



# MR.TASK

## SYSTEM MANUAL

This document contains all the information that a person need to use and setup MRTask.  
MRTask is a SaaS (Software as a Services). For more information, contact [info@mrtask.it](mailto:info@mrtask.it)

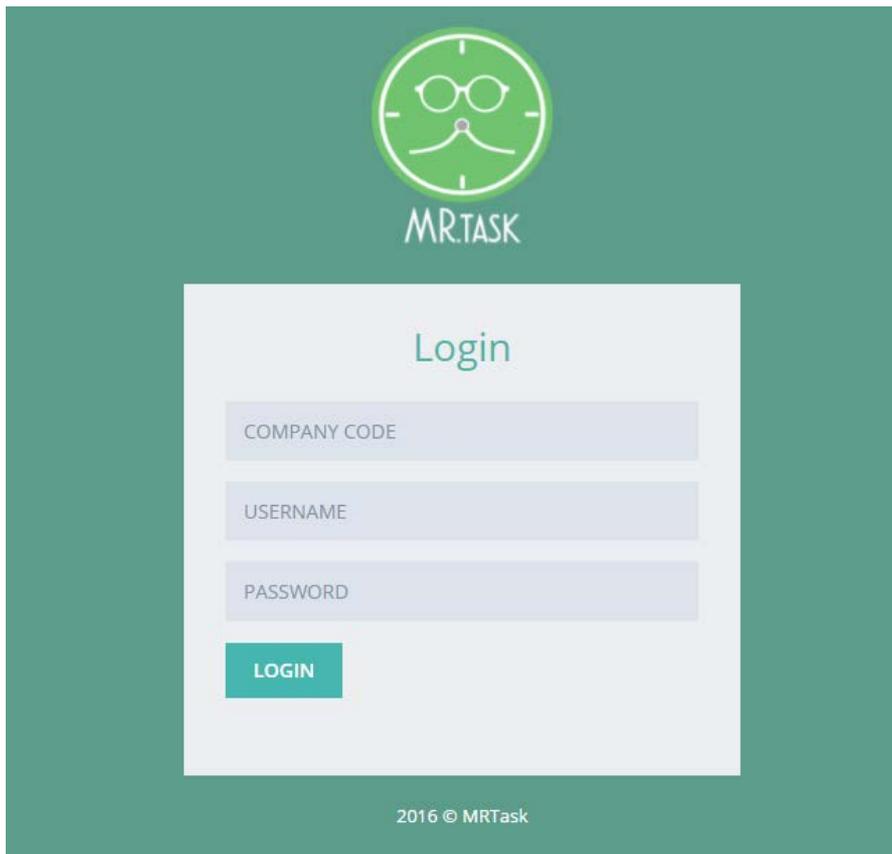
If you wish to do a login in **MRTask**, first of all you need to have an account. If you don't have any enabled user, please go in this website section, and contact the an administrator:

<http://mrtask.it/contatti/>

Once you've received company code, user and password, you'll be able to do the login at the following link:

<http://webapp.mrtask.it/>

The login page should be similar to this one:



The login system is called SSO (Single Sign On). For example we've two people, A and B that have the credentials of an user called "MickeyMouse".

If user A is already logged with "MickeyMouse" and user B try to do the login with the same user, user B could take two decisions:

1. Take user A session, and start to work with user "MickeyMouse" ;
2. Don't take the session ;

These options will be took from a system popup.

## THE LOGIN

In this page you'll find all the information for do the login in the MRTask panel.

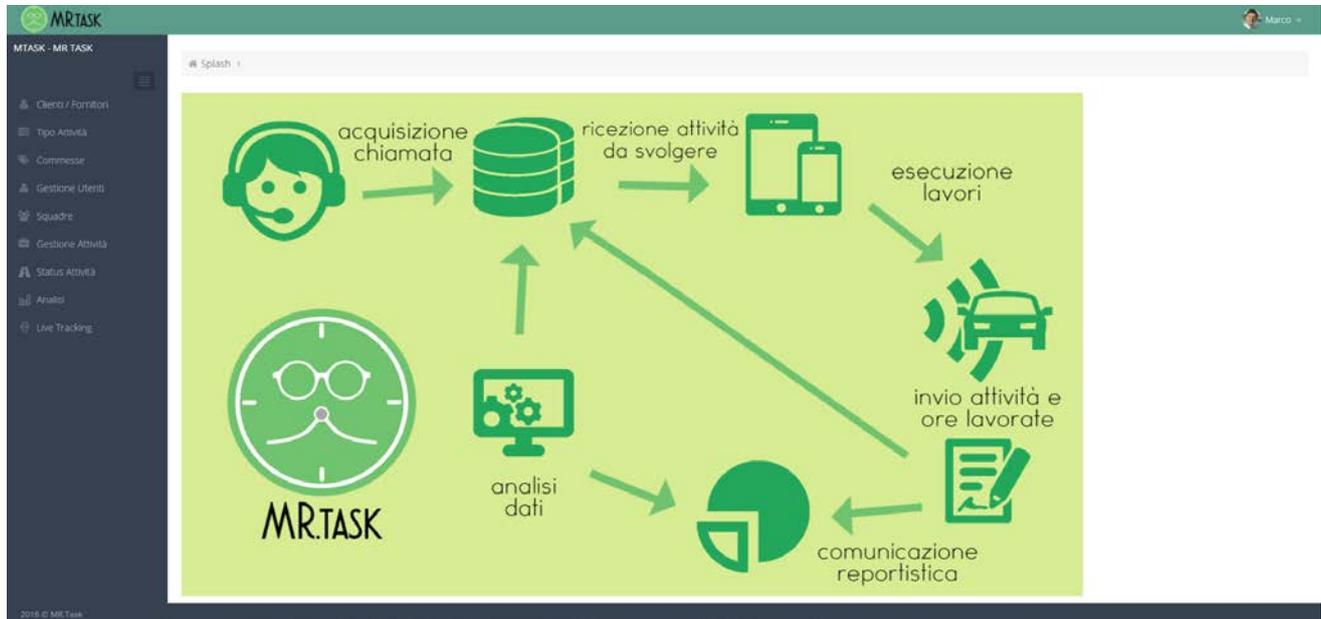
For more information, check the official website:

<http://www.mrtask.it>

## Splash Page

After the login in **MRTask**, the first thing that we can see is the splash page, that have an image that will resume how the system should work.

As you could see, the hearth of the system is the left menù.



The menù have the following voices:

1. Customers / Suppliers ;
2. Activity type ;
3. Orders ;
4. User Management ;
5. Teams ;
6. Activity Management;
7. Activity Status ;
8. Report ;
9. Live Tracking ;

Each menù voices allow to enter in a dedicated software area.

It's time to try the system !

## Customers / Suppliers

The first voice of the menù is the customers / suppliers.  
By clicking on it, you'll see a page like the below image:



Each menù voices have a redirect to a main page, that will be so similar between them.  
This pages will have a summary table with the inserted data, and you'll be also able to apply some filter for get the interested informations.

As you can see in the screenshot, you'll find some numbers (1,2,3 and 4) in red, that stays for:

1. Add a new customer / supplier. You'll find the add button in many pages ;
2. Search filter by text input ;
3. Export in .csv or .xls ;
4. Filter reset ;

Let's see how to add a customer !

We are ready to add, for example, The BIG BUG company that have his headquarter in Milan.  
When we've added all the information, we'll be ready to click on the "Save" button in the bottom right of the window.

If the data inserted are correct, we'll be able to see the customer in the summary table.

As you've saw, in the insert area, there was a field called "Obsolete". You'll find this field many timesm because, if is set to "Yes", mean that you're able to call again this record in other situation, but, if is set to "No", you are not able to use that information anymore.

Codice AZ.	Nome Azienda	Nazione	Indirizzo	Località	CAP	Provincia	P.IVA	C.F.	Valuta	Obsoleto	Azioni
AZ0010	BIG BUG srl	Italia	Via BIT 01	Milano	20121	Mi	010101010101	0101010101010101	EURO	N	  

Another area that is so important in the summary table, is the "Actions" column.

By clicking on one of the 3 icon, you'll be able to: view, edit and remove the interested row.

That's so simple ! Now, let's see how to create an activity type.

## Activity Type

By clicking on the menu voice “Activity type”, you’ll be redirected to a page that is so similar to the last one.



Also here, you’ll be able to apply filters, export, view, edit and remove records. This method is applied on all pages.

Let’s add an activity type:



The requested information are:

1. Activity code, the must be unique ;
2. Description ;
3. Unit of measure ;
4. Cost ;
5. Revenue ;
6. Obsolete ;

Once that the information are inserted and saved, we are ready to insert an order !

## Orders

By clicking on the menu voices “Orders” we’ll go in the dedicated section.  
The requested information for an order are:

- Order Year ;
- Order Number ;
- Description ;
- Note ;
- Customer ;
- Forecasting Cost;
- Forecasting Revenue ;

Let’s apply the order to the BIG BUG company, that we’ve created before:

Aggiungi CommesseCommesse

Home > Aggiungi Commesse

### Aggiungi Commesse

Anno Commessa *	Numero Commessa *
2017	1
Descrizione *	Note
impianto di climatizzazione	Note
Nome Azienda *	Costo Previsionale
BIG BUG srl	400,00
Ricavo Previsionale	
700,00	

In three simple steps, we’ve created: a company, an activity type and an order.

It’s time to manage our team to do an assigned task !

## User Management

The user management section is a very important area of MRTask. There are 3 kind of user, and each type could do some task.

The user type are:

1. Backoffice ;
2. Frontoffice ;
3. Operator ;

### Backoffice

The backoffice user is the user that should add the tasks in the system, manage the team and assign them the jobs. He've also the possibility to check the data from the report page.

### Frontoffice

The frontoffice user is the "team leader" and is the operator that will have an Android smartphone or tablet. In the application he'll be able to change the task status and insert the dedicated hour of his team member.

### Operator

The operator is just a simple user, that haven't any access in the system, but is used to know the amount of hour dedicated for each activity.

By the way, is possible have an user that have **frontoffice + backoffice** privileges.

### How many user can I have ?

You can have an unlimited number of *operator* users, but, MRTask is a SaaS system, and the number of the *frontoffice* or *backoffice* user is limited. The limit is defined in the contract that we'll take.

By the way, an user that have **frontoffice + backoffice**, will be counted as a single user.

Now, let's create an operator user:

Aggiungi Gestione Utenti Gestione Utenti

Home > Aggiungi Gestione Utenti

Aggiungi Gestione Utenti

Nome *	Cognome *
Mario	Rossi
Email *	Username *
mariorossi@email.com	ROSSIMA
Password *	Obsoleto *
*****	No
<input type="checkbox"/> Administrator	<input type="checkbox"/> Backoffice
<input checked="" type="checkbox"/> Operatore	<input type="checkbox"/> Frontoffice

Salva Annulla

The requested fields are: name, surname, email, username, password, obsolete and user type.

When you've added the user, you're ready to create the team.

## Teams

Let's go in the teams section and press on "Add".

The first thing that you'll insert is the team name and the team leader. The team leader, as you could see, is the frontoffice user. Let's create the "Alpha" team.



Aggiungi Squadre

Home > Aggiungi Squadre

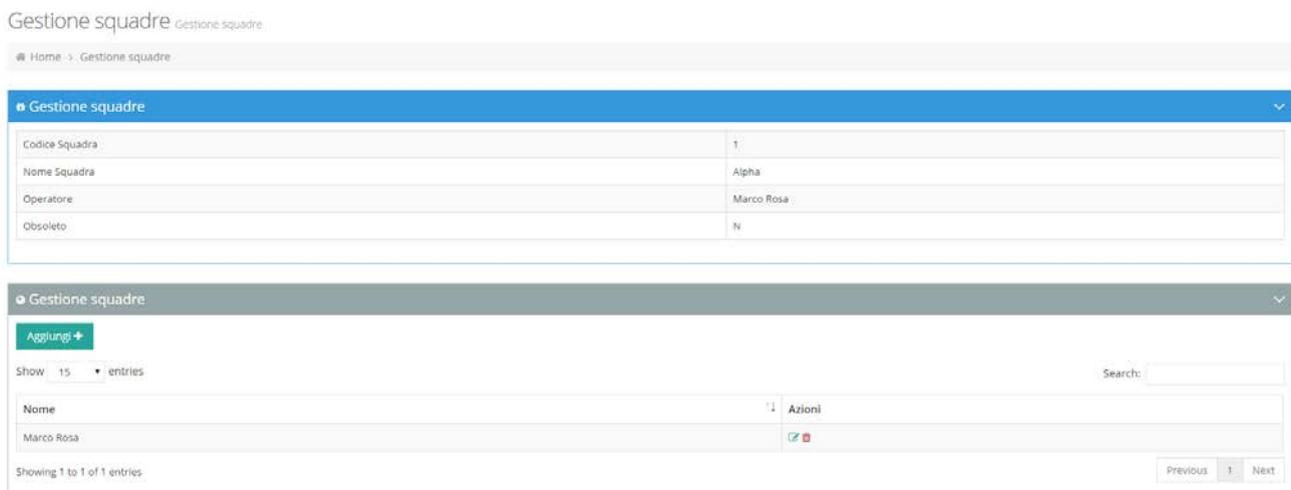
Nome Squadra\* Alpha

Caposquadra\* Marco Rosa

Obsoleto\* No

Salva Annulla

Once the team is created, you've to click on "Management", that should be available in each team's summary table record.



Gestione squadre

Home > Gestione squadre

Codice Squadra	1
Nome Squadra	Alpha
Operatore	Marco Rosa
Obsoleto	N

Aggiungi +

Show 15 entries Search:

Nome	Azioni
Marco Rosa	<input checked="" type="checkbox"/> <input type="checkbox"/>

Showing 1 to 1 of 1 entries Previous 1 Next

Click again on "Add" for insert the *operator* that we've created before and press save.

We've already created the team, let's assign them a task !

## Activity Management

Let' assign an activity to our team.

The procedure is really simple, you must insert all the required film:

Aggiungi Attività Attività

Home > Aggiungi Attività

### Aggiungi Attività

Nome Azienda*	BiG BUG srl	Anno Commessa*	2017
Descrizione Commessa*	Impianto di climatizzazione	Data Attività*	13/06/2017
Tipo Attività*	Manutenzione Condizionatori	Descrizione Breve	Manutenzione Ordinaria
Descrizione Lunga	Manutenzione ordinaria dei condizionatori installati all'interno degli uffici della BiG BUG srl		
Squadra	Alpha	Quantità da svolgere*	5
		Status*	ASSEGNATO

As you can see here, you can also insert an activity with a Status called "TO BE ASSIGNED", because maybe you could be on a call with your customer and you don't know who should be able to do the task.

By the way, we'll assign the activity to our "Alpha" team. So, the Alpha team leader should be able to find the activity information on his mobile device.

Another information that we've to insert is the "to-do" quantity. Let's insert 5 for example.

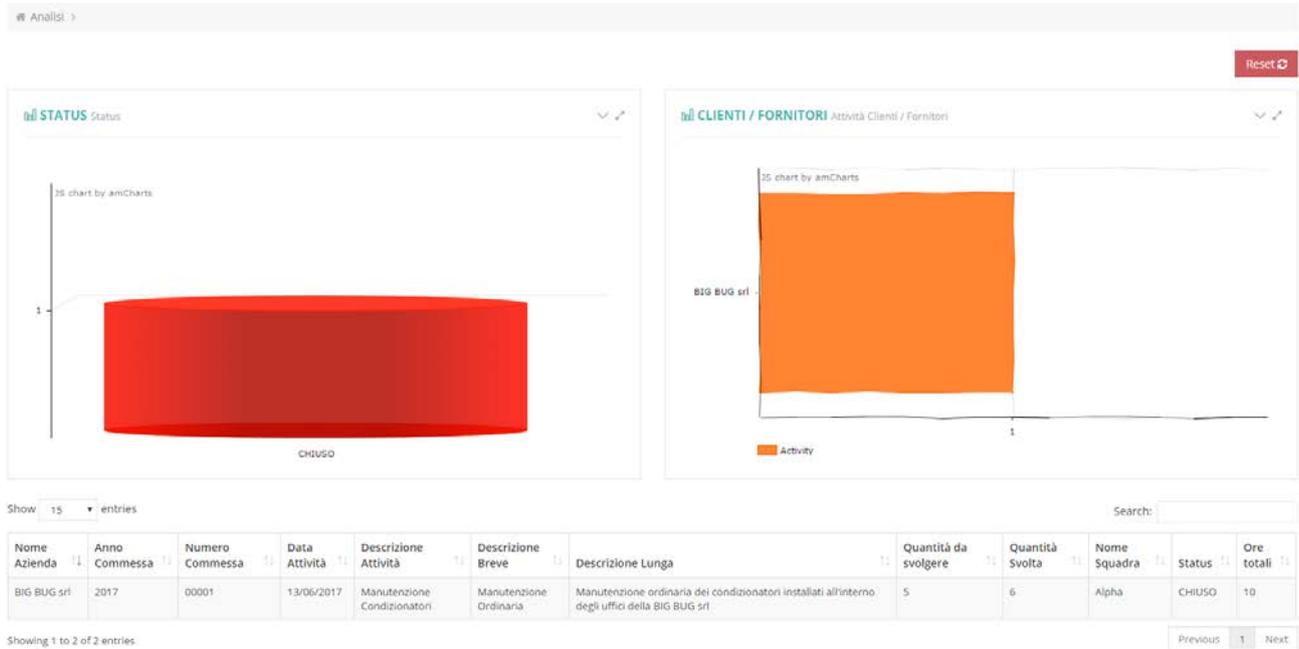
Our team leader will go on the venue, solve the task and then will be able to close it. When he've to insert the quantity done, he could insert more quantity than the "to-do" quantity, because maybe found a different situation on the venue. So, for example, he'll insert 6 in the quantity done and 5 hour for each person that were with him.

## Report

If we go in the report page, we'll find graphs, that are interactive by clicking on it.

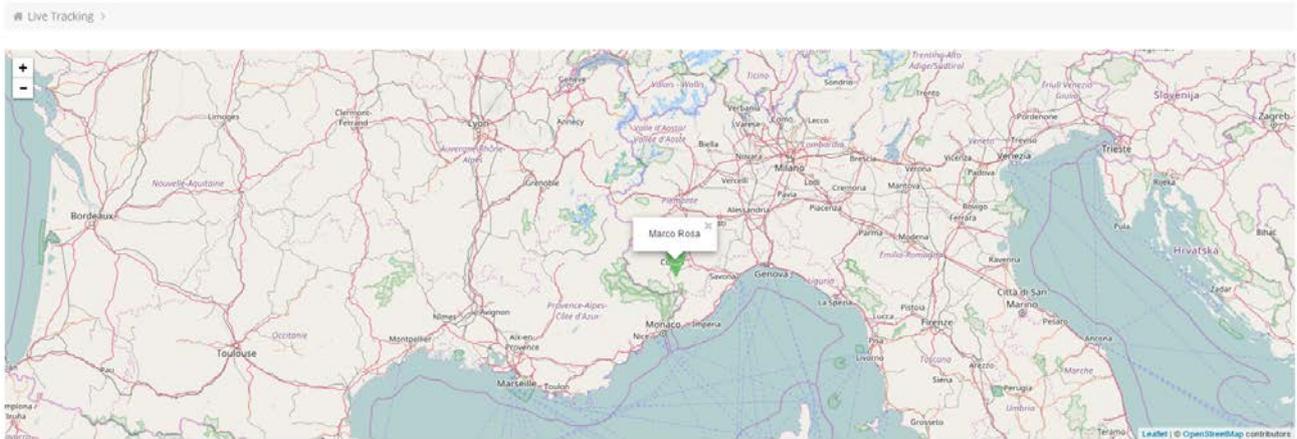
As you can see in the summary table, you'll see the amount of hour dedicated to a single task by a team.

You'll find also other situation: how many tickets you've closed, you've assigned, etc...



## Live Tracking

In the live tracking area we'll be able to see the GPS position of each team leader. So we'll now if they are on the correct venue. Amazing no ?



## Activity Status

Right, we've said that our frontoffice user have closed the ticket, by changing the status. But how many status we can have ?

The system have 4 default status:

- To assign ;
- Assigned ;
- Closed ;
- Suspended ;

Those status type are so generic, so in the activity status area, you'll be allowed to add your personal activity status

So, you are able to add other status, like "Ready to the invoice", etc..

As you can see, when you add a new activity status, there is a status called "Mobile".

A screenshot of a web application form titled "Aggiungi Status status". The breadcrumb trail is "# Home > Aggiungi Status". The form has a blue header bar that says "Aggiungi Nuovo Status". It contains two dropdown menus: "Descrizione Status\*" with the value "Mobile\*" and "Mobile\*" with the value "No". Below these is an "Obsoleto\*" dropdown menu with the value "No". At the bottom right of the form are two buttons: "Salva" (Save) and "Annulla" (Cancel).

The "Mobile" field is used if you wish to enable the status also on the frontoffice smartphone or tablet.

For more infos, visit: <http://www.mrtask.it>