Import Demo - Processes & Tasks

In this video we will walk through the creation of a process and the execution of that process and distributing tasks to data providers to input information in their respective and corresponding data collection sections and fields. We are currently taking a look at a dashboard for the data provider entry tasks that would have been created by an ESG core team member and or data reviewer. To create a process we would simply navigate to our plus round icon on the left hand pane and then navigate to process, selecting that would open up a new sub tab which would allow us to not only title that new process creation and I'll sample here emissions data entry as an example but then also be able to specify what files or spreadsheets and corresponding sections would be assigned to specific users for that data entry. This would be done here by an action with the guidance being that tasks is the optimal way to manage the data collection process for that data capture. Now, since we have already set up a sample process titled here data provider entry tasks we currently have two outline tasks that we specified - one that has been completed and is ready for approval and will see this here in our dashboard where 50% has now been done and ready for review and approval and there is still an outstanding task that has been sent out but has not yet been initiated or completed. We can add an additional task by saying add action, selecting the task, titling the information which could be inclusive of updating values in employee data, selecting an assignee, selecting an approver, selecting that file name, the due date and then on instruction description for that content an email notification would be sent out once all this has been selected and assigned with the action added to this process since we already have these currently assigned we'll quickly showcase what an email notification looks like - would receive a message that says please complete this task, the outline due date, the instructions, who would be approving this data entry and the location of where this section would be. If we select the go to task this will open a new window and as we navigate to that section in that window it would take us directly to the section of that field which is outlined as emissions input and as you can notice this section is also an input mode, therefore we would only be able to carry out the data entry and those fields that have been designated with this blue highlighting. We would then proceed to input that data and I'll just, from a sample perspective, bring over the adjacent values for the data here to capture this relevant information. So here I'm just happening to input some of that data. These would actually just be specific values - I do like these numbers here so I'll do 3 6 9 and 12 - do something similar across the other fields. There is commentary as well to provide some insights into the variants or the changes between these two time periods, there are optional, but can be inputted as well since we do have the comment fields to relate this and then, once these actions are complete we'll see that there is a check mark on our right hand pane, it highlights the tasks for the entering of the emissions data that is due on March 11. I'll go to the task which will also relay those same instructions who would be the approver and assignee and then I would select complete that I've inputted that information. Once this has been completed, We'll actually notice that within the dashboard, there is now 100% of the tasks that are ready for approval. I've completed a task that's been assigned, but I can also ensure to approve the completion of another task. With this, I'll go actually back to my tasks pane, which did highlight my other task. Let's go back here, which is the approving portion of this task. So as being listed as an approver the other individual has contributed to the values I'll select approve, now the task workflow has been complete. As we would also see this reflected in our central dashboard. Those that have been approved had already been inputted, and those that have been completed have also gone through approval. In a prior walkthrough we highlighted that after approval, that core data reviewer or ESG core team member would then also update the outgoing connection. I would then do this by navigating to connections on the right hand pane, selecting the emissions file connection and selecting to refresh that connection.This will then push that data to the central table, which is a central table that collects data across all the different data collections that allow us to consume this data later on in the ESG reporting process.Once that update is complete, we'll get a green check mark followed by the timestamp of the latest data refresh.