

ToDo – A users guide

The ToDo's are used by the other business modules of CompanyControls to automatically raise tasks for individuals or groups. You can also use CompanyControls to raise your own tasks.

ToDo's can be raised for the following people:

- Yourself
- An employee
- A Group
- All employees
- Specific employees
- Specific groups

A ToDo can be raised in Actions > ToDo's > ToDo Menu > Add.

All ToDo's require a Priority, Type, Reason and a short description. Optionally they can also include more Detail, further Notes, a Start and Finish date, the emails turned on or off for this specific ToDo and this ToDo can be set to keep Recurring after a number of days.

ToDo's raised for yourself can be set to private.

ToDo's raised for someone else or a group can be set to require a signoff by the person who raised the ToDo in the first place. Alternatively the signoff can be sent to someone else. The signoff by can be used without the signoff requirement to raise a ToDo on someone else's behalf.

Emails are sent at all stages to ensure the assignee and originator are both fully informed.

When a ToDo is received you will have to accept it before it is officially a ToDo that is assigned to you. In the case of a ToDo that is raised for a group, it can be accepted by anyone in that group or assigned to a group member by the group manager.

Open ToDo's can be viewed by:

- **Assigned to me** – A list of your tasks
- **Outstanding to accept** – A list of tasks assigned to you that have not been accepted yet
- **Outstanding to signoff** – A list of tasks that have been finished and you are to sign them off as complete
- **For my Group(s)** – Tasks that have been assigned to your group
- **Any Applicable to me** – All of the above on one page (also shown on your dashboard)

ToDo's can also be viewed by those that are still open that you have created for others or Groups. They can also be viewed by those that you have created but are now closed.

Administrative access of the ToDo's can be given to a user with the functionality Role of ToDo Admin. This gives that employee access to adjust ToDo settings (Type, Reason & priority) and view ToDo's for all users (except private ones) and all groups.