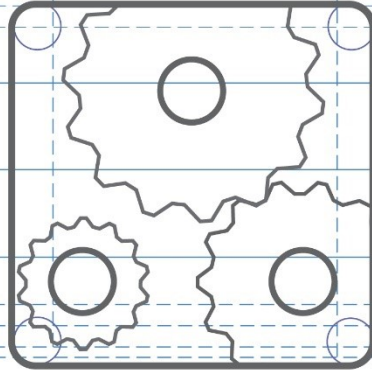


Therefore BPMS



Therefore



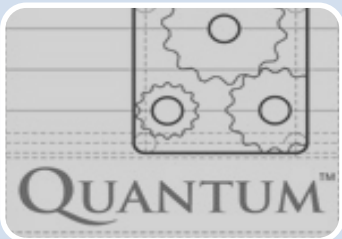
Therefore

Utilities & Features

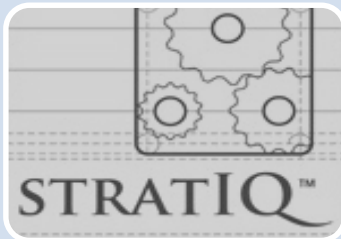


Therefore

Therefore BPMS Product Family



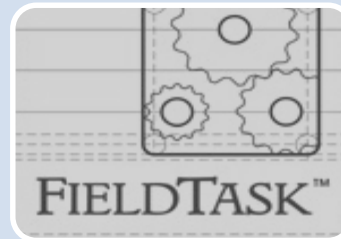
Call Centre
Management



Strategy
Execution



Help Desk
Management

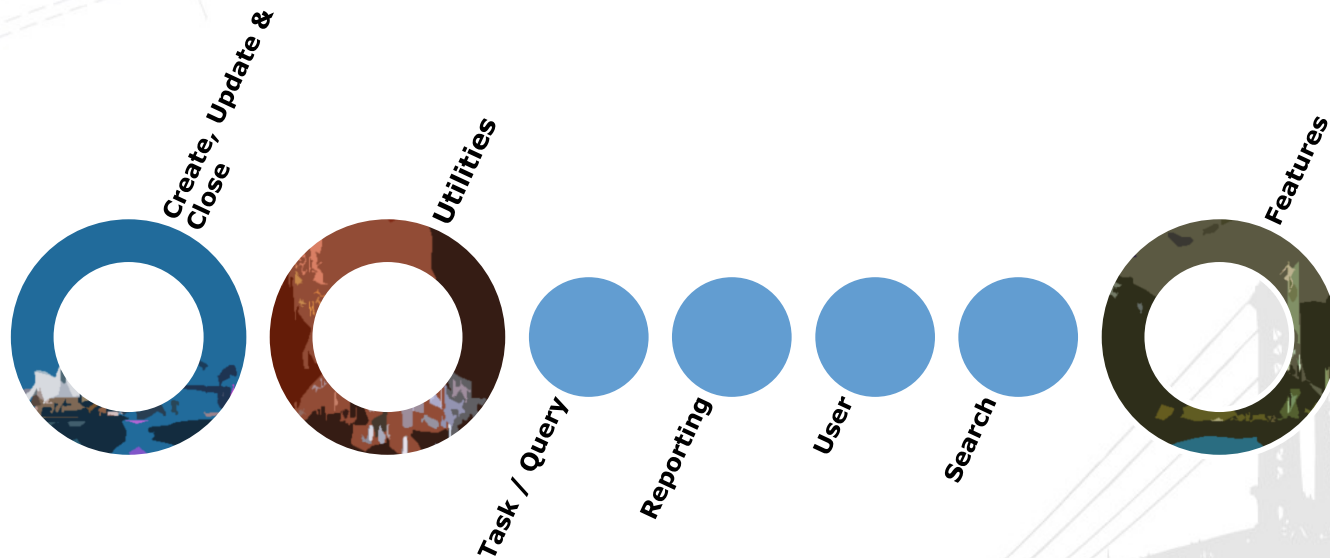


Field Task
Management



Therefore

Setting the Therefore BPMS Agenda





Therefore

Dashboard **Tasks** Comments Reminders Progress Statuses Search Reports Options Help

[Create a New Task] [My Tasks] [Tasks I Created] [My Team's Tasks] [Tasks My Team Created] [My Flagged Tasks] [Task Errors]

Strategy

Click here to create a strategy.



Tactic

Click here to create a tactic.



Project

Click here to create a project.



Task

Click here to create a task.



Activity

Click here to create an activity.



Issues

Click here to create an issue.



Risks

Click here to create a risk.



Info Request

Click here to create an information request.



Create: Strategy - Define Strategy

INSTRUCTIONS

Capture a strategy name to the "Strategy name" field and record detail of the strategy to the "Strategy details" field.

Strategy name:

Strategy details:

File Edit View Insert Format Table

↶ ↷ Paragraph **B** *I* [List Icons]

Priority:

Normal

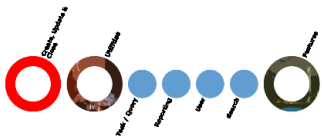
Due date / time:

08 H 00 M

Attach file:

Choose File No file chosen

Create a Task / Query





Therefore

Reference: Priority:

512

Normal

Strategy name:

xxx xxx xxx xxx xxx ...

Strategy details:

xxx xxx xxx xxx xxx xxx xxx xxx
x xxx xxx xxx xxx xxx xxx xxx x
x xxx xxx xxx xxx xxx xxx xxx
xxx xxx xxx xxx xxx xxx xxx xxx
x xxx xxx xxx xxx xxx xxx xxx x
x xxx xxx xxx xxx xxx xxx xxx x
xxx xxx xxx xxx xxx xxx xxx xxx
xxx xxx xxx xxx xxx xxx xxx xxx
x xxx xxx xxx xxx xxx xxx xxx x
xxx xxx xxx xxx xxx xxx xxx x
xxx xxx xxx xxx xxx xxx [More...]

Classification:

Call Centre

Strategy

Opened:

2019/10/03
10:02

Last updated:

2019/10/03
10:02

Goal:

2019/10/31
08:00

Created by:

Peter Lever

Allocated to:

Peter Lever

Review Task

Progress Status

Update Task

Sub Activity

Reassign Task

Record Note

Send Email

Add Comment

Set Reminder

Flag Task

Change Log



Execute Strategy (Current Entry Received On 2019/10/03 10:02)

Update: Strategy - Execute Strategy

INSTRUCTIONS

A strategy has been allocated for your attention. Please action accordingly, ensuring that you keep record of all activity and periodically update its Progress Status.

Once you have executed it, record a motivation for its closure in the space provided below and click the "Strategy Done" button to submit it for review.

Strategy name:

xxx xxx xxx xxx xxx xxx xxx xxx xxx xxx xxx xx

Strategy motivation:

File Edit View Insert Format Table



Paragraph



Priority:

Normal

Due date / time:

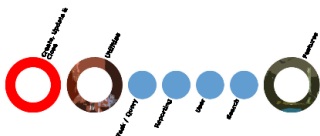
2019/10/31 08:00

Attach file:

Choose File No file chosen

Strategy Done

Update a Task / Query





GENERAL

Status:	Open
Reference:	512
Priority:	Normal
Strategy name:	XXXX XXXX XXXX XXXX XXXX XXXX XXXX XXXX XXXX XXXX
Classification:	Call Centre Strategy

Entry Listing

- Define Strategy (Initial Entry Completed On 2019/10/03 10:02)
- Execute Strategy (Entry Completed On 2019/10/03 10:05)

Update: Strategy - Review

INSTRUCTIONS

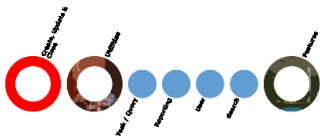
This strategy has been sent to you for review.

Should you be satisfied that it can be closed please click the "Confirm" button. Alternatively, should you believe that the strategy is incomplete, please click the "Rework" button.

Rework

Confirm

Close a Task / Query


















Therefore

Therefore BPMS Task / Query Utilities




Task / Query

-  Comments
-  Notes
-  Reminders
-  Reassignment
-  Reclassification
-  Attachments
-  Rich text editor
-  Sub activities
-  Ad-hoc communication
-  Context sensitive help
-  Change log
-  Task flagging
-  Progress status updates
-  Duplicate checker



Reporting

-  Dashboard
-  Reporting
-  External data cube feed

User

-  User self-service
-  Management visibility
-  Contact list

Search

-  Smart search
-  Quick search



► Instructions

Cancel

Save



Therefore

Reference:	Priority:
510	Normal
Strategy name:	
xxx xxx xxx xxx xxx xxx ...	
Strategy details:	
xxx xxx xxx xxx xxx xxx xxx xxx x xxx xxx xxxxxx xxx xxx xxx x xx xxx xxx xxx xxx xxxxxx xxx xxx xxx xxx xxx xxx xxx xxx xxx x xxxxxx xxx xxx xxx xxx xxx x xx xxx xxx xxx xxxxxx xxx xxx xxx xxx xxx xxx xxx xxx xxxxxx xxx xxx xxx xxx xxx xxx xxx xxx x xxx xxxxxx xxx xxx xxx xx [More...]	
Classification:	
Call Centre	
Strategy	
Opened:	2018/07/17 10:09
Last updated:	2018/07/17 10:10
Goal:	2018/07/31 08:00
Created by:	
Peter Lever	
Allocated to:	
Peter Lever	

- Review Task
- Progress Status
- Update Task
- Sub Activity
- Reassign Task
- Record Note
- Send Email
- Add Comment
- Set Reminder
- Flag Task
- Change Log



Record a Note

Instructions

Note

File Edit View Insert Format Table

Paragraph B I

ATTACH FILES

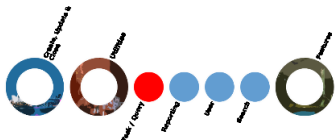
Attach file: Choose File No file chosen

Attach file: Choose File No file chosen

Cancel

Save

Task / Query – Notes





Therefore

Reference:	Priority:
510	Normal
Strategy name:	
xxxx xxxx xxxx xxxx xxxx xxx ...	
Strategy details:	
xxxx xxxx xxxx xxxx xxxx xxxx xxx x xxxx xxxx xxxxxxxx xxxx xxxx xxx x xx xxxx xxxx xxxx xxxx xxxxxxxx xxxx xxxx xxxx xxxx xxxx xxxx xxx x xxxxxxxx xxxx xxxx xxxx xxxx xxx x xx xxxx xxxx xxxxxxxx xxxx xxxx xxx xxxx xxxx xxxx xxxx xxxx xxxx xxxxxxxx x xxxx xxxxxxxx xxxx xxxx xxx [More...]	
Classification:	
Call Centre	
Strategy	
Opened:	2018/07/17 10:09
Last updated:	2018/07/17 10:10
Goal:	2018/07/31 08:00
Created by:	
Peter Lever	
Allocated to:	
Peter Lever	

- Review Task
- Progress Status
- Update Task
- Sub Activity
- Reassign Task
- Record Note
- Send Email
- Add Comment
- Set Reminder
- Flag Task
- Change Log



Set a Reminder

Instructions

FOR THE ATTENTION OF

Recipient:

Peter Lever

REMINDER

File Edit View Insert Format Table

Paragraph B I

☐ This Reminder is private

DUE DATE AND TIME

Due date:

Due time:

08 H 00 M

ATTACH FILES

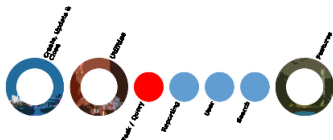
Attach file:

Choose File No file chosen

Attach file:

Choose File No file chosen

Task / Query – Reminders





Therefore

Reference:	Priority:
510	Normal
Strategy name:	
xxxx xxxx xxxx xxxx xxx ...	
Strategy details:	
xxxx xxxx xxxx xxxx xxxx xxxx xxxx x xxxx xxxx xxxxxxxx xxxx xxxx xxxx x xx xxxx xxxx xxxx xxxx xxxxxxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx x xxxxxxxx xxxx xxxx xxxx xxxx xxxx x xx xxxx xxxx xxxxxxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxxxxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx x xxxx xxxxxxxx xxxx xxxx xxxx xx [More...]	
Classification:	
Call Centre	
Strategy	
Opened:	2018/07/17 10:09
Last updated:	2018/07/17 10:10
Goal:	2018/07/31 08:00
Created by:	Peter Lever
Allocated to:	Peter Lever

- Review Task
- Progress Status
- Update Task
- Sub Activity
- Reassign Task
- Record Note
- Send Email
- Add Comment
- Set Reminder
- Flag Task
- Change Log



Reassign to another User

Instructions

SELECT USER

User:

<please select>

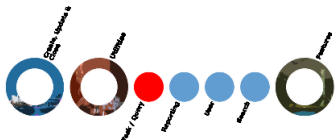
Reason:

<please select>

Cancel

Reassign

Task / Query – Reassignment





Therefore

Reference: Priority:

510 Normal

Strategy name:

xxxx xxxx xxxx xxxx xxx ...

Strategy details:

xxxx xxxx xxxx xxxx xxxx xxxx xxxx
x xxxx xxxx xxxxxxxx xxxx xxxx xxxx x
xx xxxx xxxx xxxx xxxx xxxxxxxx xxxx
xxxx xxxx xxxx xxxx xxxx xxxx xxxx
x xxxxxxxx xxxx xxxx xxxx xxxx xxxx x
xx xxxx xxxx xxxxxxxx xxxx xxxx xxxx
xxxx xxxx xxxx xxxx xxxx xxxx xxxxxxxx
xxxx xxxx xxxx xxxx xxxx xxxx xxxx
x xxxx xxxxxxxx xxxx xxxx xxxx xx [Mor
e...]

Classification:

Call Centre

Strategy

Opened:

2018/07/17
10:09

Last updated:

2018/07/17
10:10

Goal:

2018/07/31
08:00

Created by:

Peter Lever

Allocated to:

Peter Lever

Review Task

Progress Status

Reclassify

Record Note

Send Email

Add Comment

Set Reminder

Flag Task

Change Log



Reclassify Task

Instructions

SELECT OPTION

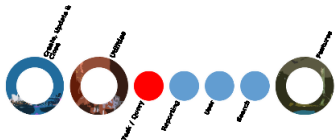
Department:

<please select>

Cancel

Next

Task / Query – Reclassification





Therefore

Tactic

Click here to create a tactic.

Project

Click here to create a project.

Task

Click here to create a task.

Activity

Click here to create an activity.

Issues

Click here to create an issue.

Risks

Click here to create a risk.

Info Request

Click here to create an information request.



File Edit View Insert Format Table



Paragraph



Priority:

Normal

Due date / time:

08 H 00 M

Invoice:

Choose File No file chosen

POD:

Choose File No file chosen

Delivery note:

Choose File No file chosen

Statement:

Choose File No file chosen

Specification:

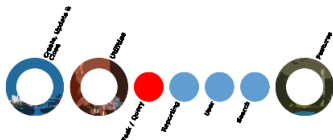
Choose File No file chosen

Cancel

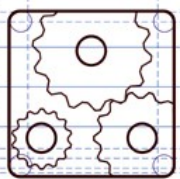
Allocate

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Task / Query – Attachments



© 2019 Therefore Strategic Technology Services (Pty) Ltd



Therefore

Strategy details:

File Edit View Insert Format Table



Paragraph



B

I

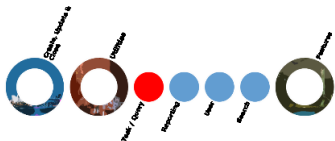


Priority:

Normal

Due date / time:

Task / Query – Rich Text Editor





Therefore

Reference: 510 Priority: Normal

Strategy name:

xxx xxx xxx xxx xxx ...

Strategy details:

xxx xxx xxx xxx xxx xxx xxx xxx
 x xxx xxx xxxxxx xxx xxx xxx xxx
 xx xxx xxx xxx xxx xxx xxxxxx xxx
 xxx xxx xxx xxx xxx xxx xxx xxx
 x xxxxxx xxx xxx xxx xxx xxx xxx
 xx xxx xxx xxxxxx xxx xxx xxx
 xxx xxx xxx xxx xxx xxx xxxxxx
 xxx xxx xxx xxx xxx xxx xxx [Mor
 e...]

Classification:

Call Centre

Strategy

Opened: 2018/07/17 10:09

Last updated: 2018/07/17 10:10

Goal: 2018/07/31 08:00

Created by:

Peter Lever

Allocated to:

Peter Lever

Reference: 512 Priority: Normal

Select Task

Review Task

Progress Status

Update Task

Sub Activity

Reassign Task

Record Note

Send Email

Add Comment

Set Reminder

Flag Task

Change Log

Reclassify



Create Sub Activity: Select Task / Query Type

Instructions

SELECT TASK / QUERY TYPE

Tactic

Click here to create a tactic.



Project

Click here to create a project.



Task

Click here to create a task.



Activity

Click here to create an activity.



Issues

Click here to create an issue.

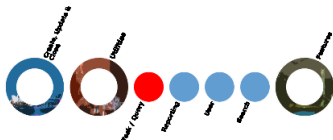


Risks

Click here to create a risk.




Task / Query – Sub Activities





Therefore

Reference:	Priority:	Select Task
510	Normal	Review Task
Strategy name:		Progress Status
xxx xxx xxx xxx xxx xxx		Update Task
Strategy details:		Sub Activity
xxx xxx xxx xxx xxx xxx xxx xxx		Reassign Task
x xxx xxx xxx xxx xxx xxx xxx xxx		Record Note
xxx xxx xxx xxx xxx xxx xxx xxx		Send Email
xxx xxx xxx xxx xxx xxx xxx xxx		Add Comment
x xxx xxx xxx xxx xxx xxx xxx xxx		Set Reminder
xxx xxx xxx xxx xxx xxx xxx xxx		Flag Task
xxx xxx xxx xxx xxx xxx xxx xxx		Change Log
x xxx xxx xxx xxx xxx xxx xxx		Reclassify
Classification:		
Call Centre		
Strategy		
Opened:	2018/07/17 10:09	
Last updated:	2018/07/17 10:10	
Goal:	2018/07/31 08:00	
Created by:	Peter Lever	
Allocated to:	Peter Lever	
Reference:	Priority:	Select Task
512	Normal	Review Task
Strategy name:		Update Task

Send an Email

Instructions

RECIPIENT DETAILS

Search:



SUBJECT

EMAIL MESSAGE

File Edit View Insert Format Table



Paragraph



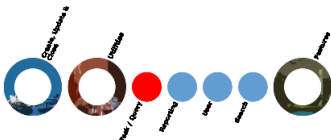
ATTACH FILES

Attach file:

Choose File


No file chosen

Task / Query – Ad Hoc Communication





Therefore

Reference:	Priority:	Select Task
510	Normal	Review Task
Strategy name:		Progress Status
xxxx xxxx xxxx xxxx xxxx ...		Update Task
Strategy details:		Sub Activity
xxxx xxxx xxxx xxxx xxxx xxxx xxxx		Reassign Task
x xxxx xxxx xxxxxxxx xxxx xxxx xxxx x		Record Note
xx xxxx xxxx xxxx xxxx xxxxxxxx xxxx		Send Email
xxxx xxxx xxxx xxxx xxxx xxxx xxxx x		Add Comment
x xxxxxxx xxxx xxxx xxxx xxxx xxxx x		Set Reminder
xx xxxx xxxx xxxxxxxx xxxx xxxx xxxx		Flag Task
xxxx xxxx xxxx xxxx xxxx xxxx xxxxxxx		Change Log
xxxx xxxx xxxx xxxx xxxx xxxx xxxx xx		Reclassify
x xxxx xxxxxxxx xxxx xxxx xxxx xx [More...]		
Classification:		
Call Centre		
Strategy		
Opened:	2018/07/17 10:09	
Last updated:	2018/07/17 10:10	
Goal:	2018/07/31 08:00	
Created by:	Peter Lever	
Allocated to:	Peter Lever	
Reference:	Priority:	Select Task
512	Normal	Review Task
Strategy name:		Update Task

Send an Email

Instructions

You can send an ad-hoc email that relates to any task or query that is allocated to you. The ad-hoc email functionality allows you to send an ad-hoc email to parties to whom the associated task or query is of interest and to keep record of all ad-hoc emails sent via the "Task / Query Review" screen.

Ad-hoc email communication is visible to all Users who have access to the task or query under question, via its "Task / Query Review" screen.

Please record the email addresses of the intended recipients to the "Recipient Details" field, capture the email's subject to the "Subject" field, capture the body of your email to the "Email Message" box and then click the "Send" button. Please note that it is not necessary to capture a salutation (e.g. "Dear John Smith" or "Dear Sir / Madam") or a close (e.g. "Regards, John Smith") to the "Email Message" box as the system will automatically populate the salutation and close at the point in time that the ad-hoc email is sent.

When capturing recipients for an ad-hoc email, please take note of the following:

1. As a default, ad-hoc emails are addressed "Dear Sir / Madam". Should you wish an email to be addressed using the recipient's name, for example, "Dear John Smith", follow the recipient's email address by his or her name in brackets, for example: - "john@somewhere.com (John Smith)".
2. If you would like to send an ad-hoc email to multiple recipients, please separate their email addresses by a semicolon (;), for example: - "john@somewhere.com (John Smith); mary@somewhere.com (Mary Jones)".

If you would like to attach a file to your ad-hoc email, please use the "Attach file" functionality.

When using the search mechanism, please take note of the following:

1. The search mechanism requires that you capture at least three characters to the search line.
2. Once you have captured a search string that is three or more characters in length, the system will automatically initiate a search and present you with the results of the search.
3. You can use any number of search strings when searching for a record. Search strings must be separated by spaces. The records that are returned will be those that comply with all search strings.
4. Click on a record returned by the search mechanism to select it.
5. Once you have selected a record, you can make modifications to the data that has been inserted.

Task / Query – Context Sensitive Help





Therefore

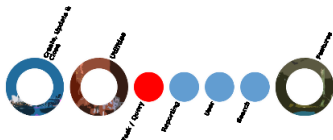
Reference:	Priority:	Select Task
510	Normal	Review Task
Strategy name:		Progress Status
xxxx xxxx xxxx xxxx xxx ...		Update Task
Strategy details:		Sub Activity
xxxx xxxx xxxx xxxx xxxx xxxx xxx x xxxx xxxx xxxxxxxx xxxx xxxx xxxx x xx xxxx xxxx xxxx xxxx xxxxxxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxx x xxxxxxxx xxxx xxxx xxxx xxxx xxxx x xx xxxx xxxx xxxxxxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxxxxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxx x xxxx xxxxxxxx xxxx xxxx xxx [More...]		Reassign Task
Classification:		Record Note
Call Centre		Send Email
Strategy		Add Comment
Opened:	2018/07/17 10:09	Set Reminder
Last updated:	2018/07/17 10:10	Unflag Task
Goal:	2018/07/31 08:00	Change Log
Created by:		Reclassify
Peter Lever		
Allocated to:		
Peter Lever		
Reference:	Priority:	Select Task
512	Normal	Review Task
Strategy name:		Update Task

Change Log

Instructions

Icon	DATE	TIME	DETAIL
	2018/07/17	10:09	TASK CREATED Task created by Peter Lever.
	2018/07/17	10:09	DEFINE STRATEGY ENTRY CREATED Define Strategy Entry created by Peter Lever.
	2018/07/17	10:10	EXECUTE STRATEGY ENTRY CREATED Execute Strategy Entry created by Peter Lever.
	2018/07/17	10:12	TACTIC SUB ACTIVITY CREATED Tactic Sub Activity (Reference: 511) created for this task by Peter Lever.
	2019/10/03	10:38	PROGRESS STATUS UPDATED / IMPROVED PROGRESS STATUS Progress Status for this task updated to 25% by Peter Lever. Progress Status improved by 25%. <div><div></div></div>
	2019/10/03	10:38	NOTE RECORDED Note added to this task by Peter Lever.
	2019/10/03	10:49	NOTE RECORDED Note added to this task by Peter Lever.
	2019/10/03	10:49	TASK RECLASSIFIED Task reclassified by Peter Lever.

Task / Query – Change Log





Therefore

My Availability Status

Current Status: In Office

Click to change your availability status to "Out of Office".



My Areas of Responsibility

My Tasks

Click to access Tasks that are currently allocated to you.



Tasks I Created

Click to access Tasks that you created.



My Team's Tasks

Click to access Subordinate Tasks that meet your Management Visibility settings.



My Team's Progress Status Updates

Click to access Tasks for which your Subordinates need to update Progress Statuses.



My Flagged Tasks

Click to access Tasks that you have flagged.



Comment Log

Click to access tasks with Comments logged by you that have not been fully reviewed.



Welcome to the Dashboard

My Availability Status

The "My Availability Status" option provides you with the ability to manage your Availability Status by allowing you to mark yourself as being "in office" or "out of office".

Please note that should you be on record as being "out of office", you will be excluded from the flow of Tasks and Queries until such a time that you again mark yourself as being "in office".

My Responsibility

The "My Responsibility" option provides detail of the activities or issues that require action or issues of which you should be familiar with.

Quick Link buttons provide you with a direct link to the Therefore StratIQ screens that you need to utilise to action your areas of responsibility.

It is imperative that you action all items which you are responsible for as rapidly as possible.

Performance

The "Performance" option provides you with detail of your personal performance with respect to the resolution of Tasks and Queries as well as that of your Company, Team and Department.

DISABLED AND OUT OF OFFICE USERS ...



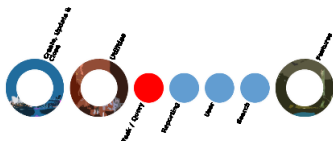
Please note that where Users are listed under the "Performance" option, disabled Users can be identified by their names being bracketed with square brackets. For example, should the User "Joe Soap" be disabled, his name will be displayed as "[Joe Soap]". The absence of square brackets indicates that the User has not been disabled.

The names of Users who are Out of Office are coloured red. Users whose names are not coloured red are on record as being "In Office".

Contact List


The "Contact List" option is intended to facilitate your interaction with other Users of the Therefore StratIQ System. It provides you with access to contact details for all Users that belong to Companies with whom you are entitled to interact. Please be advised that the Users in question must also have elected to share their contact details before they will become visible on the Contact List.

Task / Query – Task Flagging





Therefore

Reference:	Priority:	Select Task
510	Normal	Review Task
Strategy name:		Progress Status
xxxx xxxx xxxx xxxx xxxx xxx ...		Update Task
Strategy details:		Sub Activity
xxxx xxxx xxxx xxxx xxxx xxxx xxx		Reassign Task
x xxxx xxxx xxxxxxxx xxxx xxxx xxxx x		Record Note
xx xxxx xxxx xxxx xxxx xxxxxxxx xxxx		Send Email
xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxx		Add Comment
x xxxxxxxx xxxx xxxx xxxx xxxx xxxx x		Set Reminder
xx xxxx xxxx xxxx xxxxxxxx xxxx xxxx xxxx		Unflag Task
xxxx xxxx xxxx xxxx xxxx xxxx xxxxxxxx		Change Log
xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxx		Reclassify
x xxxx xxxxxxxx xxxx xxxx xxxx xx [More...]		
Classification:		
Call Centre		
Strategy		
Opened:	2018/07/17 10:09	
Last updated:	2018/07/17 10:10	
Goal:	2018/07/31 08:00	
Created by:		
Peter Lever		
Allocated to:		
Peter Lever		
Reference:	Priority:	Select Task
512	Normal	Review Task
Strategy name:		Update Task

Update Progress Status

Instructions

PROGRESS STATUS PERCENTAGE:

Minimum value: 0% | Maximum value: 100%

42% complete

PROGRESS STATUS UPDATE DETAILS

File Edit View Insert Format Table

Paragraph B I

ATTACH FILES

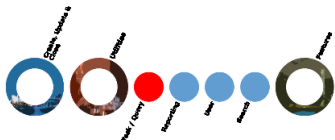
Attach file: Choose File No file chosen

Attach file: Choose File No file chosen

Cancel

Update

Task / Query – Progress Status Updates





Therefore

Reports Options Help

Tasks]

QUERY REFERENCE NUMBER 535 HAS A SIMILAR FOUNDING DOCUMENT (DOCUMENT TYPE: Document Type 1 | DOCUMENT NUMBER: xxxxxx | STATUS: OPEN).

QUERY REFERENCE NUMBER 536 HAS A SIMILAR FOUNDING DOCUMENT (DOCUMENT TYPE: Document Type 1 | DOCUMENT NUMBER: xxxxxx | STATUS: OPEN).

INSTRUCTIONS

Capture the salient details below and click either the **SELF** (to allocate the query to yourself) or **NON-SELF** button (to allocate the query to someone other than yourself).

Document Type:

Document Number:

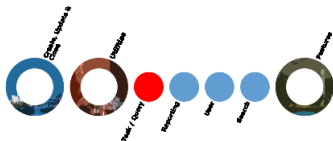
Short description:

Details:

File Edit View Insert Format Table

↶ ↷ Paragraph ▼ **B** *I* ≡ ≡ ≡ ≡ ≡ ≡

Task / Query – Duplicate Checker








Therefore

Therefore BPMS Reporting Utilities




Task / Query

-  Comments
-  Notes
-  Reminders
-  Reassignment
-  Reclassification
-  Attachments
-  Rich text editor
-  Sub activities
-  Ad-hoc communication
-  Context sensitive help
-  Change log
-  Task flagging
-  Progress status updates
-  Duplicate checker



Reporting

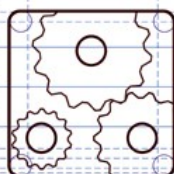
-  Dashboard
-  Reporting
-  External data cube feed

User

-  User self-service
-  Management visibility
-  Contact list

Search

-  Smart search
-  Quick search



Therefore

[My Responsibility] [Performance] [Disabled List]

OPEN TASKS THAT I NEED TO PROCESS / MANAGE

Description					Total
My Tasks	0	1	0	0	1
Tasks I Created	0	1	0	0	2
My Team's Tasks	0	0	0	0	1
My Team's PSUs ★	0	0	0	0	1
My Flagged Tasks	0	0	0	0	1

MY DEPARTMENT'S OPEN TASKS BY CLASSIFICATION

Classification					Total
Information Technology:	0	0	0	0	1
Strategy execution:	0	0	0	0	1
Tactic	0	0	0	0	1
Total	0	0	0	0	1

MY DEPARTMENT'S OPEN TASKS BY USER

User					Total
Peter Lever	0	1	0	0	1
Total	0	1	0	0	1

OPEN THEREFORE STRATIQ TASKS BY THREAD TYPE

Thread Type					Total
Strategy	0	1	0	0	1
Tactic	0	0	0	0	1
Total	0	1	0	0	2

Welcome to the Dashboard

My Availability Status

The "My Availability Status" option provides you with the ability to manage your Availability Status by allowing you to mark yourself as being "out of office".

Please note that should you be on record as being "out of office", you will be excluded from the flow of Tasks and Queries until such time as you mark yourself as being "in office".

My Responsibility

The "My Responsibility" option provides detail of the activities or issues that require action or issues of which you should be familiar with.

Quick Link buttons provide you with a direct link to the Therefore StratIQ screens that you need to utilise to action your areas of responsibility.

It is imperative that you action all items which you are responsible for as rapidly as possible.

Performance

The "Performance" option provides you with detail of your personal performance with respect to the resolution of Tasks and Queries by your Team and Department.

DISABLED AND OUT OF OFFICE USERS ...

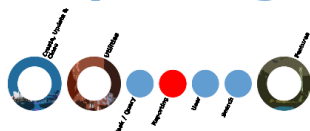


Please note that where Users are listed under the "Performance" option, disabled Users can be identified by their names being displayed in brackets. For example, should the User "Joe Soap" be disabled, his name will be displayed as "[Joe Soap]". The absence of brackets indicates the User has not been disabled.

The names of Users who are Out of Office are coloured red. Users whose names are not coloured red are on record as being available.

Contact List

Reporting – Dashboard





Therefore

Main Menu



Favourited Reports

Click to access reports that you have favourited.



Popular Reports

Click to access this system's most popular reports.



Recent Reports

Click to access reports that you have recently run.



All Reports

Click to access a complete report listing.



Age Analysis Family

Click to access the "Age analysis" family of reports.



Annual Pricing Log Family

Click to access the "Annual Pricing Log" family of reports.



Average Age Of Open Tasks Family

Click to access the "Average age of open tasks" family of reports.



Average Age On Close - By Classification Family

Click to access the "Average age on close - by



Welcome to Reports

Favourited Reports

To access a listing of reports that you have previously "Favourited" click the ♥ report menu icon.

Reports can be marked as favourites by clicking the "favourite star" found on the "Report Viewer" screen. A solid blue star (as per the image below) indicates that the report under question has been favourited, whereas a "hollow" star indicates that the report has not been favourited.

Report list

Age analysis - by client

Number of rows: 14

★ Age analysis - by client

Company No.▼	Company Name ▼
11	Gauteng Province

Popular Reports

To access a listing of reports that are commonly run by Users of this portal, click the ⚙ report menu icon.

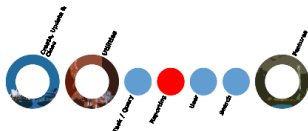
Recent Reports

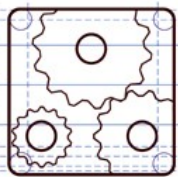
To access a listing of reports that you have recently run, click the ⌚ report menu icon.

All Reports

To access a complete listing of reports that are available to you, click the 🏠 report menu icon.

Reporting – Reporting Menu





Therefore

Report list

Tasks opened / closed count - LM by day

Number of rows: 19

Run!

Report Description

Run this report for a count of tasks opened and closed last calendar month by day.

Report Type

Summary

Report Family

Tasks opened / closed count

Report Notes

Days which zero (0) tasks were opened or closed will not be listed. The abbreviation "LM" refers to "Last Month".

Report Disclaimer

The information contained in this report is for the exclusive use of authorized recipient(s) and may be confidential, proprietary, and / or legally privileged. Inadvertent disclosure of this report does not constitute a waiver of any privilege. If you have received this report in error, please do not directly or indirectly use, print, copy, forward, or disclose any part of this report. Please also delete this report and all copies and notify the source. Thank you.

★ Tasks opened / closed count - last month by day

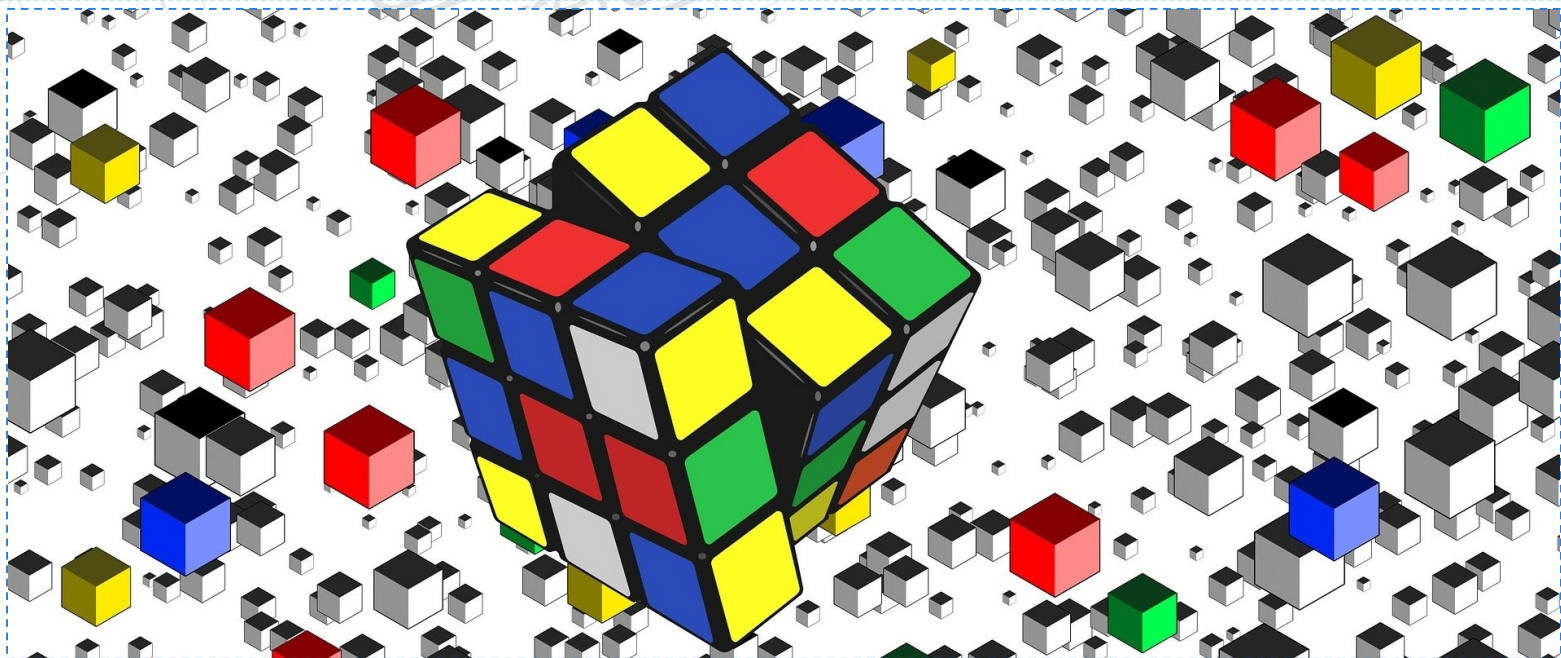
✓	Date	Opened Count	Closed Count	⋮
✓	2017-12-01	6	7	
✓	2017-12-02	1	0	
✓	2017-12-04	13	7	
✓	2017-12-05	8	12	
✓	2017-12-06	3	2	

Reporting – Report Viewer

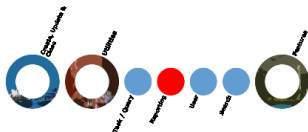




Therefore



Reporting – External Data Cube Feed





Therefore

Therefore BPMS User Utilities

Task / Query

- Comments
- Notes
- Reminders
- Reassignment
- Reclassification
- Attachments
- Rich text editor
- Sub activities
- Ad-hoc communication
- Context sensitive help
- Change log
- Task flagging
- Progress status updates
- Duplicate checker

Reporting

- Dashboard
- Reporting
- External data cube feed

User

- User self-service
- Management visibility
- Contact list

Search

- Smart search
- Quick search



Therefore

Personal Administration

My Contact Details

Use this functionality to manage your personal Contact Details.

My Communication Types

Use this functionality to manage your Communication Types and User Options.

My Password

Use this functionality to change your Password.

Sharing My Contact Details

Use this functionality to manage the visibility of your Contact Details.

My Shared Notes

Use this functionality to capture notes that you would like to make visible via the Contact List.

My Management Visibility

Use this functionality to define your visibility of your Subordinates' tasks and queries.



My Contact Details

Show Disabled: No

Instructions

MANAGE DATA

Direct telephone:

27117946685

Direct fax:

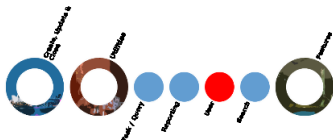
27865028957

Mobile:

27834474883

Save

User – User Self Service





Therefore

Personal Administration

My Contact Details

Use this functionality to manage your personal Contact Details.

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Use this functionality to manage the visibility of your Contact Details.

My Shared Notes

Use this functionality to capture notes that you would like to make visible via the Contact List.

My Management Visibility

Use this functionality to define your visibility of your Subordinates' tasks and queries.



My Management Visibility

Show Disabled: No

Instructions

MANAGE DATA

MY TEAM'S TASKS FILTER

First Line Subordinates:

Second Line Subordinates:

Department Head Subordinates:

Status				
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

TASKS MY TEAM CREATED FILTER

First Line Subordinates:

Second Line Subordinates:

Department Head Subordinates:

Status				
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

TASK WATCH FILTER

First Line Subordinates:

Second Line Subordinates:

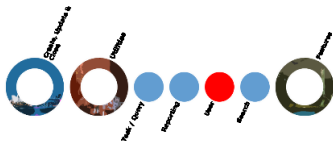
Department Head Subordinates:

Status				
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Reset to Default

Save

User – Management Visibility





Therefore

SEARCH TEXT



Clear Search

USER LISTING

Chris Bester

Point of Presence: .: Client POP 1 :.

Availability: **In Office**



Harry Houdini

Point of Presence: .: Client POP 1 :.

Availability: **In Office**



Honest Eddie

Point of Presence: .: Client POP 1 :.

Availability: **In Office**



Peter Lever

Point of Presence: Therefore Solutions

Availability: **In Office**



Contact Details

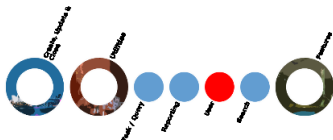
General Detail

Full Name: Peter Lever
Point of Presence: Therefore Solutions
Department: Information Technology
Job Title: System Administrator
Direct telephone: 27117946685
Direct fax: 27865028957
Mobile: 27834474883
Email: peter@therefore.co.za
Availability: **In Office**

Office Detail

Switchboard: 27117946684
Primary fax: 27865028957
Physical address: 4 Megiddo
Puttick Avenue
Sundowner Ext 28
2188
Gauteng
Map Link: [Click here](#)
Postal address: PO Box 2471
Northwold
2155
Gauteng

User – Contact List





Therefore

Therefore BPMS Search Utilities

Task / Query



Comments



Notes



Reminders



Reassignment



Reclassification



Attachments



Rich text editor



Sub activities



Ad-hoc communication



Context sensitive help



Change log



Task flagging



Progress status updates



Duplicate checker

Reporting



Dashboard



Reporting



External data cube feed

User



User self-service



Management visibility



Contact list

Search



Smart search



Quick search



open
with peter

Clear Search

Reference: Priority:

510	Normal
-----	--------

Strategy name:

xxx xxx xxx xxx xxx xx ..

Strategy details:

[illegible]

Classification:

Call Centre

Strategy

Opened: 2018/07/17 10:00

Last updated: 2018/07/17
10:10

Goal:	2018/07/31 08:00
-------	---------------------



Select Task

Review Task

Progress Status

Update Task

Sub Activity

Reassign Task

Record Note

[Send Email](#)[Add Comment](#)[Set Reminder](#)

Unflag Task

Change Log

Reclassify

Smart Search

The Therefore StratIQ System's "Smart Search" functionality enables you to perform a complex search for tasks and queries on the basis of a host of variables, referred to as "Keywords".

If you wish to search for Therefore StratQ tasks and queries on the basis of their Reference Numbers, capture the required Reference Numbers separated by spaces. It is not necessary to make use of a Keyword when performing a Reference Number search.

When searching on the basis of anything other than a Reference Number, it is necessary to use Keywords. It is important that each new line is started with a Keyword. Keywords must be followed by a space and then by a search string. Please note that Keywords may only be used once when searching.

Keywords

The Smart Search Keywords are listed below. For additional detail, click the Smart Search Keyword's name.

for

class

DEPARTMENT

The "department" Keyword allows you to search on the basis of the task or query's Classification Department.

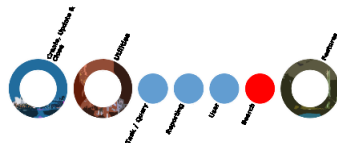
Should you, for example, wish your search to return all tasks and queries that carry a Department level Classification of "Credit Control", you would capture the following search line to the Smart Search box:

department credit control

Please note that you are able to part-search on a Classification Department without the use of wildcards. For example, you could capture the following search line to the Smart Search box:

department credit

Search – Smart Search





Therefore

Dashboard Tasks Comments Reminders Progress Statuses Search Reports Options Help

[Smart Search] [Quick Search Results]

Reference: 510
Priority: Normal

Strategy name:

xxxx xxxx xxxx xxxx xxx ...

Strategy details:

xxxx xxxx xxxx xxxx xxxx xxxx xxxx
x xxxx xxxx xxxx xxxx xxxx xxxx x
xx xxxx xxxx xxxx xxxx xxxxxxxx
xxxx xxxx xxxx xxxx xxxx xxxx xxxx
x xxxxxxxx xxxx xxxx xxxx xxxx x
xx xxxx xxxx xxxxxxxx xxxx xxxx
xxxx xxxx xxxx xxxx xxxx xxxx xxxxxxxx
xxxx xxxx xxxx xxxx xxxx xxxx xxxx
x xxxx xxxxxxxx xxxx xxxx xxx [More...]

Classification:

Call Centre

Strategy

Opened: 2018/07/17 10:09

Last updated: 2018/07/17 10:10

Goal: 2018/07/31 08:00

Created by:

Peter Lever

Allocated to:

Peter Lever

Review Task

Progress Status

Update Task

Sub Activity

Reassign Task

Record Note

Send Email

Add Comment

Set Reminder

Unflag Task

Change Log

Reclassify



Overview

GENERAL

Status: Open
Reference: 510
Sub Activity: **511 (Open)**
Priority: Normal
Strategy name: xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx
Classification: Marketing Strategy

CLASSIFICATION CHANGES ...



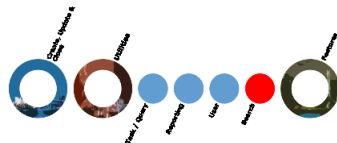
During the course of this task, changes have been made to its Classification. The current Classification is detailed above. For detail of previous Classifications, please review the Classification detail provided at the Entry level.

PERFORMANCE

Date opened: 2018/07/17 10:09
Last update: 2018/07/17 10:10
Task completion goal: 2018/07/31 08:00
Time since creation: 443 days 1 hours 11 minutes
Time overdue: 429 days 3 hours 21 minutes
Percentage of time used: 3186%

TASK CREATED BY

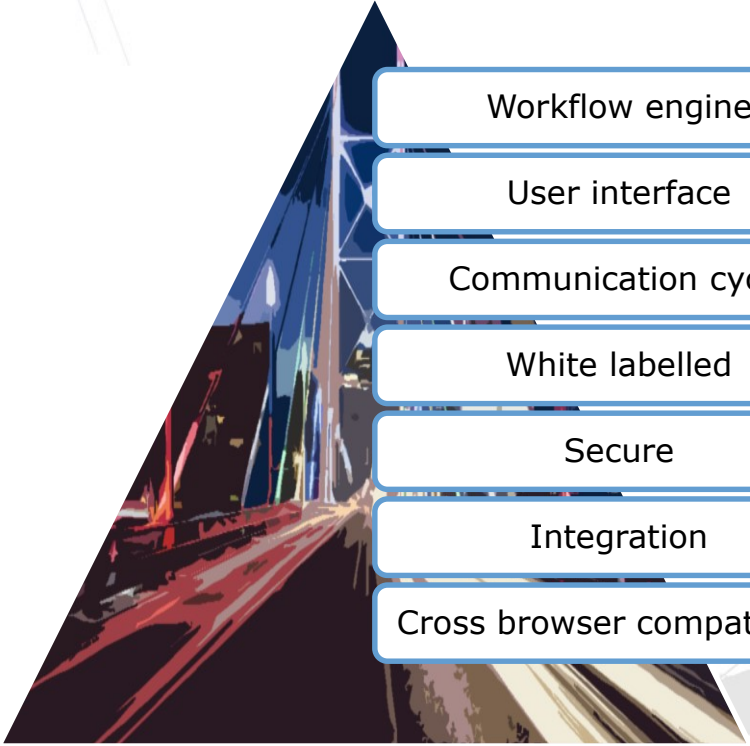
Search – Quick Search





Therefore

Therefore BPMS Features



Workflow engine

User interface

Communication cycle

White labelled

Secure

Integration

Cross browser compatibility



Therefore

Therefore ThreadBuilder® | © 2019 Therefore Strategic Technology Services (Pty) Ltd | Version 4.0.7204.33617

Thread Type: **Strategy [37]**
Entry Type: **Define Strategy [91]**

Details | Classification | Instructions | Buttons | Owner | Notice | Watch | Reassign | Sub Activities | Email Cycle | Progress

Entry Type ID: 91
Entry Type Name: Define Strategy

Short Description: Req'd Strategy name: ☐ No Spaces
Long Description: Req'd Strategy details: ☐ No Spaces
Short Text: Hide
Priority: Req'd Priority:
Date / Time: Req'd Due date / time:
Attachment 1: Edit Invoice:
Attachment 2: Edit POD:
Attachment 3: Edit Delivery note:
Attachment 4: Edit Statement:
Attachment 5: Edit Specification:

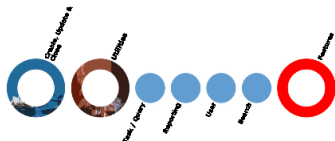
☒ Display Proxy ☒ Display Founding Doc. ☒ Display Company

Save

Workflow Tree:

- [37] Strategy
 - [91] Define Strategy
 - [96] Execute Strategy
 - [102] Review
 - [103] Rework
 - [104] Open items
 - [120] Terminate
 - [126] Reopen
- [38] Tactic
- [39] Project
- [40] Task
- [41] Activity
- [42] Issues
- [45] Risks
- [46] Info Request

Features – Workflow Engine





Therefore

Site Setup

Primary Company

Use this functionality to manage the Primary Company, setup communication media and detail the System Administrator.

Status Colours

Use this functionality to manage the allocation of performance colours to tasks and queries.

Management Visibility Defaults

Use this functionality to define this system's Management Visibility defaults.

Current Performance Calculation

Use this functionality to manage the calculation of Performance Hours.

Password Rules

Use this functionality to manage this system's Password Rules.

Activate Optional Features

Use this functionality to activate or deactivate optional features.

Active Menu Items

Use this functionality to define this system's Active Menu Items.

Communication Types

Use this functionality to configure communication media, options and types.



Activate Optional Features

Show Disabled: No

Instructions

MANAGE DATA

CONTACT LIST CONFIGURATION

Enable Contact List:

- ☒ Disable Contact List for opted out Users:
- ☒ Enable Reporting Structure on Contact List:
- ☐ Enable Company on Contact List Summary:
- ☒ Enable POP on Contact List Summary:

MANAGERS, POP AND DEPARTMENT HEADS CONFIGURATION

- ☐ Add Primary Co. Users to Managers:
- ☐ Add Primary Co. Users to Department Head:
- ☐ Add Primary Co. Users to Point of Presence Head:

TASK / QUERY UTILITY CONFIGURATION

TASK / QUERY SELECT

- ☒ Enable the use of Select:

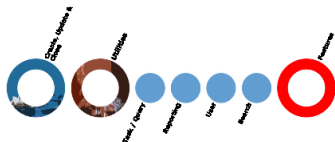
BASE DATA

- ☐ Enable the use of Base Data:

NOTES

- ☒ Enable the use of Notes:

Features – User Interface / Functionality on Demand

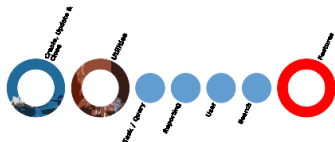




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Features – Communication Cycle

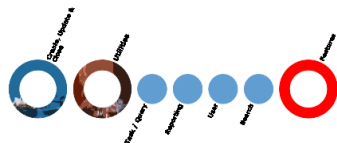


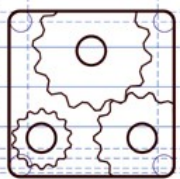


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Features – White Labelled

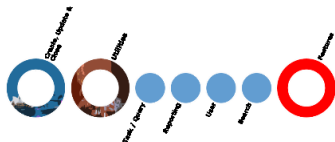




Therefore



Features – Secure

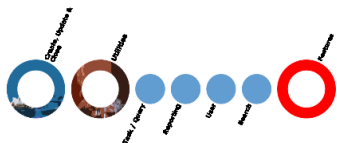


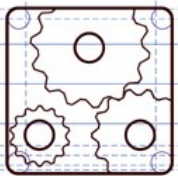


Therefore



Features – Integration

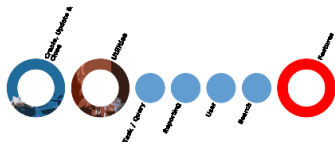


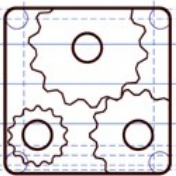


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Features – Cross Browser Compatibility





Therefore

Therefore BPMS

More info 



Building Bridges

Supercharging delivery

Peter Lever | +27 83 447 4883 | peter@therefore.co.za



Therefore

More Info Index ...



Therefore Quantum™



Therefore StratIQ™



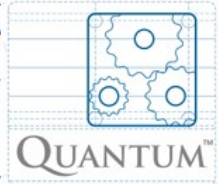
Therefore HelpDesk™



Therefore FieldTask™



Therefore Company



Therefore Quantum™ Menu

More info 



Quantum Presentation



Quantum Brochure



Utilities & Features Presentation



Quantum Website



Therefore StratIQ™ Menu

More info 



StratIQ Presentation



StratIQ Brochure



Utilities & Features Presentation



StratIQ Website



Therefore HelpDesk™ Menu

More info 



HelpDesk Presentation



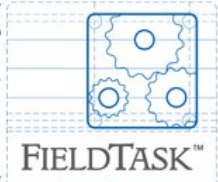
HelpDesk Brochure



Utilities & Features Presentation



HelpDesk Website



Therefore FieldTask™ Menu

More info 



FieldTask Presentation



FieldTask Brochure



Utilities & Features Presentation



FieldTask Website



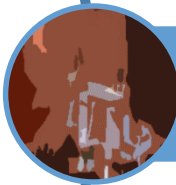
Therefore

More info 

Therefore Company Menu



Therefore Presentation



Therefore Brochure



Therefore Website