

## Task Manager

### Product Info

## See All Tasks at a Glance

DocuWare Task Manager speeds up day-to-day office work. With lists and email notifications, no task gets left behind and project move forward on schedule.

There are always going to be projects coming your way, big and small. Whether it's an invoice approval, checking on a case file, or preparing the set of construction drawings for your manager, you need a way to smoothly handle it all so that work doesn't pile up or cause a project to stop. Slowdowns can be costly. DocuWare Task Manager helps you, your department and your company keep on track.

### Benefits

- **Secure:** tasks such as approving invoices do not inadvertently remain unfinished
- **Saves time:** using a task list you no longer need to waste time searching or asking questions
- **Convenient:** you are automatically informed by email when new tasks are pending

# Application

## Twin-Pack: Task List and Email Notification

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With DocuWare Task Manager you can use two DocuWare features, namely the lists and the email notification. DocuWare compiles pending tasks into a list. All you need to do is open DocuWare Client, click on Lists and complete the task which then disappears from your list. In turn, the email notification automatically lets you know when a document has arrived for you. The email also includes a link to the document in question.

## Lists Explained

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Here is an example of how a list makes office work easier: an invoice is received by a company. The mail room scans the invoice into the DocuWare file cabinet. The document is then automatically entered into the task list of the employee responsible. When they open their DocuWare Client they will immediately see the invoice that needs to be approved. The list is updated automatically when a new task is added. This is based on an automatic search with predefined index criteria. For example, if the search dialog contains the term "Incoming invoices" in the "Document type" field and the "Status" field is set to "new", then the employee's list displays all new incoming invoices. If this person approves the invoice with a virtual stamp, the index word changes in the "Status" field. The invoice is automatically removed from this person's list and placed in the list of the person next in the workflow. Payment can be made promptly so the company can benefit if you are taking advantage of early payment discounts

### Know-how: DocuWare Task Manager

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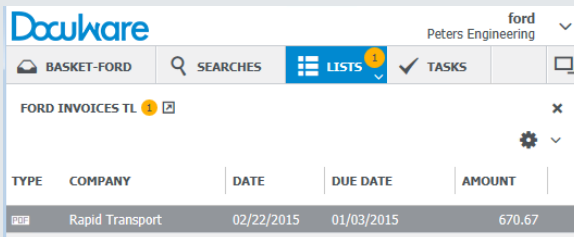
Task Manager is a license that enables two features in DocuWare, namely the DocuWare lists and the email notification. For you to be able to use the email notification feature on your system, the Notification Server must be installed and configured. You also need a configured SMTP connection to transfer data.

## How to Use the Email Notification

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The email notification feature is just as useful as the list: DocuWare automatically sends an email when an event is received for a document stored in the file cabinet or when the index changes. Here is an example to illustrate what this means: The Purchasing department orders office furniture for Administration. As soon as the delivery is received the Purchasing Director automatically receives an email with a link to the archived delivery note, i.e. he is informed that the delivery has been received. He can also open the delivery note in the DocuWare Viewer and compare it with the order before the furniture is distributed around the departments.

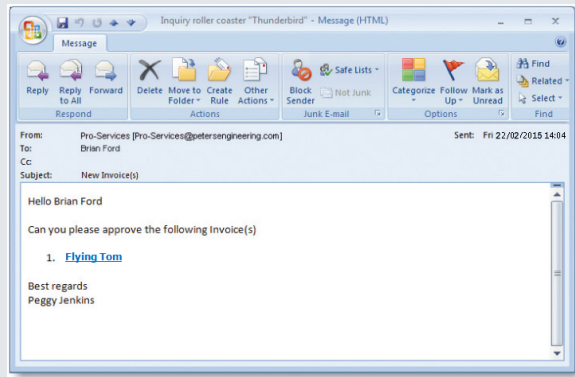
# Work takes care of itself



The screenshot shows the DocuWare interface with a task list titled 'FORD INVOICES TL'. The list has columns for TYPE, COMPANY, DATE, DUE DATE, and AMOUNT. One task is listed: Rapid Transport, dated 02/22/2015, due 01/03/2015, with an amount of 670.67.

TYPE	COMPANY	DATE	DUE DATE	AMOUNT
	Rapid Transport	02/22/2015	01/03/2015	670.67

Transparency: DocuWare Client lists pending tasks



Email Notification lets you know you have an invoice to approve

1 / 1 >>> <<< 6/11 > Rapid Transport

**NAVIGATION**

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**TOOLS**

**DISPLAY**

63%

**STAMPS**

Cost Center A...

Delete

Forward to

Pending list

**ANNOTATIONS**

**LINKS**

**OVERVIEW**

**RAPID TRANSPORT**  
 500 BL COUNTY BLVD  
 SUITE 100  
 FARMINGDALE, NY 11735, US  
 TEL: 631 755-9120 FAX: 631 249-2460

## INVOICE

PETERS ENGINEERING  
 356 MEADOW AVE  
 NEWBURGH, NY 12550, US  
 CONTACT:  
 TEL: 845 563 9045 FAX: 845-563-9046

Invoice #	28756799
Invoice Date	02/22/2015
Due Date	03/02/2015
SAP Address #	0018432224
Branch Code	777HBL
Department	77820
Our File #	003167425
Consolidation #	C16023099

**Our Ref#** Importer: PETERS ENGINEERING  
 Consignee: PETERS ENGINEERING

CARRIER/VESSEL FLT./VOY. DEPART. DATE	PORT OF DEPART. /COUNTRY OF EXP.	TIME DEFINITE
PO - POLAR AIR F/V#: 411 ETD: 02/28/2015	POD: Frankfurt International Apt CD: GERMANY, FED. REPUBLIC	

MASTER B/L	HOUSE B/L	SUBHOU B/L	MT	INCOTERMS	INVS/LINES ON 7501
40364825062	MUC809701		AIR	EXW	1/1

SHIPMENT DESCRIPTION	QUANTITY	ACTUAL WGT.	CHG. WGT.	VOLUME
LITERATURE	1 PCS	33.5 Kg 73.8541 Lb	33.5 Kg 73.8541 Lb	0.202 M3 7.134cFT

ARRIVAL PORT AND DATE	SERV. LEVEL/TRAN. SERVICE	ENTRY NO.	MOT/ENTRY TYPE/APPL
Port: 4101 Date: 02/18/2015 JOHN F KENNEDY AIRPORT		169-3167303-08	40 / 01 / CHB

DESCRIPTION	AMOUNT (\$)
01. (C1001) - PACKAGE	55.00
02. (T9102) - PALLETS	75.00
03. (T6001) - AIRFREIGHT	154.00
04. (T6002) - EXPORT HANDLING	277.00
05. (C8000) - US CUSTOMS BROKERAGE - ENTRY SERVICES	100.00
TOTAL AMOUNT DUE ON 08/13/20XX \$	
LATE FEE \$	
<b>670.67</b>	

jenkins  
 2/24/2015, 7:23 AM INVOICE AMOUNT, IF PAID AFTER DUE DATE ABOVE \$

To be approved by cost center 21000

PAYMENT TERMS: Payment due within 30 days

If you are the importer record, payment to the Broker will not relieve you of liability for Customs charges (duties, taxes, or other debts Customs) in the event the charges are not paid by the broker. Therefore, if you pay by check, Customs charges may be paid with a separate check payable to the "Bureau of Customs and Border Protection" which shall be delivered to Customs by the broker." 19 CFR 111.29(b)(1). PANALPINA POLICY: All duty is paid by Panalpina ACH account on behalf of the importer. Panalpina requires prior arrangements if the importer desires to remit manual checks to Customs for each entry, or to establish their own ACH account with US Customs.

**REMIT TO ADDRESS ABOVE**

Thank you for using our services

**Please include a copy of this invoice with your payment**

Robert Rodonski

Rapid Transport

pdf

08/24/2015

162 KB

Instant access: one click on the link in the email notification and the document opens in the Viewer

## Useful Tips

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Along with invoices and delivery notes, all sorts of documents can be shown in a list. The only condition is that the documents must be stored in the file cabinet. This also applies to the email notification, which only references documents in the file cabinet. How to use lists and email notifications in your daily work:

- Fast access: for those who like to keep things simple, the link to the list can be saved in the browser or to the desktop. You would just have to click the link to open it in DocuWare.
- Tasks by email: lists and email notifications can be combined: DocuWare then e-mails a link to the list as soon as a new task is pending.
- Scheduling: you can create as many email notifications as you want in DocuWare. If you don't want to be bombarded with new tasks every minute, set the email notifications to be submitted once a day or during a certain period. Links to all pending documents will then be included in just one email.
- Always up to speed: you can also be notified when a task has not been completed. This means, for example, that the cost center manager can find out immediately when an invoice has not been approved. He can intervene before the workflow slows down.
- Email notification as subscription: specify which employees should be automatically notified if, for example, the construction drawing for the new machine changes. Employees can also subscribe to receive released email notifications.



This document can also be found here:

<http://pub.docuware.com/en/task-manager>

For more information please visit our website at:

[www.docuware.com](http://www.docuware.com)