

Assignee/State Workflow

The assignee of a task is the person who is responsible for the task at the point it is at currently. While there are several states that a task can be at, there is only (in all reality) one person who is responsible for moving that task out of where it currently is.

The state of a task is the part of the process that the task is currently in. See the Initial Customization chapter for more details on its setup.

Examples

Function needs to be coded

BRAD is coding this function - ASSIGNEE: BRAD, STATE: WIP

This task is assigned to BRAD. That means that BRAD is currently (or presently going to be) writing the code to accomplish X. Now, maybe BRAD is in charge of writing the code, but his manager needs to verify that his code works. That's fine. However, as long as BRAD is working on the code, it will be assigned to BRAD. As soon as that code is ready to be reviewed, we move on to a different state.

BRAD is done coding this function - ASSIGNEE: BRAD's Manager, STATE: REVIEW

When BRAD is done coding up and testing this function, he moves this to "Review", and assigns this task to his manager. This means that it's time for his manager to review this function. At this point, his manager may move this task back into WIP if he thinks it needs more work, and reassign it to BRAD, or move it into DONE if this task is done to his satisfaction, and is production-ready.

Sales copy needs to be written

KEVIN is writing the sales copy - ASSIGNEE: KEVIN, STATE: WIP

Kevin needs to write a sales copy. He sits down at his desk and pounds out a good letter that he thinks will inspire his readers to buy his company's product.

KEVIN's Manager Reviews his Sales Copy - ASSIGNEE: KEVIN's Manager, STATE: REVIEW

At this point, Kevin's Manager reviews the copy that Kevin has written. However, he doesn't think that the sales copy is good enough to produce and send to outside sources. So he makes corrective notes for KEVIN to fix before he sends it out. These notes are put in the Task's comments; the tasks is re-assigned to KEVIN, and put back into WIP/Planned.

KEVIN re-writes the Sales Copy - ASSIGNEE: KEVIN, STATE: WIP

KEVIN goes back and makes the changes based on his Manager's review.

KEVIN's Manager Approves his Sales Copy - Assignee: Kevin's Manager, STATE: REVIEW

The task is in review again, but this time KEVIN's manager approves his sales copy. At this point he passes it off to whatever process is after the writing and review stage, which is outside of his control. However, he is the ultimate source of review of the sales copy that proceeds from his department.

Revision #2

Created 25 July 2020 22:39:55 by andrewcz

Updated 3 December 2020 05:26:44 by andrewcz