Tasks Management Business Object

It is frequently useful to be able to manage lists of regular tasks in an organisation to avoid critical actions being missed.

Orixa includes a simple "Tasks" Business Object which includes some simple-but-useful mechanisms for this type of work.

Note that the Tasks Business Object can be extended by your own developer beyond the basic features outlined here.

The Tasks Business Object contains some special programming which allows each Task to appear in an App's Daily Activity Worksurface on the day or days it is due to be done. For example a Weekly task with DayOfWeek = Wednesday will appear each Wednesday. A Monthly Task with a WeekNum =2 will appear in the Worksurface for each day of the second week of a month.

Tasks can be linked to Work-Items. Once a staff member has completed filling in the data for a Work-Item, the task will appear "complete" in their Worksurface, giving a clear indication of work-progress.

Tasks Edit Form

Tasks Edit Form

The Tasks Edit Form is identical in most features to all other Orixa edit forms. It includes Name (1) and Description (2) fields which can be used to describe the work to be done. It also has the capability to be linked to Comments, FileNotes and Images (3), so if the task is complex or requires referencing specific procedures or other documents during it's execution these can be linked into the Task for ease of access.

Managing Tasks: Links to Contracts and Frequency

Tasks linked to Contract and ContractItem

Tasks can be recorded in this data-table, linked to a staff member, Contract and ContractItem (1). This allows the work done on a Task to be allocated to a specific budget.
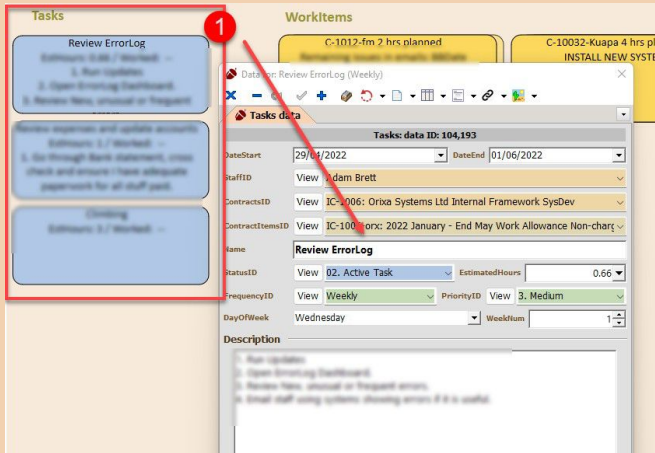

Frequency of Tasks

The key extension which has been added to the Tasks Business Object to give it some special features are the fields which relate to Frequency.

FrequencyID: Can be set to Once, Daily, Weekly, Monthly or Annual. Setting the frequency in combination with the **DateStart** and **DateEnd** determines the duration for which the Task appears in the Daily Activity Worksurface.

DayOfWeek: For Weekly tasks, pick a day on which you want the staff member to perform the task.

WeekNum: For Monthly tasks, pick a week-of-the-month (from 1 to 4) during which you expect the staff member to perform the task.

Managing Tasks in the Daily-Activity Worksurface

Tasks in the Daily Activity Worksurface

Click on any task displayed in the Daily Activity Worksurface to open it to view and review (1).

Tasks will appear depending on their Frequency, DayOfWeek and WeekNum settings.

If no WorkItem is associated with the Task for the period in-view, the Task will appear with it's Status-colour. If a WorkItem is associated with the Task it will appear with the WorkItem's status-colour. This makes it easy to assess whether or not a Task has been completed.
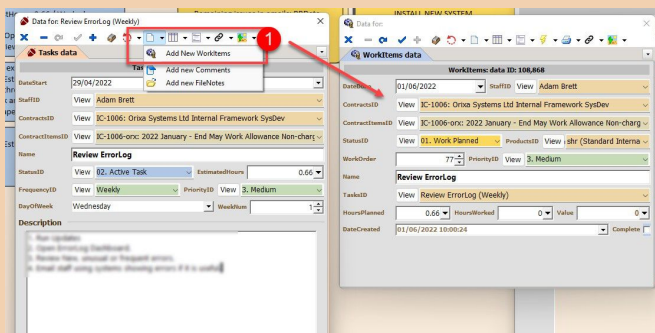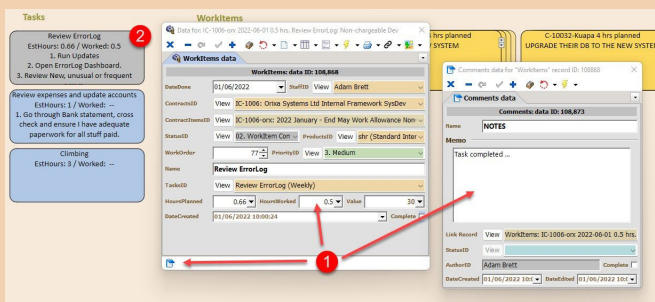

Adding a WorkItem to a task

To add a Work-Item indicating that the task has been done, click on the "new child" tool-button, and select "Add New WorkItem".

Note that the added Work-Item will automatically be populated with data from the Task:

1. Name

2. ContractsID

3. ContractItemsID

4. HoursPlanned

Completing a Task, Worksurface updates to show completion

The staff member can then complete the task, and add details of the work-done, in the Work-Items record, including linked Comments, Files, HoursWorked etc.

1. Details added

2. Once a Task has a Work-item linked to it **for the current period** it will appear "completed" (grey) on the worksurface.

As the Work-Item has a ContractsID, ContractItemsID and TasksID, it is quite easy to report on frequency of tasks completion and associate these to Contracts for Billing.