

TrackForce Job Aid: How To Manage a Work Item

OBJECTIVE Train users to Manage a Work Item

AUDIENCE OPO Analysts

INSTRUCTIONS

Pre-Step: Access the Salesforce Homepage via

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

1. Select **Taskers** in the tabs bar.
2. Click on a specific Tasker for more information.

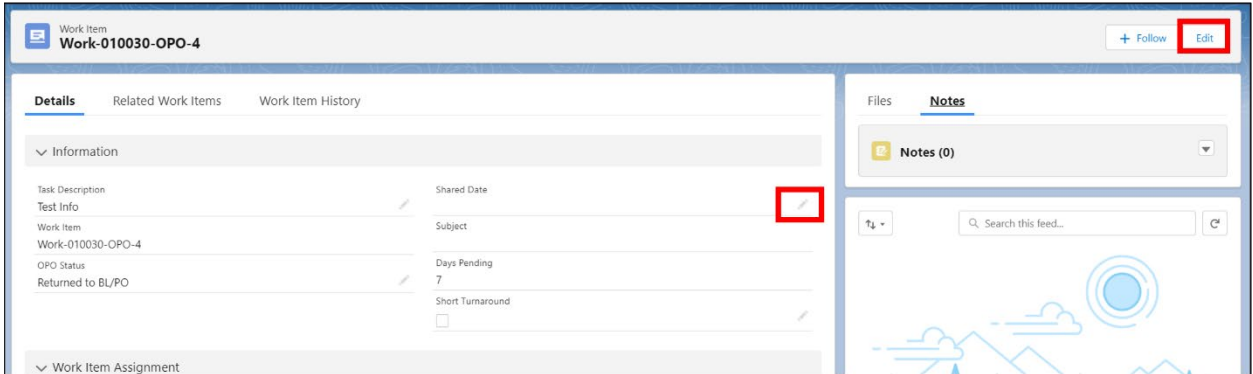
Task	Subject	Record Type
1 <input type="checkbox"/> Task-010030		OPO
2 <input type="checkbox"/> Task-010040		OPO
3 <input type="checkbox"/> Task-010042		OPO
4 <input type="checkbox"/> Task-010042-ES-1		EDU
5 <input type="checkbox"/> Task-010040-ES-1		EDU
6 <input type="checkbox"/> Task-010038-OTED		OTED
7 <input type="checkbox"/> Task-010038		OPO
8 <input type="checkbox"/> Task-010035-ES		EDU
9 <input type="checkbox"/> Task-010035		OPO
10 <input type="checkbox"/> Task-010034-OTED		OTED
11 <input type="checkbox"/> Task-010034		OPO

3. Click **Work Items** to view the Tasker's associated work items.
4. Click on a specific Work Item for more information.

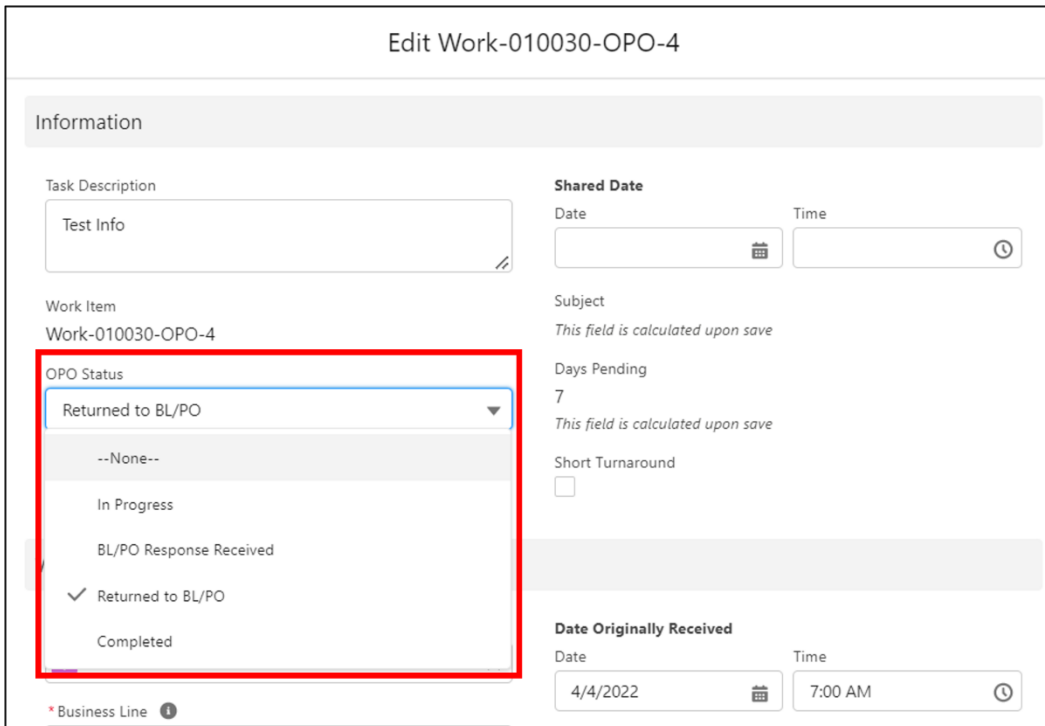
Work Item	Assigned To	Business Line	OPO Status
Work-010030-ES-1		Education Service (22)	In Progress
Work-010030-REG-2		00Reg	In Progress
Work-010030-OPO-3		Office of Policy & Oversight...	In Progress



5. Select the pencil icon in the Shared Date field or click **Edit** in the upper right-hand corner to manage work item details.



6. To update the status of a work item, use the **OPO Status** picklist to select one of the following options:
- a. In Progress – Work Item is pending
 - b. BL/PO Response Received – Work Item is in progress between BL/PO review and closed status
 - c. Returned to BL/PO – Work Item is returned to BL/PO for rework and additional input
 - d. Completed – Work Item is closed



7. To document extension details on a Work Item, use the **Extension** section to fill in Extension Due Date or Extension Comments, as applicable.

Extension

Extension Due Date

Date [calendar icon] Time [clock icon]

Extension Comments

Second Extension Due Date

Date [calendar icon] Time [clock icon]

Second Extension Comments

Third Extension Due Date

Date [calendar icon] Time [clock icon]

Third Extension Comments

8. To document rework details on a Work Item, use the **Rework** section to fill in Rework Due Date, Date Rework Received or Rework Comments, as applicable.

Rework

Rework Due Date

Date 4/11/2022 [calendar icon] Time 12:00 PM [clock icon]

Rework - Not Applicable

Date Rework Received

Date [calendar icon] Time [clock icon]

Rework Comments

Second Rework Due Date

Date [calendar icon] Time [clock icon]

Date Second Rework Received

Date [calendar icon] Time [clock icon]

Second Rework Comments

Note: In order to add rework details, the work item must have a status of “Returned to BL/PO.”

OPO Status

In Progress

OPO Status must be Completed.; Please change the status to 'Returned to BL/PO' before updating Rework Due Dates.



9. Once all desired fields have been updated, click **Save** to confirm the changes.

Edit Work-010030-OPO-4

Information

<p>Task Description</p> <input type="text" value="Test Info"/>	<p>Shared Date</p> <p>Date <input type="text" value=""/></p> <p>Time <input type="text" value=""/></p>
<p>Work Item</p> <p>Work-010030-OPO-4</p>	<p>Subject</p> <p><i>This field is calculated upon save</i></p>
<p>OPO Status</p> <input type="text" value="Returned to BL/PO"/>	<p>Days Pending</p> <p>7</p> <p><i>This field is calculated upon save</i></p>
	<p>Short Turnaround</p> <input type="checkbox"/>

Work Item Assignment

<p>* Related Tasker</p> <input type="text" value="Task-010030"/>	<p>Date Originally Received</p> <p>Date <input type="text" value="4/4/2022"/></p> <p>Time <input type="text" value="7:00 AM"/></p>
<p>* Business Line</p> <input type="text" value="Office of Policy & Oversight (OPO) (20PO)"/>	<p>Initial Work Item Due Date</p> <p><input type="text" value=""/></p>

[View all dependencies](#)

Note: When a task is ready to begin the concurrence process, work items should be set to Completed status. The status at the Tasker level is then set to the appropriate concurrence level status.

