

TrackForce Job Aid: How To Create & Close Taskers and Work Items

OBJECTIVE Train users to create and close Taskers and Work Items

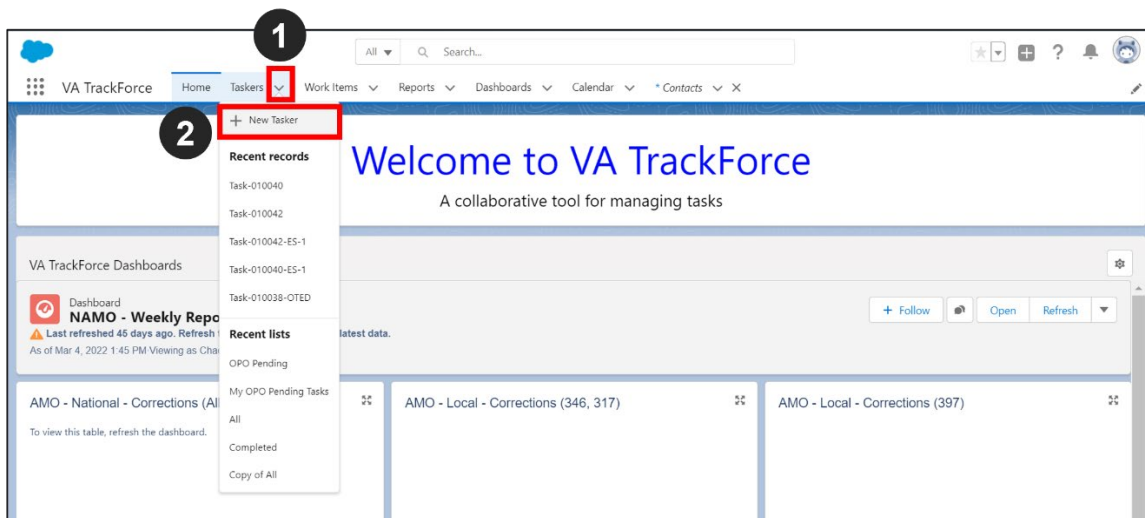
AUDIENCE OPO Front Office

INSTRUCTIONS

Pre-Step: Access the Salesforce Homepage via

https://va.lightning.force.com/lightning/o/VBA_COS_Tracker_c/list?filterName=Recent

1. Select the **Taskers** drop-down arrow in the tabs bar.
2. Select **New Tasker** from the top of the drop-down.



3. A new window will appear where you can enter in relevant Tasker details.

New Tasker: OPO

Tasker Id

Days Until Due ⓘ
14
This field is calculated upon save

Days Tasker Past Due
-14
This field is calculated upon save

Short Turnaround

Tasker Information

Original Email Subject

Assigned By ⓘ
--None--

Date Originally Received

OPO Status

Initial Tasker Due Date

Cancel Save & New Save

4. Continue populating relevant Tasker fields and ensure you enter information into the following required fields under Assignments Information:

- a. Division
- b. Assigned To

5. Click **Save**. Your Tasker is now created.

Subject ⓘ

Task Description

Assignments Information

Division ⓘ **a**
OPO Front Office

Assigned To ⓘ **b**
Purnima Mummareddy

Secondary Assigned To
Search Contacts...

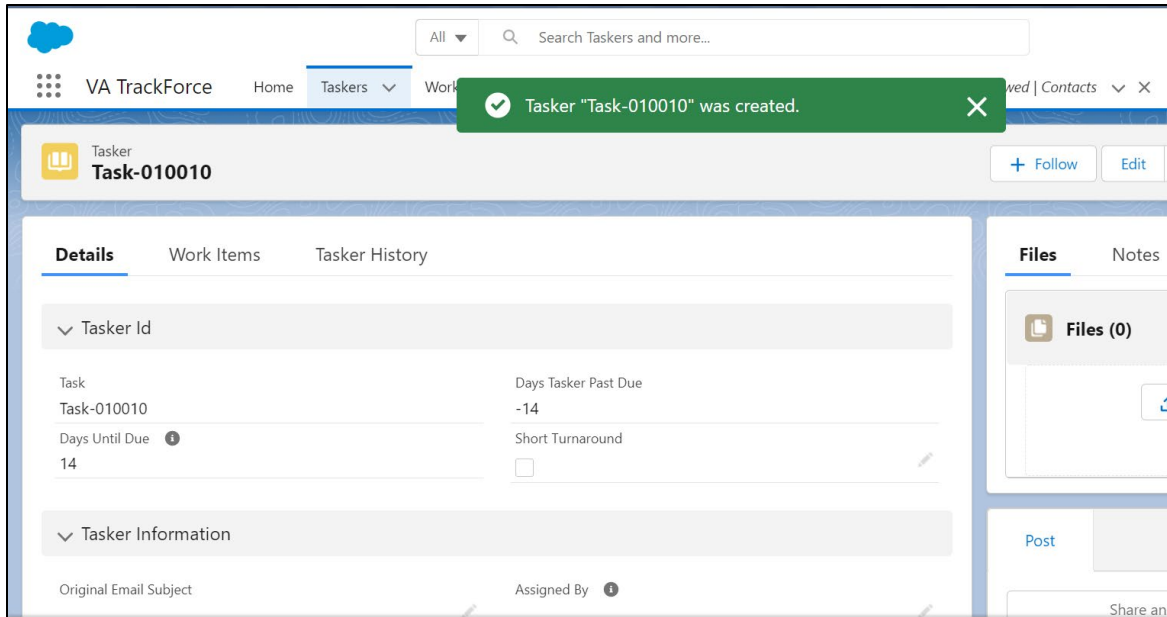
Document Folder Location

Final Response Location

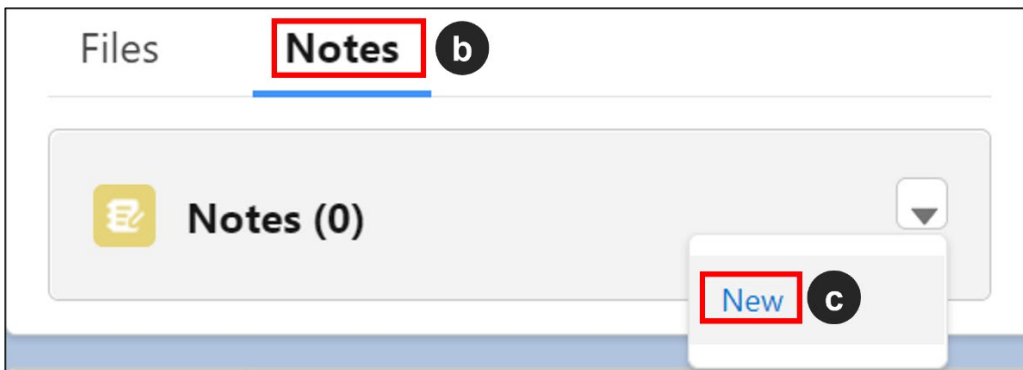
Outlook filing location

Cancel Save & New Save **5**



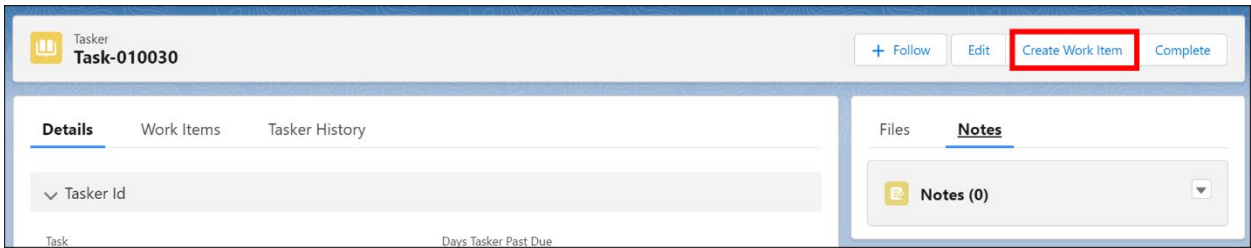


6. If you need to add any notes, click on the **Taskers** tab. Any text entered in Notes is visible downstream for business line users, so use Notes sparingly.
 - a. Click on the relevant tasker.
 - b. Click **Notes**.
 - c. Click **New** to add a note to the tasker.



Note: Per VBA Policy, users should not utilize the **Files** section in TrackForce to upload files.

7. Once a Tasker has been created, users should then create associated Work Items. Click **Create Work Item** in the upper right-hand corner.



8. A new window will appear where you can enter in relevant Work Item details. Enter in information into the following required fields:
 - a. Business Lines
 - b. Work Item Type
 - c. Date Received – This line will default to the current date and time.
 - d. Enter Business Line Task Description – This line will default from the Task Description field entered on the original Tasker, if applicable.

Note: The Business Lines and Work Item Type fields will automatically populate based on the first option in the picklist. Users should make sure to update this field if it is not correct.

Create Work Item

Short Turnaround

Create For Multiple Business Lines

* Business Lines **a**

00Reg

* Work Item Type **b**

Acknowledgment

* Date Received **c**

May 10, 2022 12:13 PM

Date Due to OPO

* Enter Business Line Task Description **d**

Next



9. Click the Create for Multiple Business Multiple Business Lines checkbox if creating duplicate work items across different business lines. Use the Ctrl button to select relevant business lines.

10. Click **Next**. Your Work Item has now been created.

Create Work Item

Short Turnaround

Create For Multiple Business Lines **9**

*Business Lines

- 00Reg
- Board of Veterans Appeals
- Chief of Staff (20A)
- Chief Production Officer (20CP)
- Compensation Service (21C)

*Work Item Type

Acknowledgment

10 [Next](#)

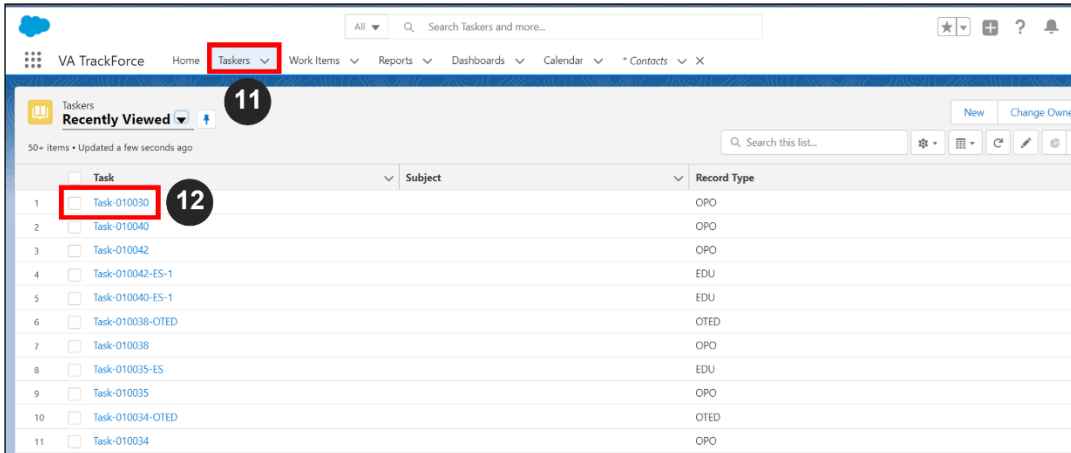
Note: The status of a Tasker will be updated to In Progress once a Work Item has been created under it.



As work is completed on Work Items and thus the overall Tasker, users should proceed to close these items in the system. The following steps will outline this process.

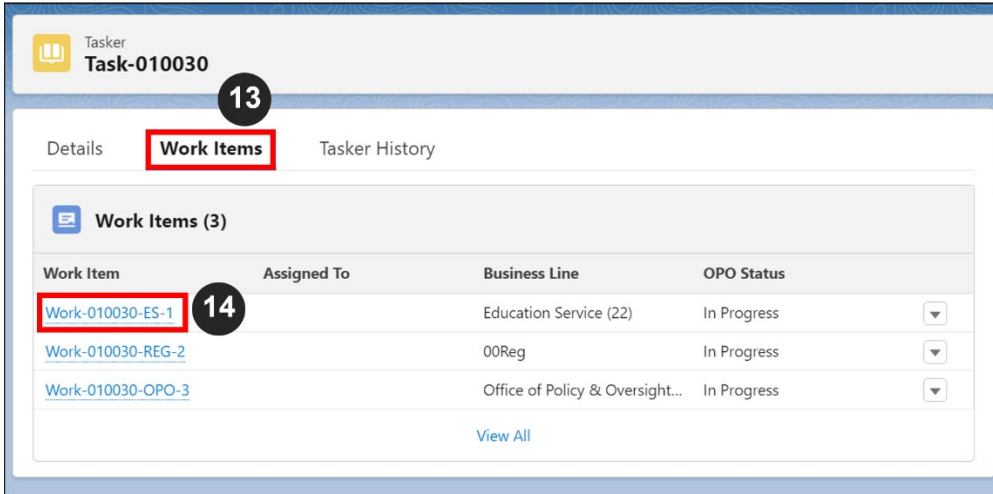
11. To proceed to close work items, click **Taskers** in the tabs bar.

12. Click on a specific Tasker for more information.

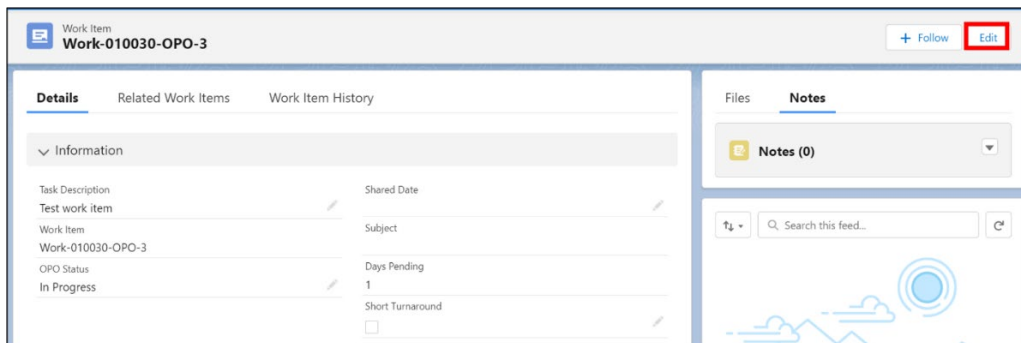


13. Click **Work Items** to view the Tasker's associated work items.

14. Click on a specific Work Item for more information.



15. Click **Edit** in the upper right-hand corner to update the Work Item.

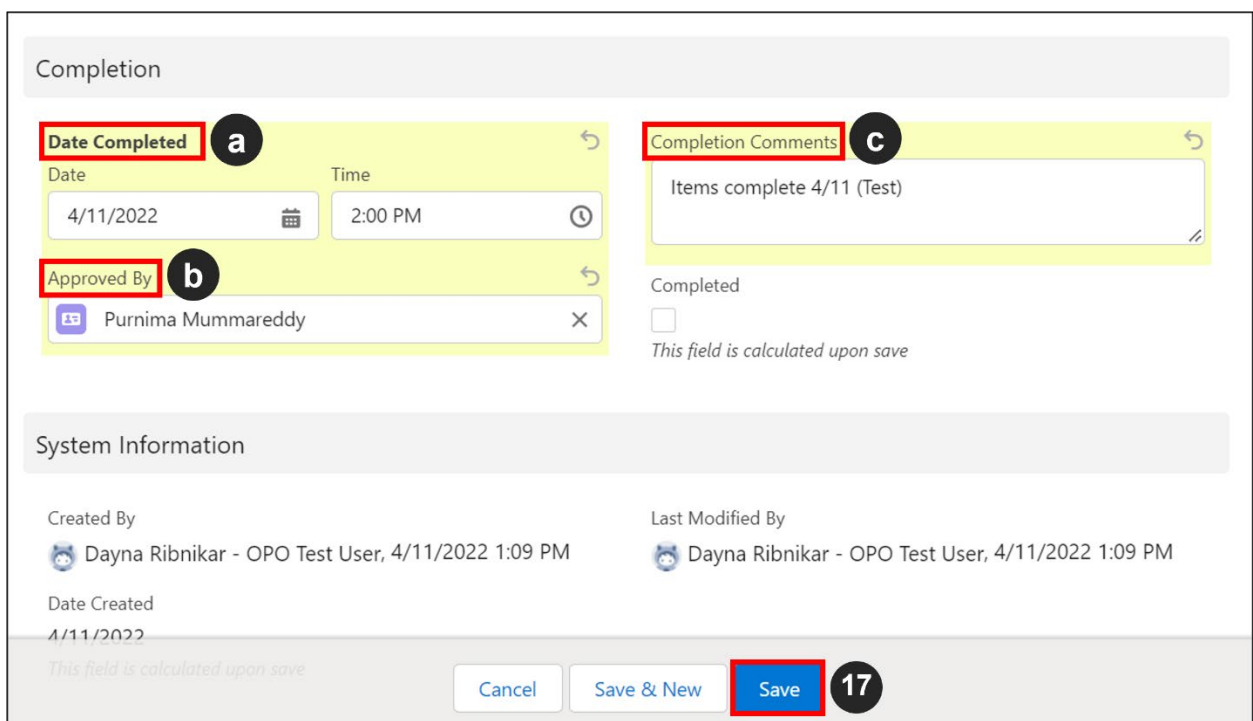


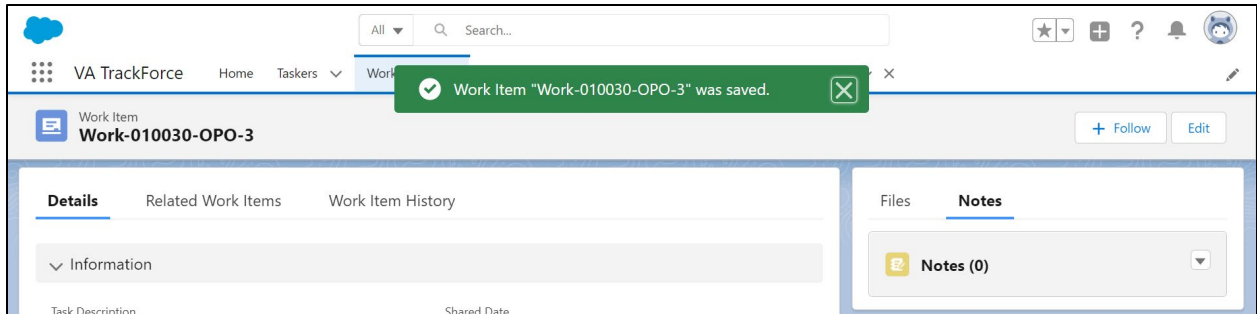
16. Scroll down to the Completion section to enter in completion information:

- a. Date Completed
- b. Approved By
- c. Completion Comments

NOTE: The Initial Work Item Due Date field must be filled in to mark the Work Item as complete.

17. Click **Save** to mark the Work Item as complete. Your Work Item is now marked as complete.



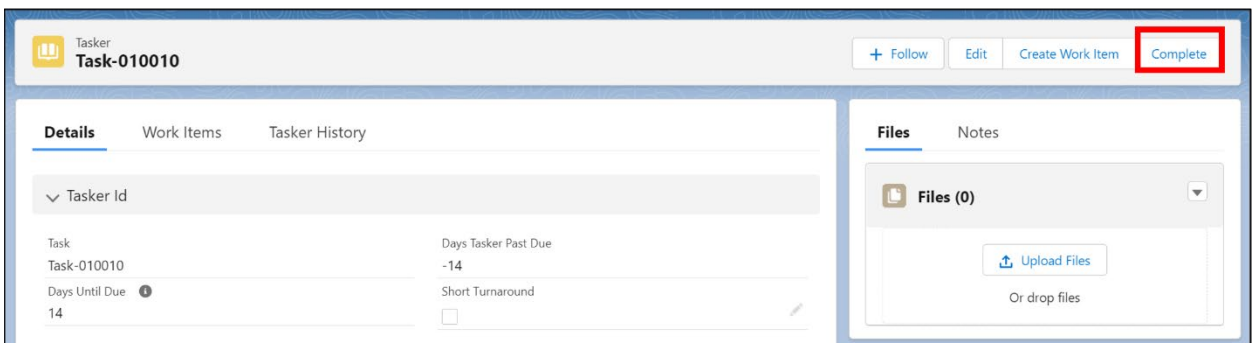


18. Navigate back to the Work Item list view as seen in step 13. Confirm all Work Items have been marked as complete.

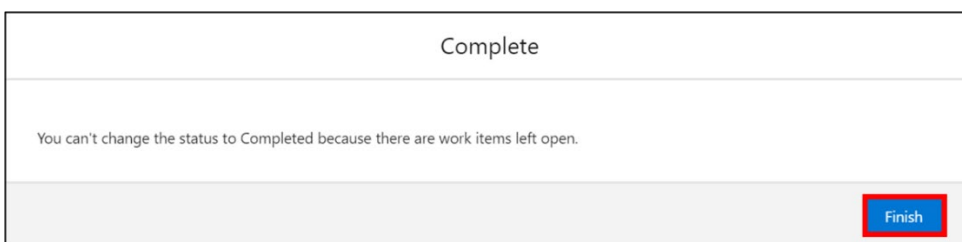
Tasks > Task-010030
Work Items
3 Items • Updated a few seconds ago

Work Item	Assigned To	Business Line	OPO Status	Initial Work Item Due D...	Completed
1 Work-010030-ES-1		Education Service (22)	Completed	4/8/2022 12:00 PM	<input checked="" type="checkbox"/>
2 Work-010030-REG-2		00Reg	Completed	4/8/2022 12:00 PM	<input checked="" type="checkbox"/>
3 Work-010030-OPO-3		Office of Policy & Oversight (OPO) (20PO)	Completed	4/8/2022 12:00 PM	<input checked="" type="checkbox"/>

19. Click **Complete** in the upper right-hand corner to complete a Tasker. Completing a Tasker will officially mark the item as Closed.



Note: A user will receive the error below if they attempt to close a Tasker with open work items. To proceed, click **Finish** and move to close out the associated work items.



20. Enter in completion comments and then click **Next**.

Complete	
* Completion Comments	
<input type="text" value="Work completed 4-5"/>	
Next	

21. Tasker status has now been updated to Complete. Click **Finish** to finalize the process.

Complete	
Status has been changed to Completed	
Previous Finish	

