



## Task Performance Dashboard

This document will provide you with a more detailed understanding of the dashboards and the required information for an accurate population of information on the dashboards. Each dashboard panel has an information icon, this is provided on each panel with a description of what is included on the displayed panel. Additional icons will be provided to the user on select dashboards, hover over the icon to display the definition the icon function. Click on the icons to perform the action or function. **\*\*Employee Permissions will apply with the function/action of icons such as Print and Export. The Administrator manages these permissions within the Employee information in your database. Employee Permissions are located at Settings→ System Setup→ Employee, Permissions.**

### Task Performance

This dashboard shows how Tasks are being performed and can be filtered on Employee, Office and Company for a given date range.

Task Name	Total Tasks	Total Open	Total Tasks Overdue	% On Time	% Of Tasks	Avg Days to Complete	Avg Days Overdue
Accounting Letter	21	0	0	0	4.22	110	0
Approval of Invoices	3	1	2	50	0.6	8	183
Assign Subs/Techs in RM	0	0	1	0	0	0	369
Auth/Contract Status Check	3	2	2	0	0.6	15	115
Bill for deductible	1	1	1	0	0.2	0	224
Billing	21	0	0	9.52	4.22	140	0
Call Back	1	1	1	0	0.2	0	151
Call Bat Relocator/Exterminator	0	0	1	0	0	0	391
Call Sub	0	0	1	0	0	0	423
Call the Customer	10	0	0	20	2.01	62	0
Chase Payments	3	2	3	100	0.6	1	121
Check	2	0	0	0	0.4	0	0
Clean up floor	0	0	1	0	0	0	192

This dashboard provides the user with a Search Engine to narrow down the Tasks. Input the desired information in the Search fields, not all fields are necessary to provide search results.

Employee field represents all employees included in your database.

**\*\*This dropdown is created and managed by the Administrator. Employees are located at Settings→ System Setup→ Employees**

Office field represents the offices that are included in the users accessibility in their Employee information.

**\*\*This dropdown is created and managed by the Administrator. Employees are located at Settings→ System Setup→ Employees, Offices available in/log into\***



## Task Performance Dashboard

Company field represents the companies that are included in the Office of your database.

Employee:  Office:  Company:

Date Range:

Data Range field provides the user with All Dates, Last 365 Days, Year to Date and Between.

Employee:  Office:  Company:

Date Range:

All Dates  
 All Dates  
 Last 365 Days  
 Year To Date  
 Between

Task Name	Total Tasks	Total Open	Total Tasks Overdue	% On Time	% Of Tasks	Avg Days to Complete	Avg Days Overdue
Follow-up Phone Call	3	3	0	0	60	0	0
Schedule Inspector - Insulation	1	1	1	0	20	0	4
Verify Kitchen Lighting Selection	1	1	1	0	20	0	1

Selecting Date Range Between the user will be provided additional fields to input the date frame for the search.

Date Range:  Date From:  Date To:

Once the search results are completed the user has the option of filtering is provided on selected columns, this provides the user the opportunity to narrow the results further.

Employee:  Office:  Company:

Date Range:

Task Name	Total Tasks	Total Open	Total Tasks Overdue	% On Time	% Of Tasks	Avg Days to Complete	Avg Days Overdue
Follow-up Phone Call	3	3	0	0	60	0	0
Schedule Inspector - Insulation	1	1	1	0	20	0	4
Verify Kitchen Lighting Selection	1	1	1	0	20	0	1