

# BlueCamroo

## User Guide v. 4.0



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## 6. Managing Tasks

### 6.1 “Accountability Management”


Many project management and collaboration systems incorporate some form of Task Management. Frequently, this involves creating a Task for other users, and using the system to notify the assigned user that they have a task to complete by a certain date and time.


This is a good process, but it has one important flaw – when you've assigned a task to another user, **how can you be sure they are actually got the notification and are going to do what you've asked?**

BlueCamroo goes beyond the basics of Task Management and implements a scheme of **Accountability Management**, by requiring the assigned user to **Accept** or **Reject** each assigned task. This closes the communication loop, so that rather than leaving you uncertain your request has been received and will be actioned, BlueCamroo lets you see that whomever you assigned your task to has received the task notification; and has **Accepted** it, confirming that he or she is taking **Accountability** to complete the task.

### 6.2 Creating and Assigning Tasks



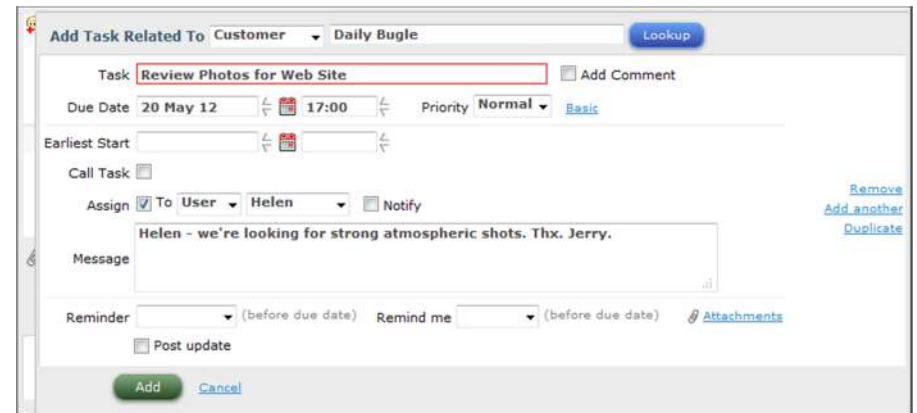
To create a Task from anywhere in BlueCamroo, drop down the Quick Action  button and pick 'Add Task'.

Alternatively, when working with any BlueCamroo data, hover over 'Tasks' in the Explorer Bar and click the Add  button to add tasks related to that particular data.

You can assign the task to yourself, or to any **one** other person (because only one person can be accountable for delivery of a task). The exception to this is if you (or your System Administrator) have defined **Task Groups**, in which case you will be able to assign the Task to a group of colleagues, any one of whom may accept responsibility for delivery. (See Section 6.6 below for more information about Group Tasks.)

Here are some tips for creating and assigning Tasks:

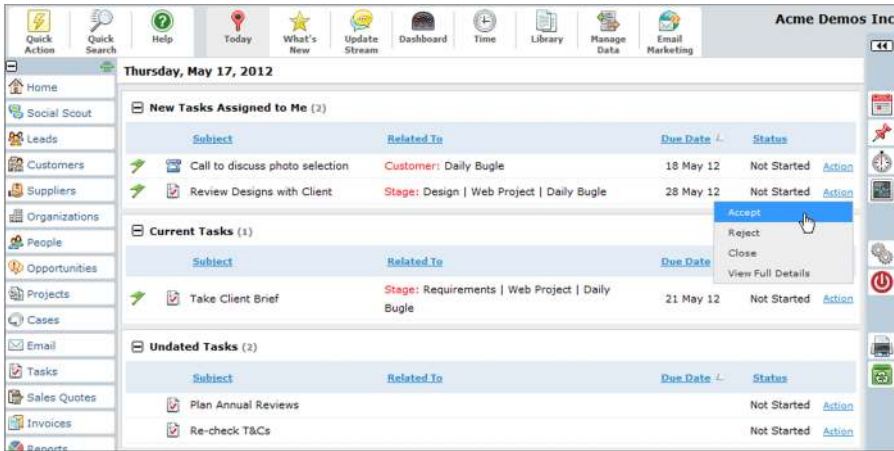
- If the Task you are assigning is to make a call, select the 'Call' task type to access additional data.
- The Task will automatically appear in the Assignee's **New Tasks Assigned to Me** list. Check the 'Notify' box to also notify them by Email.
- Due Date is the date by which the Task should be completed. You'll probably complete this for most tasks.
- Earliest Start Date is the date before which no work should be done on the task. This is normally left blank, but you might use it if, for example, the task is to make a follow-up call and you don't want that done too soon.

A screenshot of the 'Add Task' form in BlueCamroo. The form is titled 'Add Task Related To Customer Daily Bugle'. The task name is 'Review Photos for Web Site'. The due date is '20 May 12' at '17:00'. The priority is 'Normal'. The assignee is 'Helen'. The message is 'Helen - we're looking for strong atmospheric shots. Thx. Jerry.'. There are buttons for 'Add' and 'Cancel' at the bottom.

### 6.3 Accepting (or Rejecting) Assigned Tasks

Every time you log in to BlueCamroo, new Task Assignments (tasks other people have assigned to you) are right there on your Home page.

It is a good idea to make a practice of logging in to BlueCamroo at least once a day to check the status of your tasks. For every newly assigned task, the system requires you to either **Accept** or **Reject** the task. Simply mouse-over the **Action** link to activate the drop-down menu, and select the appropriate action.



## 6.5 Working with Tasks

Most BlueCamroo users quickly find they're managing a lot of their day-to-day work by creating and working with Tasks, so it's worth taking a moment to run through the options available to you to work with Tasks. Depending upon the context, the **Action** link will present a number of options, including:


<b>Accept and Reject</b>	To Accept or Reject tasks assigned to you by another user.
<b>Add Progress</b>	Record some progress on a task (and optionally record time spent to your BlueCamroo Time Sheet) short of completing it.
<b>Log a Call</b>	Special action for <b>Call</b> type tasks. Launches a dedicated screen for making / logging calls.
<b>Close</b>	Record completion of the task (and optionally record time spent to your BlueCamroo Time Sheet).
<b>Cancel</b>	Cancel the task (without completing it)
<b>Reschedule</b>	Change the due date on the task. All changes are recorded to Task History and – for tasks assigned by another user – are notified back to the assignor.
<b>Re-Assign</b>	Give the task to someone else. Note this uses the same process as assigning a new task to another user; they will be asked to Accept or Reject the task, and re-assignment is only completed if they Accept. (If the task was assigned to you by another user, you will still show as the accountable user until the person you are trying to re-assign to accepts.)
<b>Add Timer</b>	Starts a Timer (see Section 12.4) associated to this task.

As the screenshot above shows, there are also two further options: to **Close** (i.e. complete) the task, or **View Full Details**. The **Close** option lets you complete a task right then and there without needing to go through the step of Accepting it; this can be particularly helpful if you're just updating BlueCamroo with tasks you've already completed, for example because you did them as soon as you got the notification email.

**Note:** System Administrators will see additional Actions available.

## 6.4 Viewing Tasks

OK. So you've Assigned a Task to me, and I've Accepted it. How are you going to know?

Click the  **Tasks** button in the Explorer Bar. BlueCamroo will now display four options:

1. **My Tasks:** Open Tasks I have created for myself, or Accepted from other users
2. **Tasks I have assigned:** Open Tasks I've created for other users
3. **New Tasks assigned to me:** New Tasks from other users
4. **Group Tasks:** Tasks for Groups that I am a member of (see Section 6.6)

By selecting **Tasks I have assigned**, you can see all open tasks that you have assigned to other users, and whether or not they are Accepted.

## 6.6 Group Tasks

A basic principle in BlueCamroo is that only **one** person can be accountable for completion of each task. However, it's not unusual in organizations to find people working in Groups that share tasks amongst themselves. BlueCamroo addresses this with **Group Tasks**.

**Note:** Group Tasks can only be used where your System Administrator has set up at least one **Task Group**. Instructions for the System Administrator are below.

Let's assume for a moment that Peter, Sarah and George are members of the **Sales Support Group**, and that you are a Sales Manager who needs to have a quotation sent out. Now you could choose and assign a Task to Peter, or to Sarah, or to George individually to issue the sales quotation, but perhaps in reality you don't mind which person issues the quotation so long as it gets sent. In this case, you can create your Task in the normal way and assign it to the Sales Support Group.

### How are Group Tasks Different for the Assignee?

Group Tasks are handled pretty much like regular Tasks, with these exceptions:

- A new Group Task appears in *every* Group member's **New Tasks Assigned to Me** list.
- When a member of the Group accepts the Task, they become the accountable person to complete it, and it moves into their individual **My Tasks** list. At the same time, the Task now *disappears* from every other Group member's New Task Assignments list.
- All Group members can see all Open tasks that have been accepted by any member of the Group by going to the **Tasks** page and selecting the **Group Tasks** view.
- All Group members can **Add Progress** to, or **Close** any Group Task, even if it has been Accepted by a different member.

### How are Group Tasks Different for the Assignor?

For the person who creates and assigns a Group Task, there's really very little difference. You can still view the Task in the normal way in the **Tasks I have assigned** view on the Tasks page, and BlueCamroo will still tell you if it has been

accepted or not. The only difference is that BlueCamroo will also tell you which member of the Group accepted the Task.

### For Administrators: Creating Task Groups

If you are the System Administrator, follow these steps to configure Task Groups: Click **Setup** | **Users and Groups** | **User Groups**; add a new User Group (or edit an existing one), and check the 'Task Group' checkbox to indicate this Group should be used for Group Tasks.

## 6.7 To Dos

So, to recap, you can create BlueCamroo Tasks for yourself and co-workers. You can Assign; Schedule; Re-assign; Re-schedule; Add Progress; and Launch Timers.

*"What's that? You just wanted to remember to buy some milk and pick up your dry-cleaning at lunchtime?"*

We all have lists of stuff we need to do that doesn't warrant creating a full-on Task in BlueCamroo. And for those, BlueCamroo offers **To Do lists**.

To Do Lists are created in the **To Dos** right-hand side panel.

### 3 Ways that To Dos are not the same as Tasks:

1. To Dos cannot be assigned to anyone else.
2. To Dos are 'done' or 'not done'. You can't add progress to a To Do.
3. To Dos are personal. Other system users (including the System Admin) don't see your To Dos, and they also don't create History.

### 2 Ways that To Dos are a bit like Tasks:

1. To Dos can have due dates.
2. To Dos can be related to other data.

