



Module 11 – Field Management

Chapter 01

PROJECT USER TASKS

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Field Management – Project User Tasks

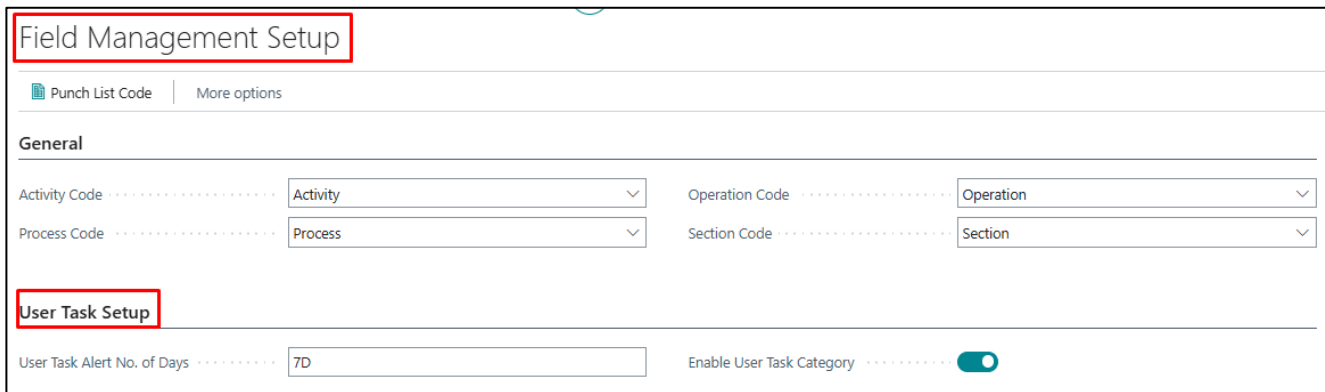
INTRODUCTION

The User Task functionality provides allows you to create User Tasks and link that task to the different ProjectPro modules like Subcontract, Progress Billing, Project Quote, etc. On the ProjectPro Manager and Field Manager role center, a shortcut is provided in the form of cues where these user tasks can be viewed based on Due Dates and Category.

SETUPS

1. Field Management Setup

On the Field Management Setup, there are two setups under the User Tasks fast tab.

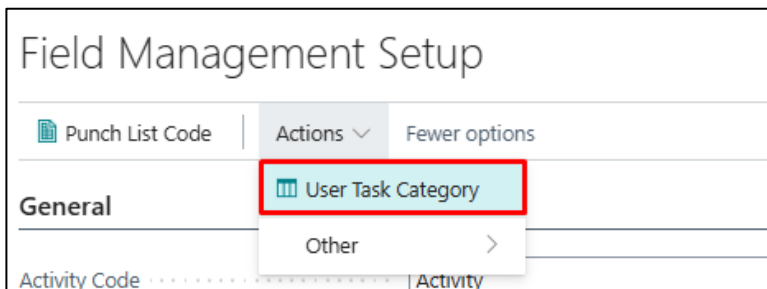


The screenshot shows the 'Field Management Setup' form. The 'General' section includes dropdowns for Activity Code (Activity), Operation Code (Operation), Process Code (Process), and Section Code (Section). The 'User Task Setup' section includes a text input for 'User Task Alert No. of Days' (7D) and a toggle for 'Enable User Task Category' which is turned on.

- **User Task Alert No. of Days:** Specifies the no. of days within the date range of the "Current Date" and the "Due Date" to trigger an alert Cue on the role center to act. For example, a defined value is 7D here, then if the user task's Due Date is within 7 days from the work date, it will trigger a notification.
- **Enable User Task Category:** Enable it to use User Task Cues on the Role Center. You can also set the sequence and names of the Cues from the "User Task Category" page available on this setup's ribbon under the Actions section.

2. User Task Category List

The User Tasks Category List can be accessed when the "Enable User Task Category" is enabled on the Field Management Setup. On this page, you can specify the name and sequence of the Cues to appear on the ProjectPro Field Manager role center.



The screenshot shows the 'Field Management Setup' form with the 'Actions' menu open. The 'User Task Category' option is highlighted with a red box, and the 'Other' option is also visible below it.

Field Management – Project User Tasks

Here you can define up to 7 names and sequences of the cues only.

User Task Category List				✓ Saved	🔖	📄	↗				
				🔍	🔄	+ New	🛠 Edit List	🗑 Delete	🔗	🔍	☰
No.				User Task Cue Sequence ↑							
→	PROJECT LOG		⋮								1
	SUBMITTAL										2
	TRANSMITTAL										3
	RFI										4
	RFQ										5
	MISCELLANEOUS										6
	SAFETY										7

USER TASKS

1. User Tasks on ProjectPro Manager and Field Manager Role Center

On the “ProjectPro Field Manager” Role Centre, the User Task Cues are available under the section “Activities ProjectPro” with headings “Project User Task” and “Overdue Project User Task”.

ProjectPro Cloud - NA | ProjectPro Reports ▾ | ProjectPro Reports (Cont.) ▾ | All Reports | ☰

Projects | Subcontracts | Project Daily Log | Crew Time Sheet | Items | Resources | Vendors | Customers | Punch List

Activities ProjectPro

Project User Tasks

PROJECT LOG	SUBMITTAL	TRANSMITTAL	RFI	RFQ	MISCELLANEOUS	SAFETY	Due in 3 days	Due in 7 Days	Due in more t... 7 days
0	0	0	0	0	0	0	0	0	0
>	>	>	>	>	>	>	>	>	>

Over Due Project User Tasks

PROJECT LOG	SUBMITTAL	TRANSMITTAL	RFI	RFQ	MISCELLANEOUS	SAFETY	Total Over Due
0	0	0	0	0	0	2	2
>	>	>	>	>	>	>	>

Project User Tasks: This shows the user tasks that have a due date after the work date.

Overdue Project User Tasks: This shows the user tasks that have a due date before the work date.

Field Management – Project User Tasks

2. User Task Creation

Search for the “User Tasks” from the Global Search and click on “New” from the related page that opens.

This will open a new user task card for you to enter the required details.

FAST TABS	FIELDS	DESCRPTION
General	Subject	Specifies the title of the task.
	Task Description	Specifies what the task is about.
	User Created By	Specifies the user who created the task.
	Created Date	Specifies the date on which the task is created.
Status	User Assigned To	Specifies the user assigned to the user task.
	User Task Group	Specifies the user group assigned to the user task.
	Due Date	Specifies the due date of the task must be completed. Based on this, the user tasks are divided into Project User Tasks (due date before work date) and Overdue Project User Tasks (due date after work date) on the role center.

Field Management – Project User Tasks

	% Complete	Specifies the progress of the task.
	Start Date	Specifies the date the task must start.
	Priority	Specifies the priority of the task from the 3 given options: Low, Normal, High
	User Completed By	Specifies who completed the task.
	Completed Date	Specifies when the task was completed.
Task Item	Link Task To	Specifies if you want to link the user task to a Report or a Page.
	Report/Page	Based on the selection in the above field, select the required report or page from the objects list to which you want to link this user task.
	Resource Name	Specifies the name of the resource that is assigned to the task.
	Project No.	Specifies the Project No. you want to assign to the user task.
	Task No.	Select the Project Task No. you want to assign to the user task based on the Project No. selected above.
	Task Category	Select among the different task categories you want to assign to the user task: Job Material Planning, Job Quote, Job Task, Progress Billing, and Subcontract.
	Task Item	Select the related document to link based on the Task Category selected above.
User Task Category	Select the user task category to which the user task belongs. This classifies the Cue on which the user task will appear on the role center.	

After assigning all the values, you can open the linked task item of the user task using the “Go to Task Item” option on the user task’s ribbon on the card. See below example based on the value selected above on the user task card, a progress billing requisition gets opened.

Progress Billing ✓ Saved

J00040 · 1 · 1

Home Reports Actions Related Fewer options

General >

Progress Billing Subform [Manage](#) Line

New Line Delete Line

Item No.	Project No.	Revenue Cat. Description	Project Task No.	Segment Code	Description	Billing Method	Base Amount	Quantity	Unit of Measure Code
→ 1	J00040		00-23	SEG-01	Crushed Stone #2	%	63,950.00	0.00	EA
2	J00040		00-23	SEG-02	Foam Air Conditioner Side Pnl	%	3,106.00	0.00	EA
3	J00040		00-24	SEG-02	Mtl Access Door- Wall/Ceiling	%	1,290.74	0.00	EA
4	J00040		00-55	SEG-02	580 Backhoe	%	4,831.00	0.00	HR
9	J00040		CONTRACTS		Petty Cash	%	6,700.00	10.00	