What We Will Cover

- What are Tasks?

- When to use Task Manager vs WorkNow (QLE)

- Task Manager Functionality

- Clipboard List and Processing Options

- Security Level Settings and Best Practices

What Are Tasks?

- Task codes (Tasks) in QL/QLE are like Diary or Activity codes

- Tasks can be used for several key elements in QL/QLE workflows
  - Batch processing document packages
    - TAS Documents or Job Scheduler
  - Flag accounts for an export process
  - Assign work to a designated resource on a specified date
    - AMR (QLE) – Attorney Meaningful Review of document package
    - WorkNow (QLE) – Best method to work Task lists in QLE
    - Task Manager (QL/QLE) – Best method to work Task lists in QL, some QLE functionality

When to use Task Manager vs WorkNow (QLE)

- WorkNow is recommended over Task Manager in QLE

  - More direct guidance for end users

  - Increased flexibility delegating work

  - Improved automation opportunities in workflow

  - Enhanced productivity reporting

Task Manager Functionality

- Best method of working Task lists in QL

- Additional functionality (QL/QLE)
    - Post batch payments
    - Post cost checks batch
    - Divide Tasks and Change Owner

Clipboard List and Processing Options

- Clipboard List
  - On-demand work list
  - Can match ourfile, custfile, forwfile, ncustfile, and preourfile account numbers or SSN
- Build Custom List
- Processing Options
  - Add Tasks, notes, Pcodes, Special Templates, and more
  - Change history log

Security Level Settings and Best Practices

- Security Level Settings
  - SELECASE – TASKMANAGE: Task Manager button
  - TASKMANAGE Security Level Group
- Clipboard List/Build Custom List access should be carefully considered
- Report No Tasks
  - Every open account should have an active Task

Questions & Answers

Please propose your questions in the Zoom chat **to everyone** and they will be answered during Q & A.

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