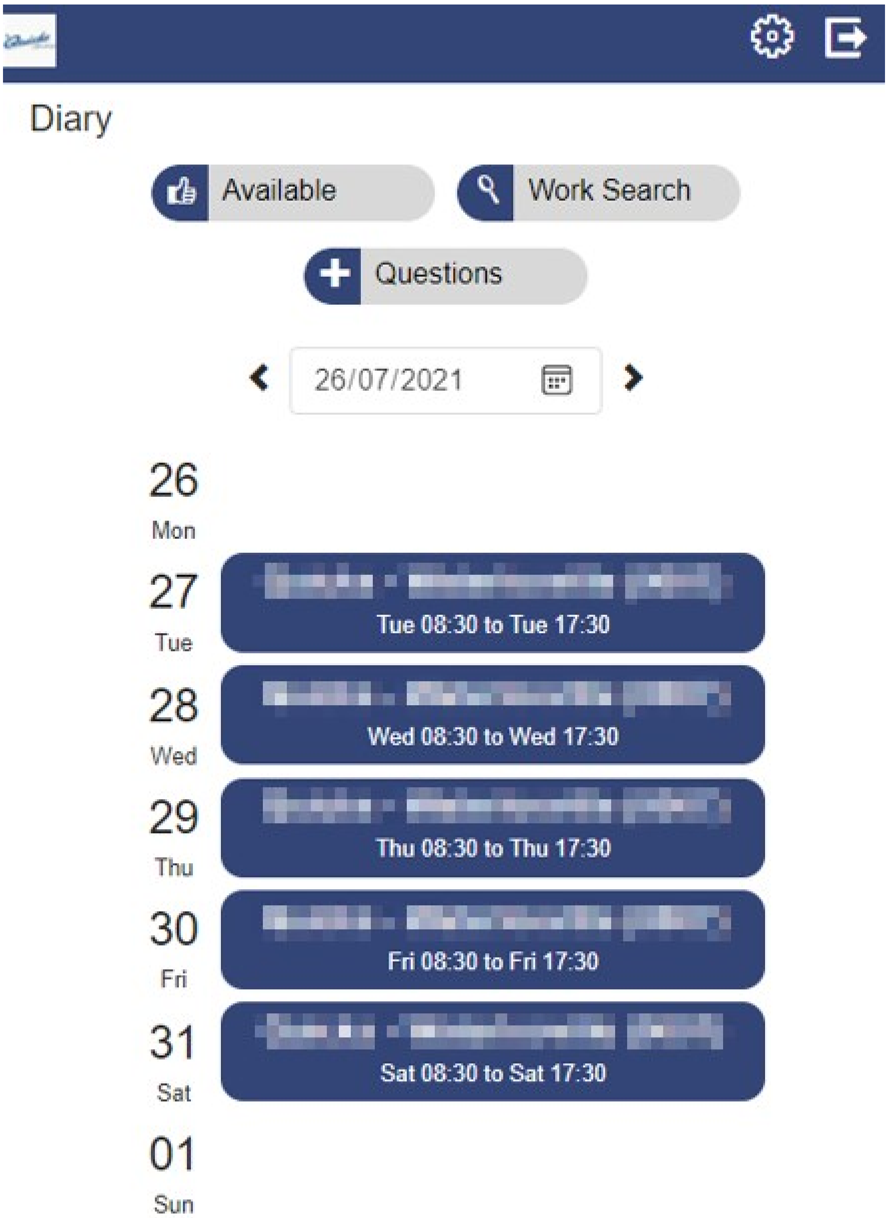
You will receive messages in the Employee Portal throughout the process. If successful, and an approval has been given, you will receive a message confirming the give away. You will also be able to see that the duty has changed in your diary.

How do I search for work and pick up a duty in the Employee Portal?

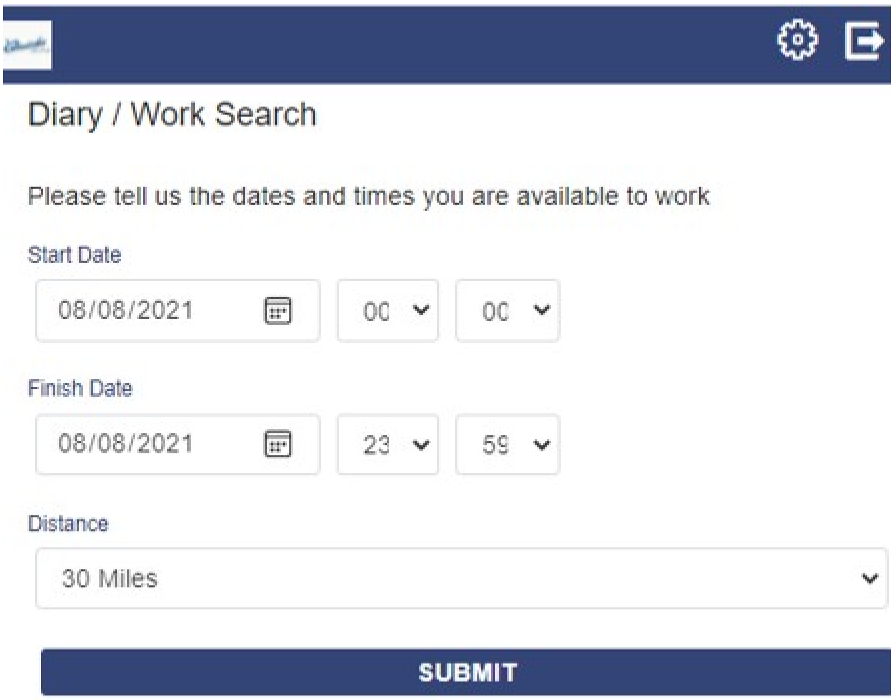
In the Employee Portal an employee can carry out a **Work Search** to see any available duties. The duties that they will see include those that have been entered as a **Duty Give Away**. To carry out a **Work Search**, first you must open your diary. Select **Diary** on the Employee Portal home screen:



A screen similar to the following will open:



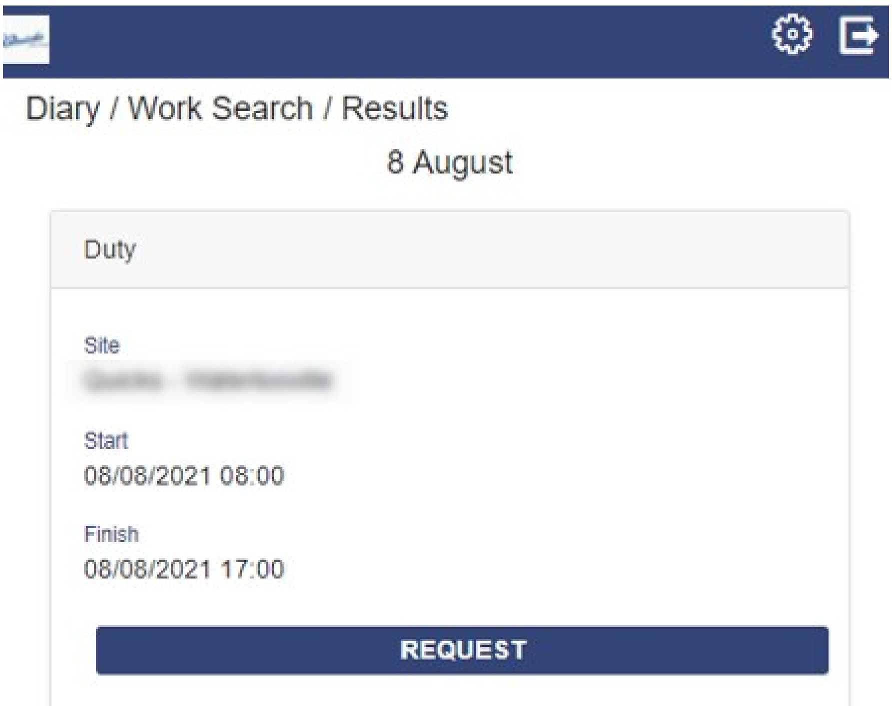
Select **Work Search**. This opens the screen where you can search for open duties:



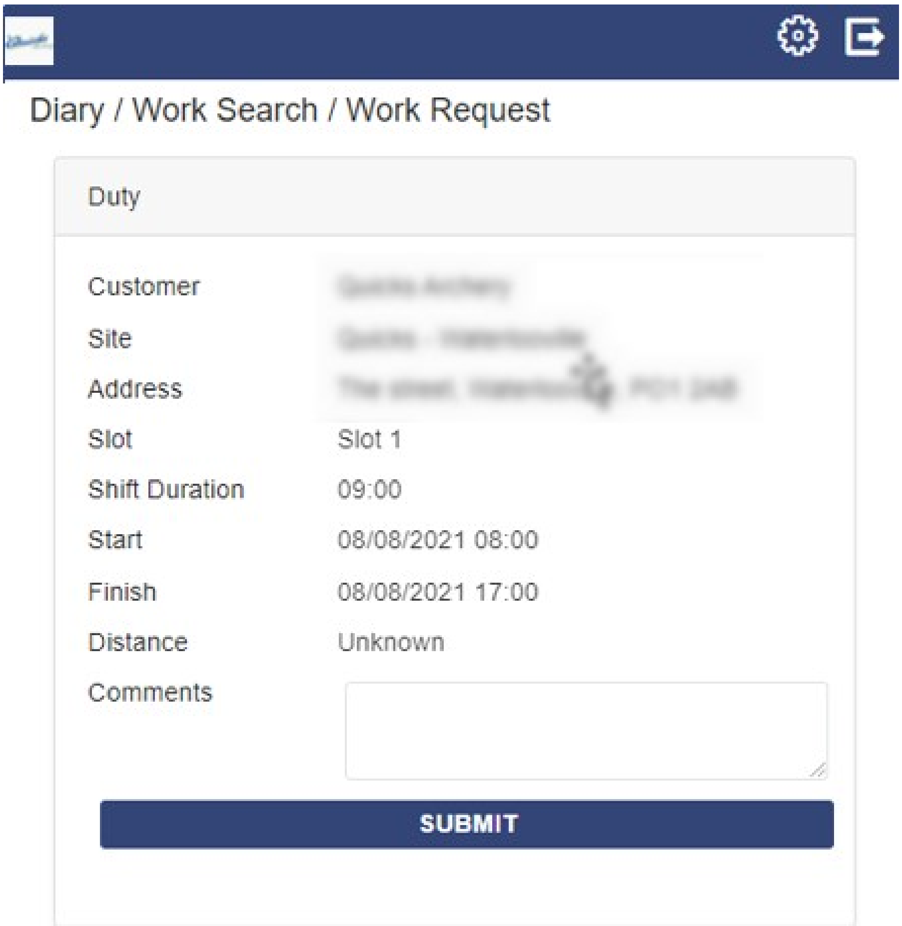
To undertake a search for work:

- Select a **Start Date** (and time) and a **Finish Date** (and time).
- Select the **Distance** you are willing to travel
- Select **Submit**.

Any available duties are shown:



For those items that you wish to apply for, select **Request**. You will then be presented with the details of the duty:



If required, add any **Comments** before accepting the request.

Select **Submit** to be considered for the duty.

If your requested duty is part of another employee **Giving Away** their shift, you will receive messages in the Employee Portal throughout the process. You will receive messages titled Duty Pick Up. If successful, and approval has been completed, you will receive a message and see that your duty has changed in the diary.

ACTIONING HELP DESK TASKS IN THE TASK MANAGER/MONITOR

How do I view any outstanding tasks or requests from employees?

You are able to view any outstanding tasks or requests from employees that have been created in the Employee Portal from the **Manage | Tasks** or **Monitor | Tasks** screen (they're both links to the same place). The task management/monitoring screen comprises four pieces of functionality These are:

- **Search Criteria**
- **Add a new task**
- **Task List Grid**
- **Configure Grid**

These are shown below:

From the **Search Criteria** part of the screen, the user can search for specific tasks using a series of criterion and filters. This works much in the same way that incidents and duties are searched and filtered. results are shown in the **Grid**

When the user initially loads the **Manage | Tasks** or **Monitor | Tasks** page, the filters are pre-set to show all task types for the last year that are flagged with a status of **Started** or **In Progress**, for **Both** i.e. **Employee** and **Sites**.

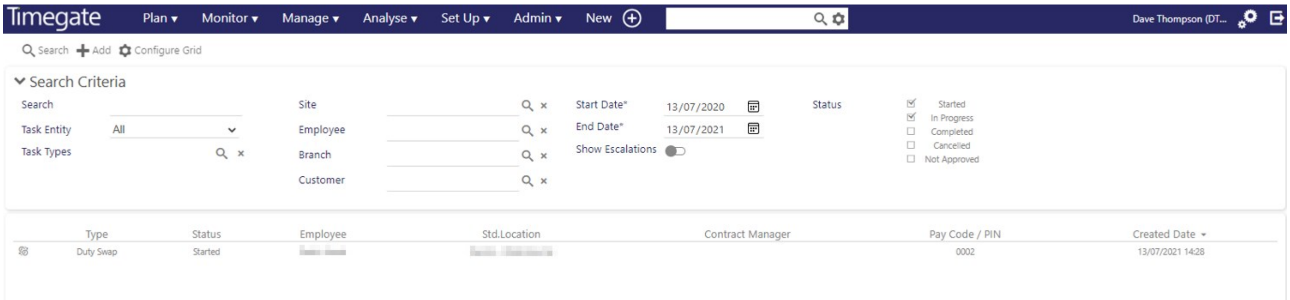
The **Start Date** and **End Date** search option can be used to narrow the list of tasks displayed based on their creation date.

How do I manage duty swaps in the Task Monitor?

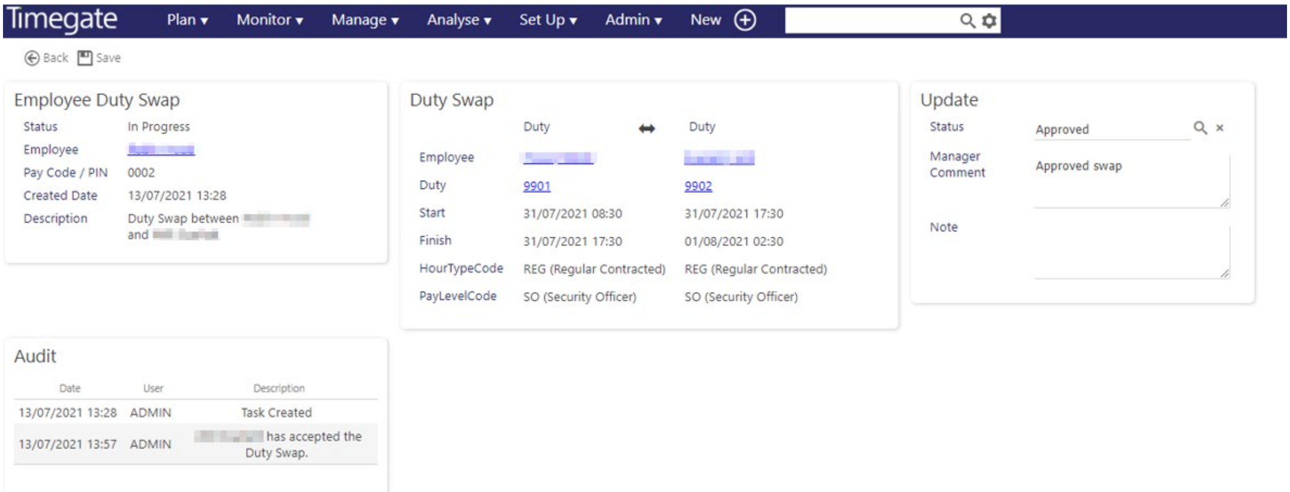
Approving Duty Swaps

Duty Swaps are approved in the **Task Monitor/Manager**.

Open **Monitor | Tasks**:



Select the **Duty Swap** task:

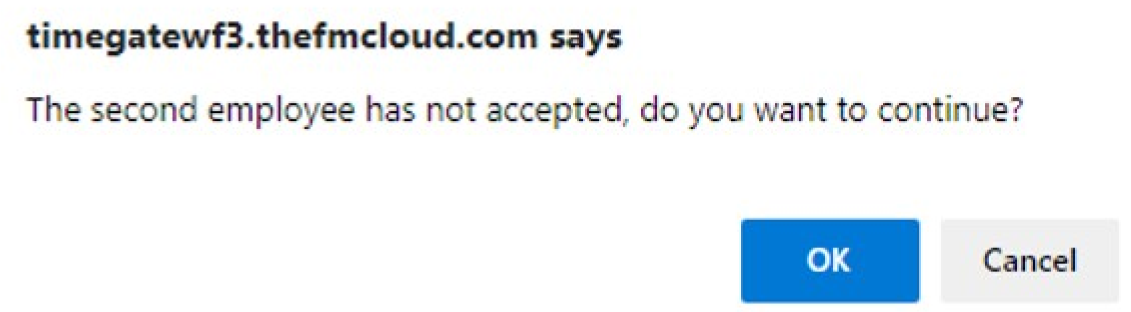


From the **Employee Duty Swap** screen you can see the full details of the duty swap. You can choose to change the status to **Approved** or **Rejected** and complete a manager's comment in the **Manager Comment** field. Employees will see this in their Employee Portal. Once completed, select **Save**.

> **Please Note:** It is possible to approve reject the request, prior to the other employee giving their approval

Approving/Rejecting a request prior to other employee approval

If you attempt to approve/reject a request prior to the other employee approving the duty swap, you will see this prompt:



Select **OK**

You will then be presented with a pop-up box to confirm the swapped duties:

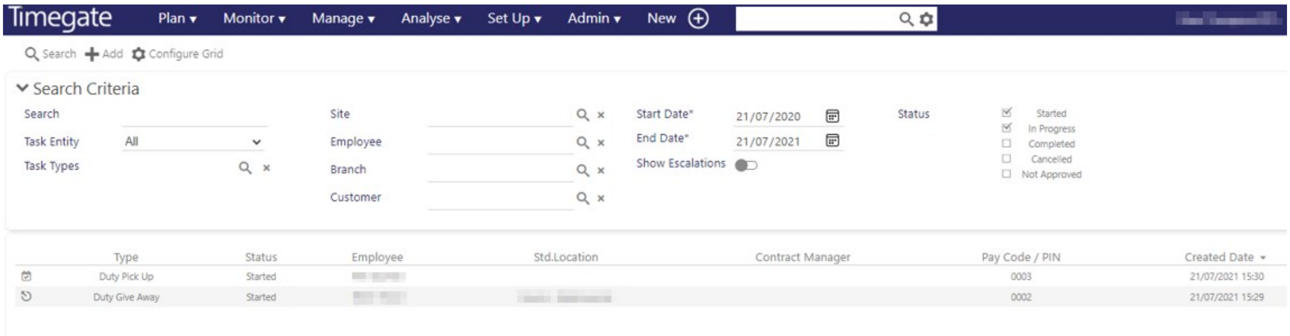
Complete your **Comments** and then select **Swap Employees**

The duties will be swapped on the Site plan and in the Employee Portal. The system will automatically complete a Rate Generation Job to update the swapped duties.

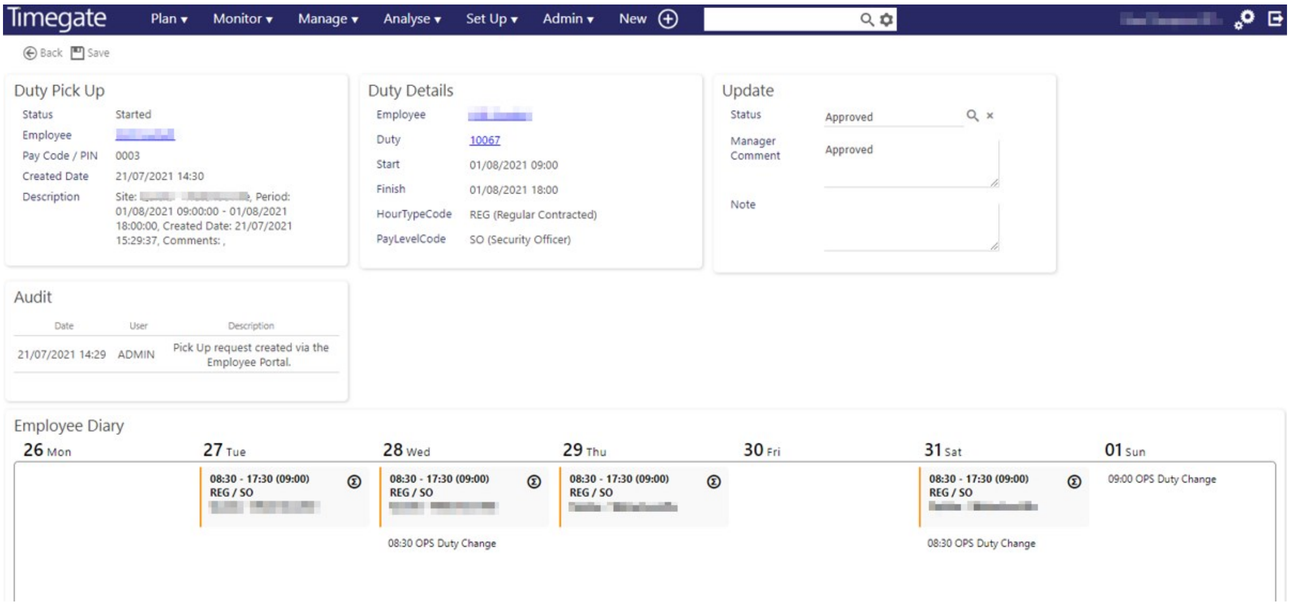
How do I approve or reject Duty Give Aways and Pick Ups as a manager?

Duty Give Aways and Duty Pick Ups are approved or rejected using the **Task Monitor/Manager**.

Open **Monitor | Tasks**:

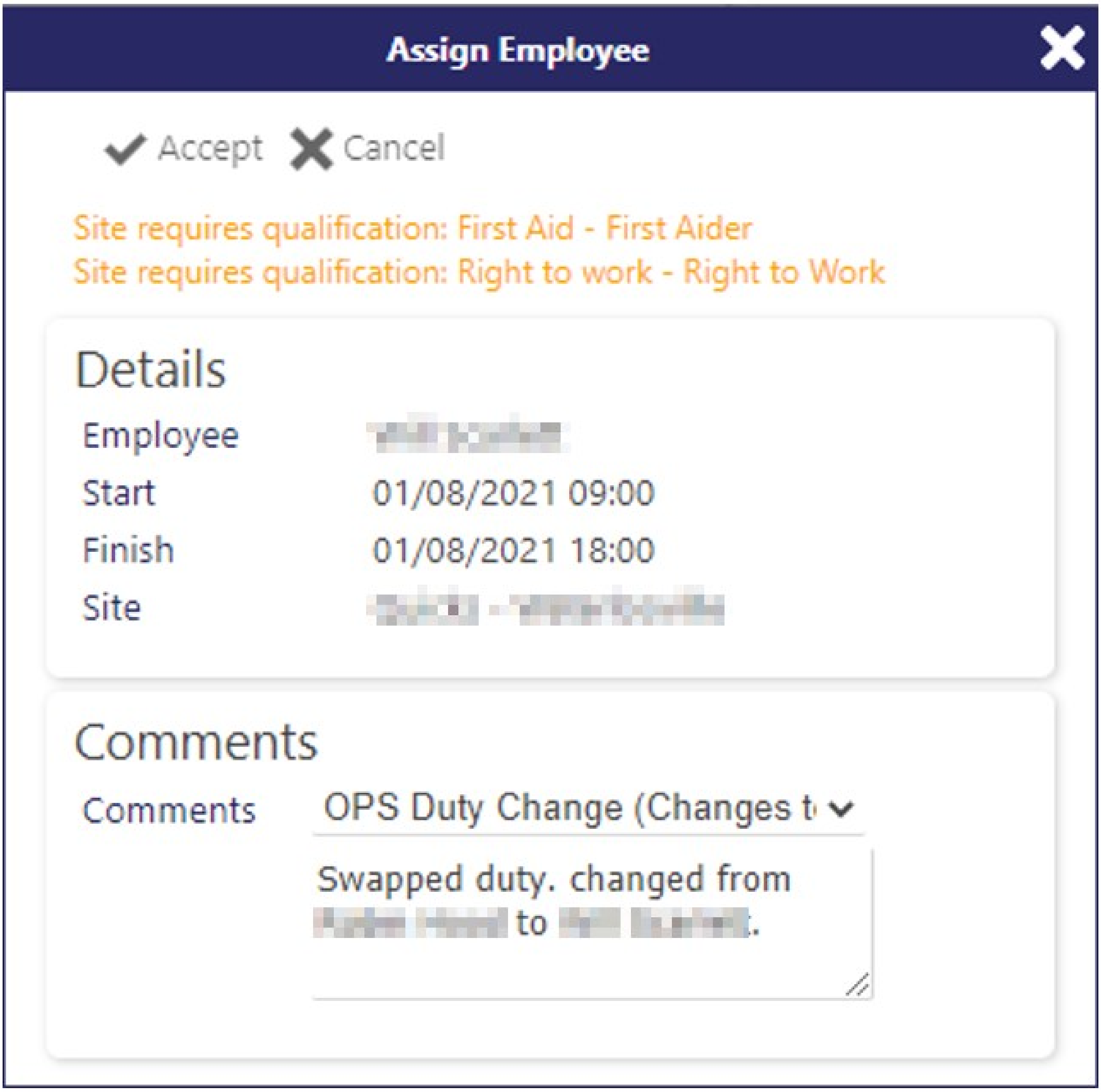


Select the **Duty Pick Up** or **Duty Give Away** task:



From the **Duty Pick Up** screen you can see the full details of the employee asking to **Pick Up** the duty. Their Diary along with the Duty Details are visible and you are able to access the duty. You can choose to change the status to **Approved** or **Rejected** and complete a manager's comment in the **Manager Comment** field. Employees will see this in their Employee Portal. Once completed, select **Save**.

The following pop-up loads after selecting **Save**:



Select **Accept** to approve.

The duties will swap on the Site plan and within each employee's Employee Portal. Both employees will receive a message on the Employee Portal and an email confirming the changes. The system will automatically complete a Rate Generation Job to update the changed duties.

How do I search for tasks?

From the **Search Criteria** part of the **Manage | Tasks** or **Monitor | Tasks** screen:

1. Select your search criteria using the different filters as necessary:
   - **Task Entity** - Select Site task, an Employee task, or Both to search for
   - **Task Type** - Select a task type using
   - **Site** - Search for a specific Site using
   - **Employee** - Search for a specific Employee using
   - **Branch** - Search for a specific Branch using
   - **Customer** - Search for a specific Customer using
   - **Start Date** - Select the search start date (Date From) in the DD/MM/YYYY format or select a date from the drop-down list
   - **End Date** - Select the search end date (Date To) in the DD/MM/YYYY format or select a date from the drop-down list
   - **Status** - Select from either Started, In Progress, Completed, Cancelled and Not Approved. This value is Task Type sensitive and it will change based on the Task Type selected
2. Select **Search**. The results will be displayed in the **Task List**

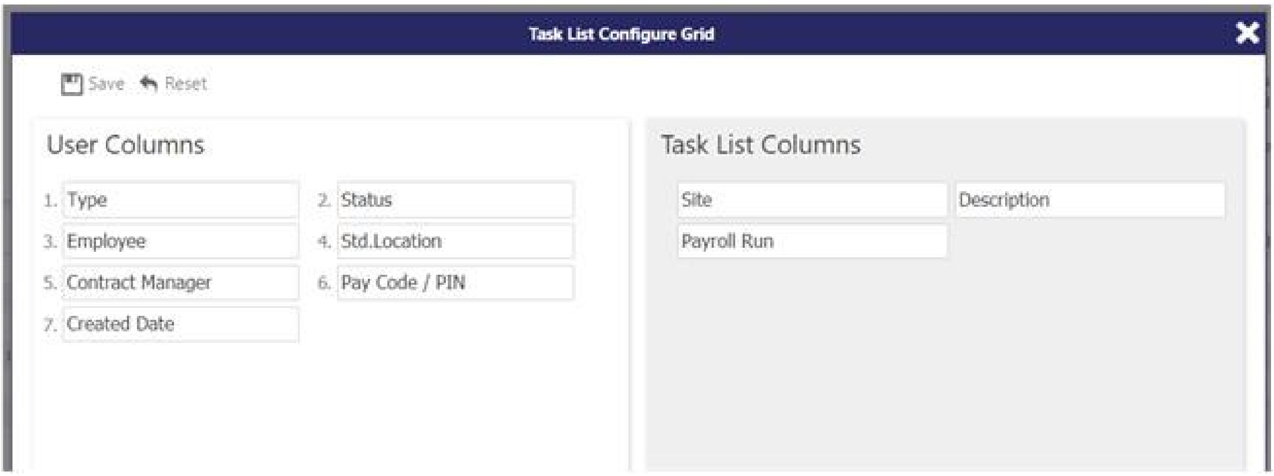
How do I create a task on behalf of an employee?

From the **Manage | Tasks** or **Monitor | Tasks** screen:

- Select **Add**
- Select the **Task Type** you wish to add
- Select **Employee**
- Select **Create Task**
- Enter details for the task (these will differ from task type to task type)
- Select **Create Task** (which will close the dialog box)

How do I configure the grid?

Select **Configure Grid** from the menu to open the **Configure Grid** page. The following will be opened:



The left-hand side of the screen, entitled **User Columns** shows those columns that will be displayed on screen in the help desk task grid. Items on this side of the screen can be dragged using the left-hand mouse button onto the **Task List Columns** side of the screen to remove them from the help desk task grid view. At least one column must be included in this side of the screen. The number next to each column shown above is representative of the order of the columns in the grid - for example, **1. Type** will be shown first, where as **7. Create Date** will be the last column shown.

The right-hand side of the screen, entitled **Task List Columns** shows those columns that will not be displayed on screen in the help desk task grid. Items in this list can be dragged using the left-hand mouse button onto the User Columns side of the screen to be made visible.

To save changes, select **Save**.

Select **Reset** to reset the values in each column to their default settings (as shown above)