



## **TaskAide Client**

<http://www.laservault.com>

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# Introduction

TaskAide is a software package offered by LaserVault for use with our LaserVault Imaging system. LVI must be installed for TaskAide to function. TaskAide expands the functionality of the LVI system by allowing you to route your documents through a business process in a digital format. There are many benefits to using TaskAide, most notably, the ability to track documents as they are worked through the business process. TaskAide can also allow you to examine and improve the efficiency of your business processes.

The TaskAide system is driven by workflows. In TaskAide, a workflow is made up of a series of tasks linked by transitions. Tasks can be scripted or manual. Manual tasks can include both data input fields and decision options. A scripted task uses VBScript to evaluate data and determine which task to move to next.

Each workflow and task allows the ability to send email notifications when various events occur. This allows you to notify either the assigned user that there is new work to be completed, or any other user or role that you wish to send a notification at any part of the workflow.

This help file will help you to the TaskAide Client.

## Accessing the TaskAide Client

Accessing the TaskAide Client can be accomplished by requesting the TaskAide URL in your Internet Explorer browser: Such as [http://\[servername\]/taskaide/taskaide.asp](http://[servername]/taskaide/taskaide.asp). See your administrator for assistance with this if needed.

Before the TaskAide Client loads, a small version-checking, ActiveX control will need to load and check the version of the TaskAide Client files on your pc. In order for the version checker to load, you must either add your TaskAide site as a "trusted site" in your browser configuration, or allow the operation of ActiveX controls in your browser configuration. If you are unsure of the proper configuration, in regards to security, feel free to contact our Technical Support department for the best solution, as these settings are dependant on your internet connectivity and general situation.

Once the TaskAide Client has loaded, you will be presented with a login prompt.

Enter the username and password that was provided to you by your TaskAide administrator.

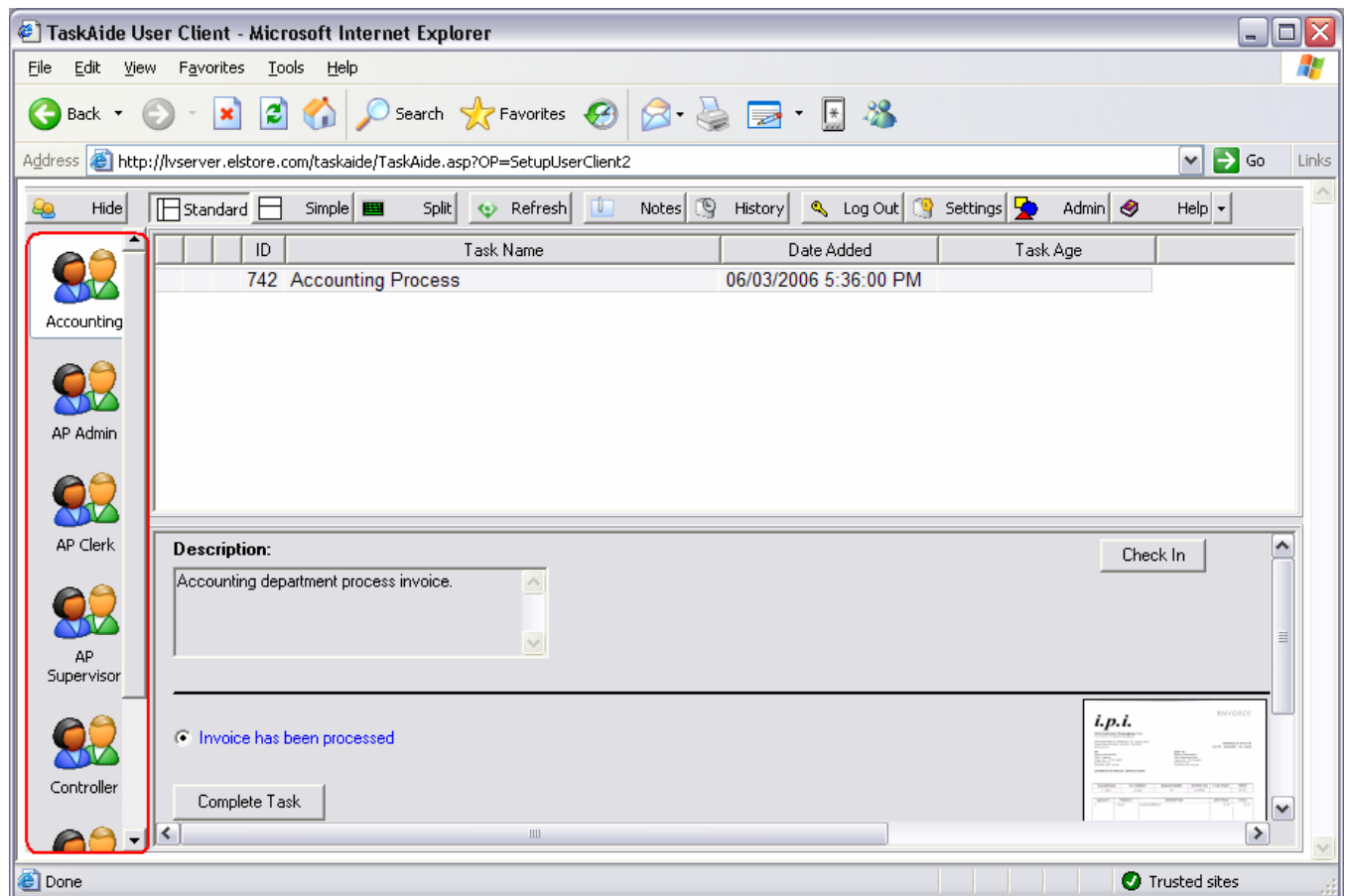
# Client Controls

Upon logging in, you will see the TaskAide Client main screen. This screen is comprised of a few keys controls that allow you to navigate through your available tasks.

## Roles List

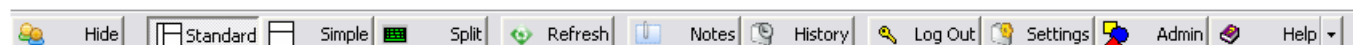
A role is simply a grouping of users and can be considered a representation of a job function in your organization. The detail to which the roles are narrowed is decided by your TaskAide administrator during the configuration of the TaskAide system. Roles might include AP Clerk, Controller, Department Manager etc.

You will have a menu on the far left of the TaskAide Client that lists a button for each role of which you are a member. Selecting a role will load all current tasks for that role. If there are no tasks available at that time for that role, you will see a message displaying end of task list. There is a button at the top of the roles list that allows you to hide or show the list.



## Toolbar

The toolbar above the task list gives easy access to some common functions in the TaskAide Client.



- *Standard View* – Task list on top with task information on bottom
- *Simple View* – Task information on top with attachment on bottom
- *Split Screen View* – Same as simple view, but splits the screen with another application such as a 5250 emulation screen.
- *Refresh Task List* – Retrieves the task list from the server
- *Show Flow Notes* – Displays any notes that have been added to the selected flow
- *Show Flow History* – Displays the logged history of the selected flow
- *Logout* – Logs you out of the TaskAide Client
- *Admin* – Launches the Administration Console, if you are logged in as an administrator
- *Help* – Displays this help file

### **Task List**

This list is visible in the Standard view and shows the available tasks with some information about each task. The tasks can be grouped by any combination of the columns visible in the list through settings available in the Options screen.

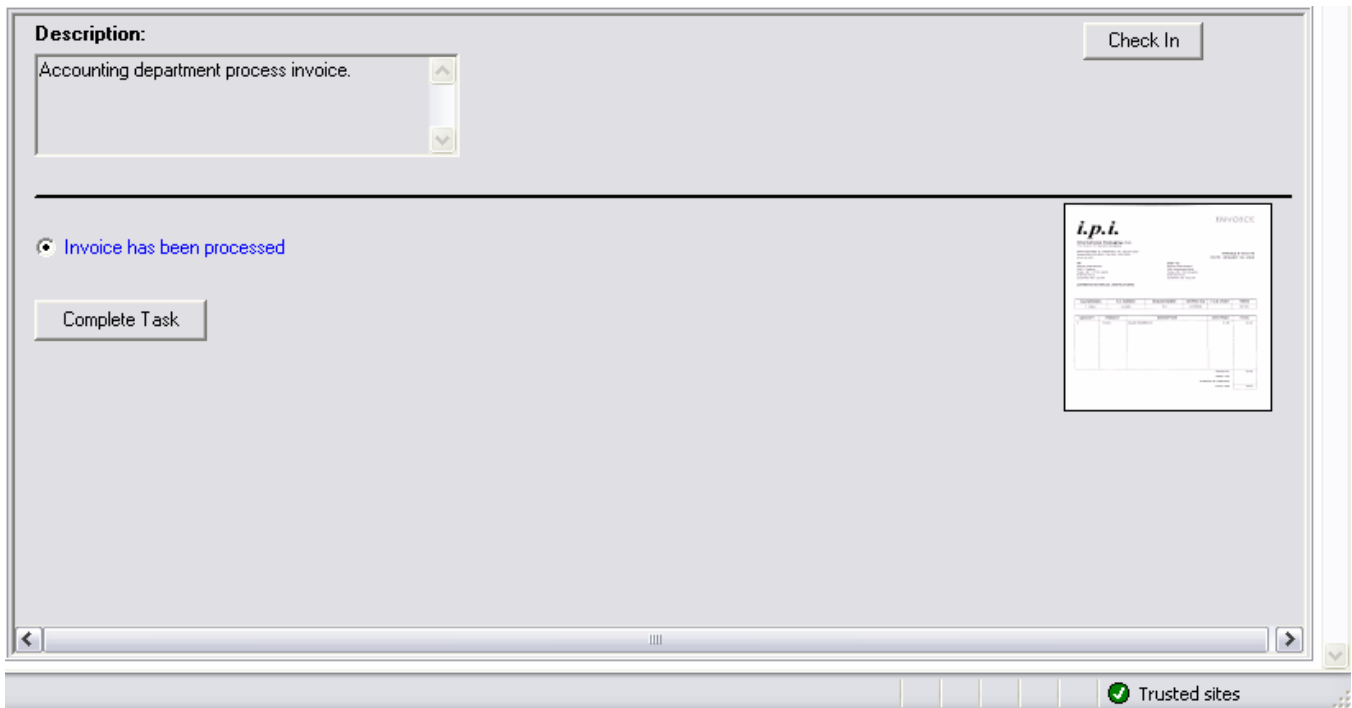
### **Task Information**

The task information frame displays any available information about the task, as well as any fields, routing options, or a combination of both that have been configured by the TaskAide administrator to display.

You will notice that any required input fields are displayed in red text, and if options are available then you are required to select one before completing the task.

This frame will also show a thumbnail of the imaging attachment, if possible, or a generic thumbnail denoting the attachment. You can view this attachment by double-clicking the thumbnail. This will launch the local viewer for the attached file.

You will also notice a Check In/Check Out button above the attachment thumbnail. TaskAide handles task responsibility based on a “lock out” method. If the TaskAide administrator has configured the task to be assigned to a user automatically, then the task is assigned to the user by the TaskAide system. At that point, the task is “locked” by that user until the task is either checked back in by the user or the configured task expiration date is surpassed. It is also possible for the TaskAide administrator to configure a task to not be assigned to a user automatically, but to be visible to any user with access to that task. These tasks will show up in your task list, but will not be assigned to you. In order to complete the task, you must check the task out and lock it to you by pressing the “Check Out” button. This system avoids duplicate work being completed by more than one employee.



## Task View Types

The TaskAide Client now allows you to decide between three (3) different view types to choose the view that you like best or that best fits your situation. You can change the view at any time by selecting a different view option from the toolbar.

- **Standard View**  
This view features a list of available tasks above the task details.
- **Simple View**  
This view shows the task details above a view of the flow attachment.
- **Split Screen View**  
This view is similar to the Simple view, while splitting the screen area with another application to allow for data entry.

### Standard View:

TaskAide User Client - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail New Tab

Address http://lvserver.elstore.com/taskaide/TaskAide.asp?OP=SetupUserClient2 Go Links

Hide Standard Simple Split Refresh Notes History Log Out Settings Admin Help

ID	Task Name	Date Added	Task Age
742	Accounting Process	06/03/2006 5:36:00 PM	

Accounting

AP Admin

AP Clerk

AP Supervisor

Controller

HR Manage

**Description:**

Accounting department process invoice.

Check In

Invoice has been processed

Complete Task

*i.p.i.*

Done Trusted sites



### Split Screen View:

The screenshot displays a split-screen view of a computer interface. The left window is titled "TaskAide Client - Microsoft Internet Explorer" and shows a web-based application. The right window is titled "Session A - [24 x 80]" and shows a terminal interface.

**TaskAide Client - Microsoft Internet Explorer**

Standard Simple Split Refresh Notes History Logout

Sales Person: A Aird  
Company Name: Electronic Storage Corporation  
Contact: Brad Jerom  
Priority: 6050d

Complete Task  
New Task

This call requires no comments  
 This call requires comments: sent back to the Salesperson

Comments:

45% Page 1

**Rotella's ITALIAN BAKERY, INC**  
3000 Justin Drive, Suite D, URBAN DALE, IA :  
(515) 278-4120 Fax (515) 278-2766

CUSTOMER NAME AND ADDRESS  
MARRIOTT WEST DES MOINES  
1250 JORDAN CREEK PKWY

RTE	ACCT	STOP
387	3178	0020

CUS

DELIVERED				AMOUNT	SOUR I
PROD	UNITS	UNIT PRICE	AMOUNT		
161		4	1.59	6.36	

Done Trusted sites

16 a 86/853

1902 - Session successfully started

**Session A - [24 x 80]**

File Edit View Communication Actions Window Help

Sign On

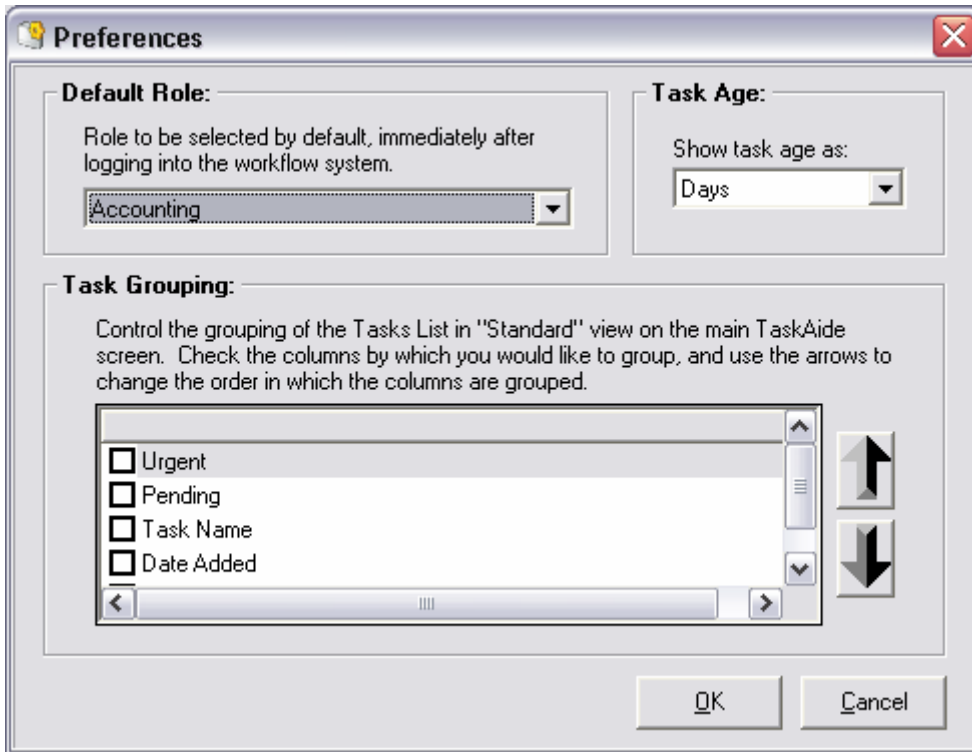
System . . . . . : ST02LWVM  
Subsystem . . . . . : 003GE  
Display . . . . . : 0040EY0002

User . . . . . : \_\_\_\_\_  
Password . . . . . : \_\_\_\_\_  
Program/procedure . . . . . : \_\_\_\_\_  
Menu . . . . . : \_\_\_\_\_  
Current Library . . . . . : \_\_\_\_\_

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# Client Settings

By clicking on Settings button at the top of the role list to the left of the Client, you can access the Options screen.



## Default Role

This is the role that will be automatically loaded when you log into the TaskAide Client.

## Task Age

This specifies what time frame is used to represent the Task Age field.

## Task Grouping

Using this list, you can group the tasks together by one or more column values in the task list. Simply check the box next to the fields that you would like to use to group the tasks in the task list.

# Flow Notes

By selecting a task and clicking the Flow Notes button in the toolbar, you can access the notes that have been added to this flow instance. From the Notes screen, you have the ability to view other notes and add your own. These notes will stay associated with this flow record throughout the duration of the flow process or until they are manually deleted.

