

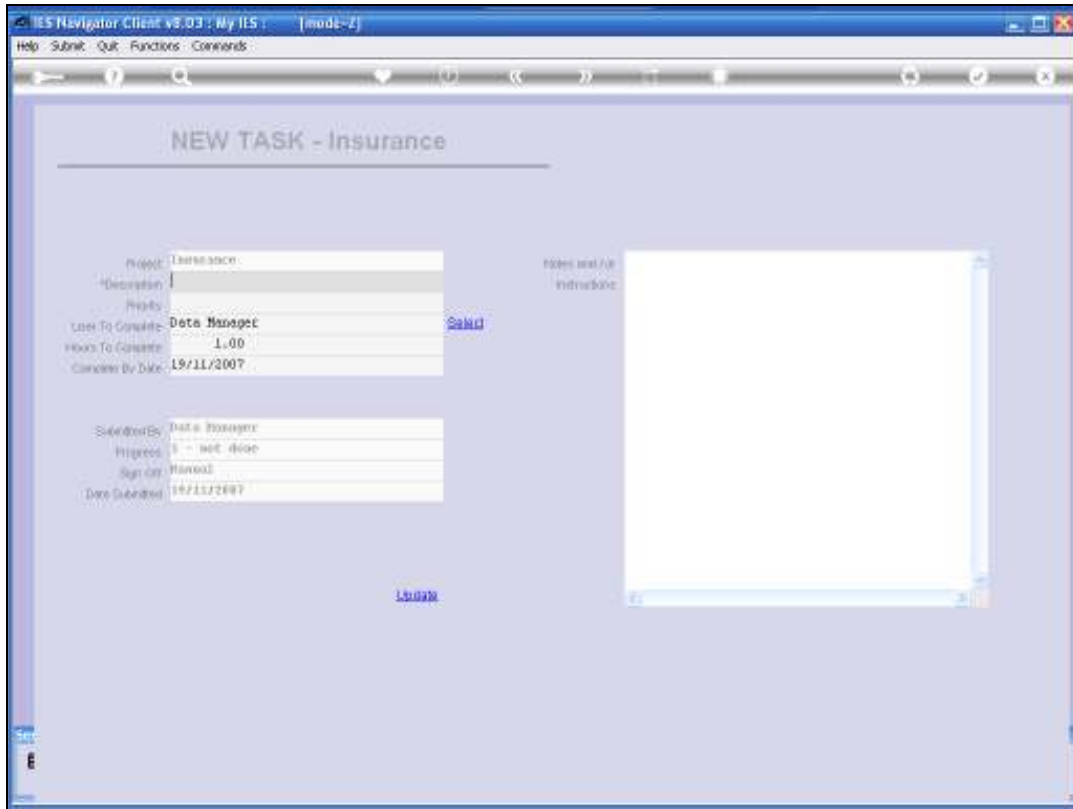
Slide 1

Each User has a Task Profile among the User's Business Profiles. The Task Profile determines whether you or I function at User, Supervisor or Executive level.

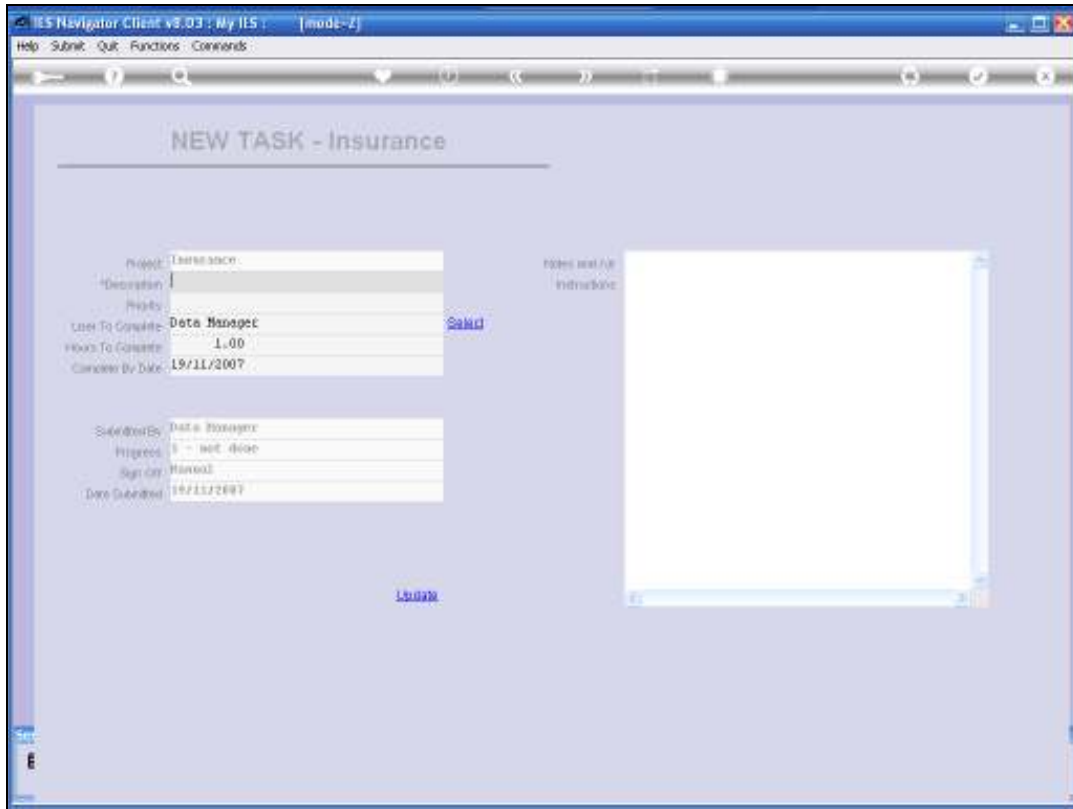
That impacts on who can Assign a task to him or herself, but one needs to be a Supervisor or an Executive to be able to assign to some other Users and also to see the tasks of other Users and to work with them.

But we can Submit a New Task, Flagged for Insurance, not necessarily for any specific Customer Account, but we can indicate that in the Instructions or the Description.

So we can Submit a New Task directly form the Insurance Brokerage Main Screen, by choosing "Submit New Task"



Slide 2



Slide 3

The screenshot shows a web browser window titled 'IES Navigator Client vs.03 : My IIS : [mode-z]'. The main content area is titled 'NEW TASK - Insurance'. The form contains the following fields:

Description	This is an Insurance Task
Priority	1
User To Complete	Data Manager Save
Hours To Complete	1.00
Complete By Date	19/11/2007
Assigned By	Data Manager
Progress	0 - Not done
Sign Off	Manual
Date Submitted	19/11/2007

There is a 'Save' button next to the 'User To Complete' field and a 'Submit' button at the bottom center of the form. A large empty text area for 'Notes and/or Instructions' is on the right side.

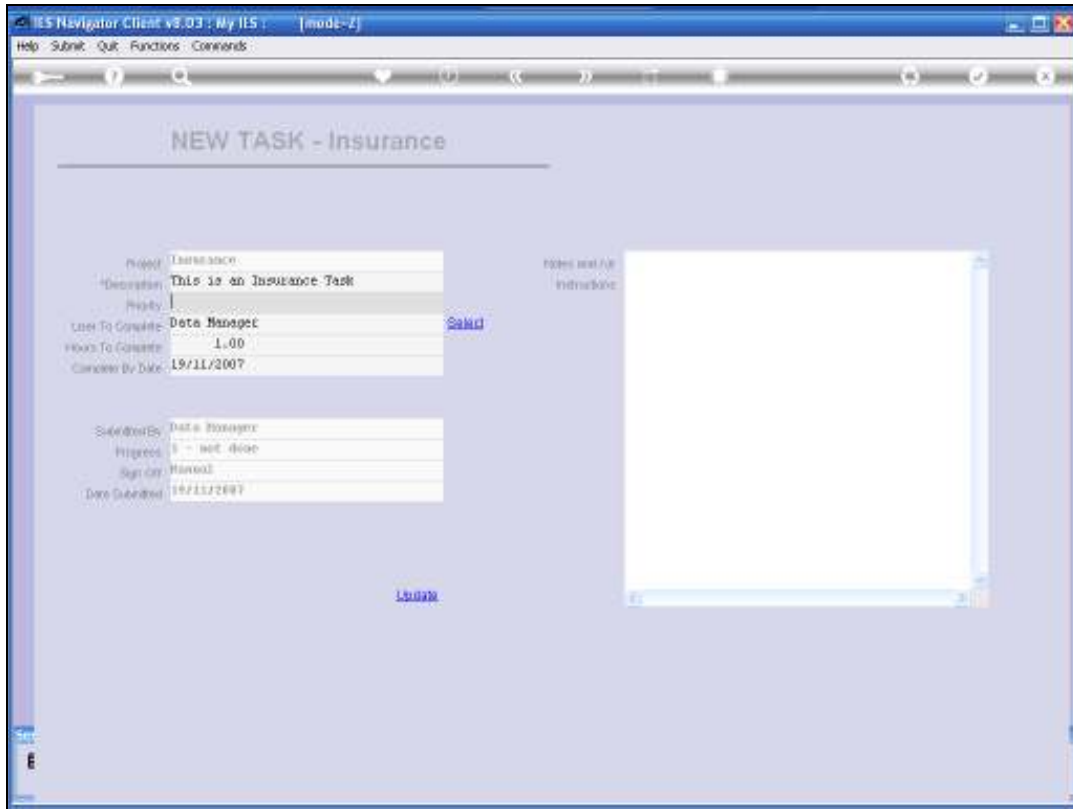
Slide 4

Each Task must have a Description and must have a priority selected.

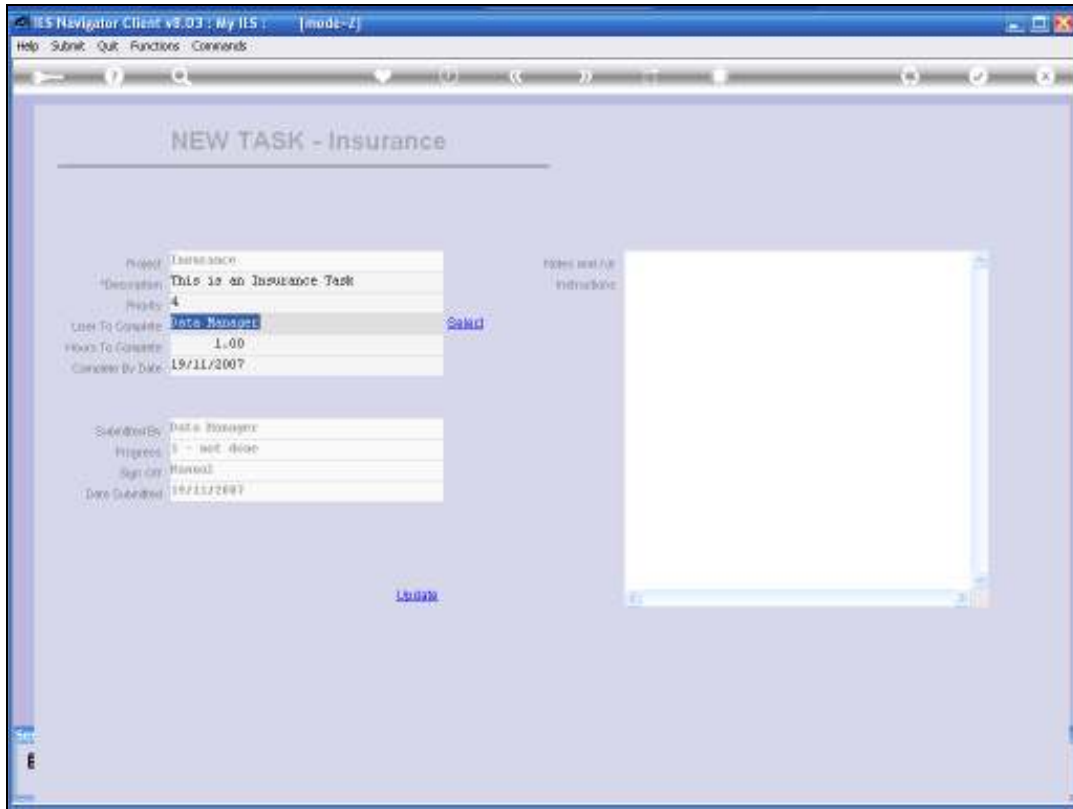
Beyond that, the other detail are all optional because once we have a Description and a Priority, we can actually "Save" or "Submit" the Task.

However we can detail further instructions. We can also Assign a different User to complete it.

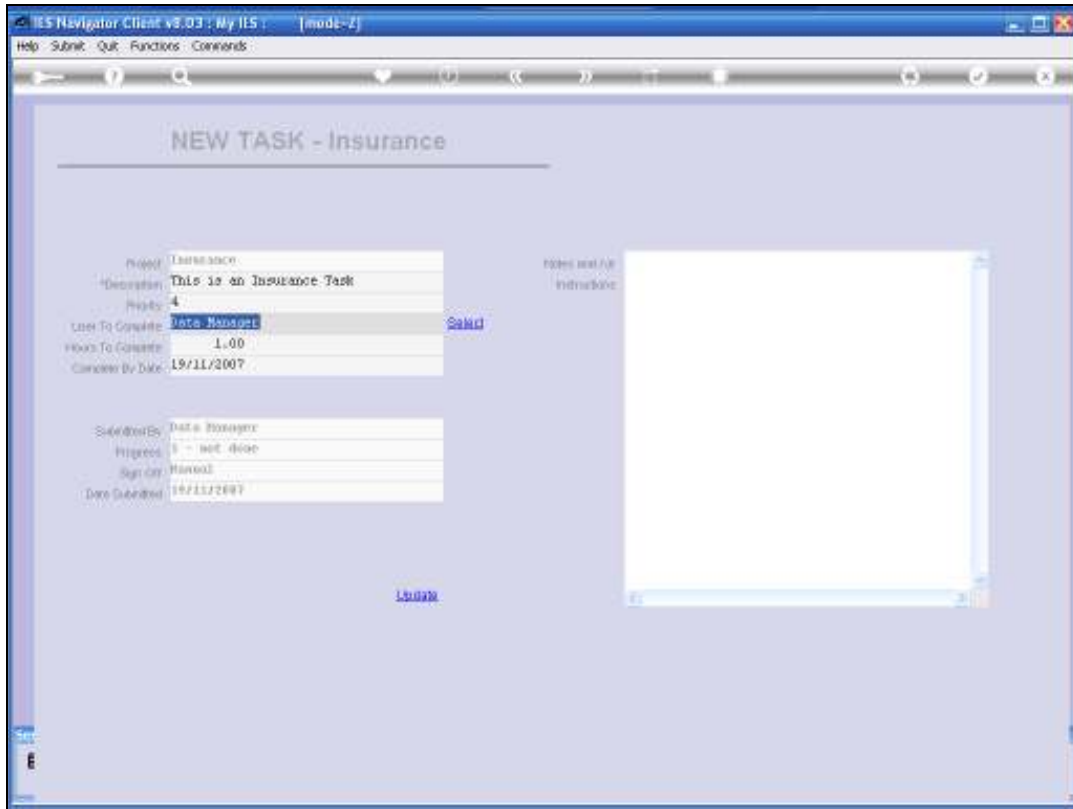
We can change the estimated time that is required for the Task to be completed and also the "Complete By Date" can be changed.



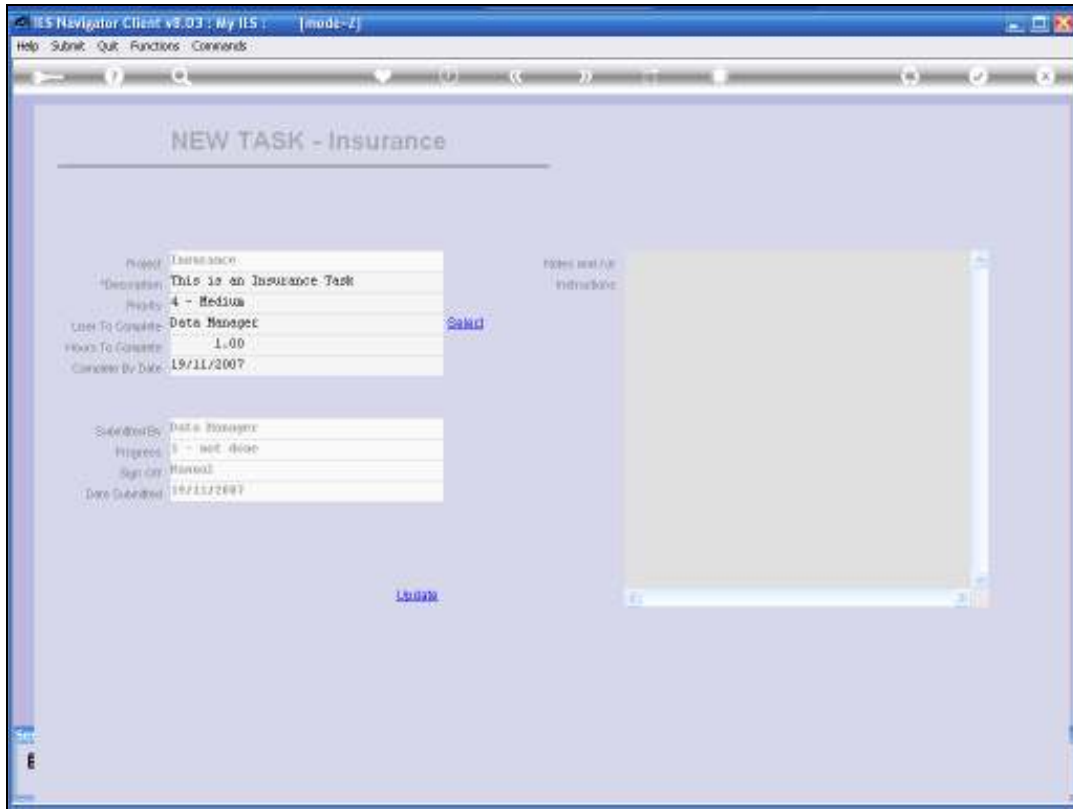
Slide 5



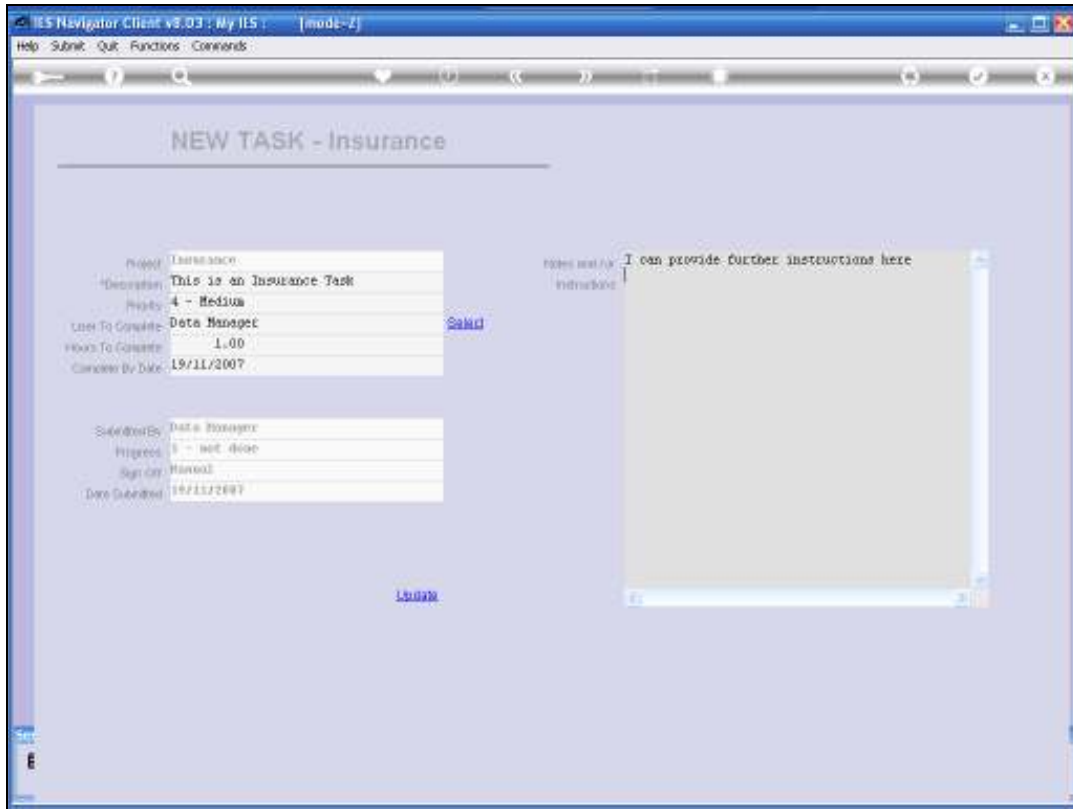
Slide 6



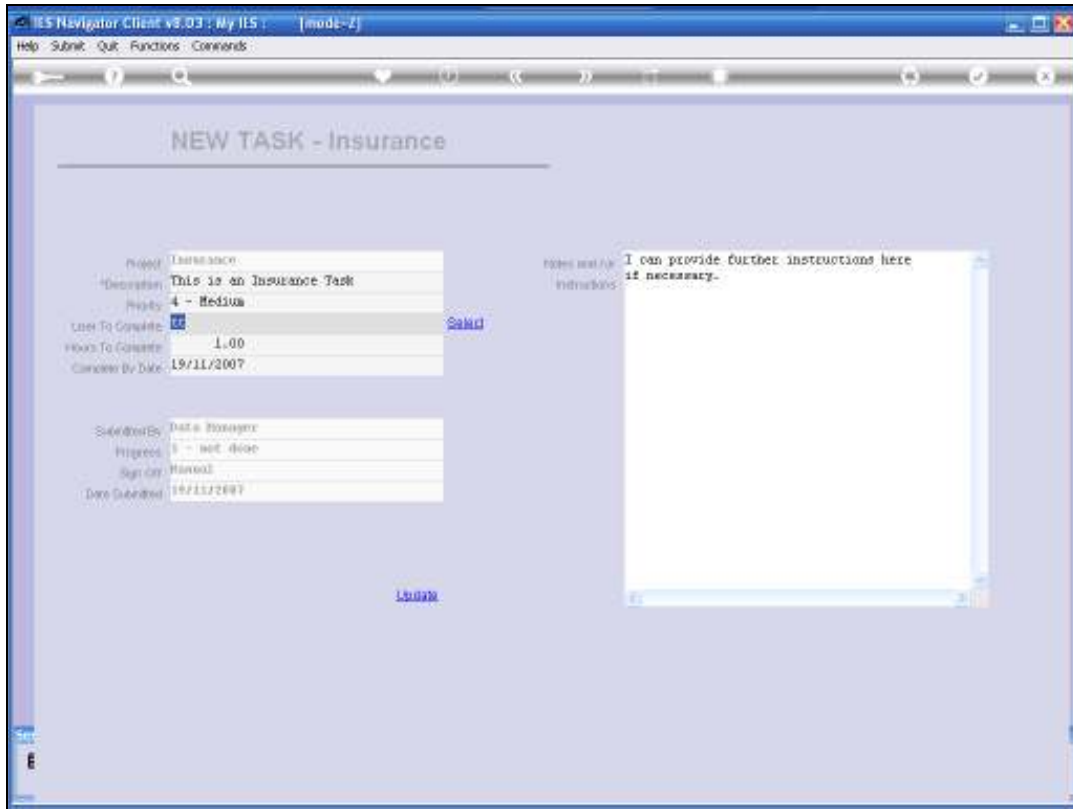
Slide 7



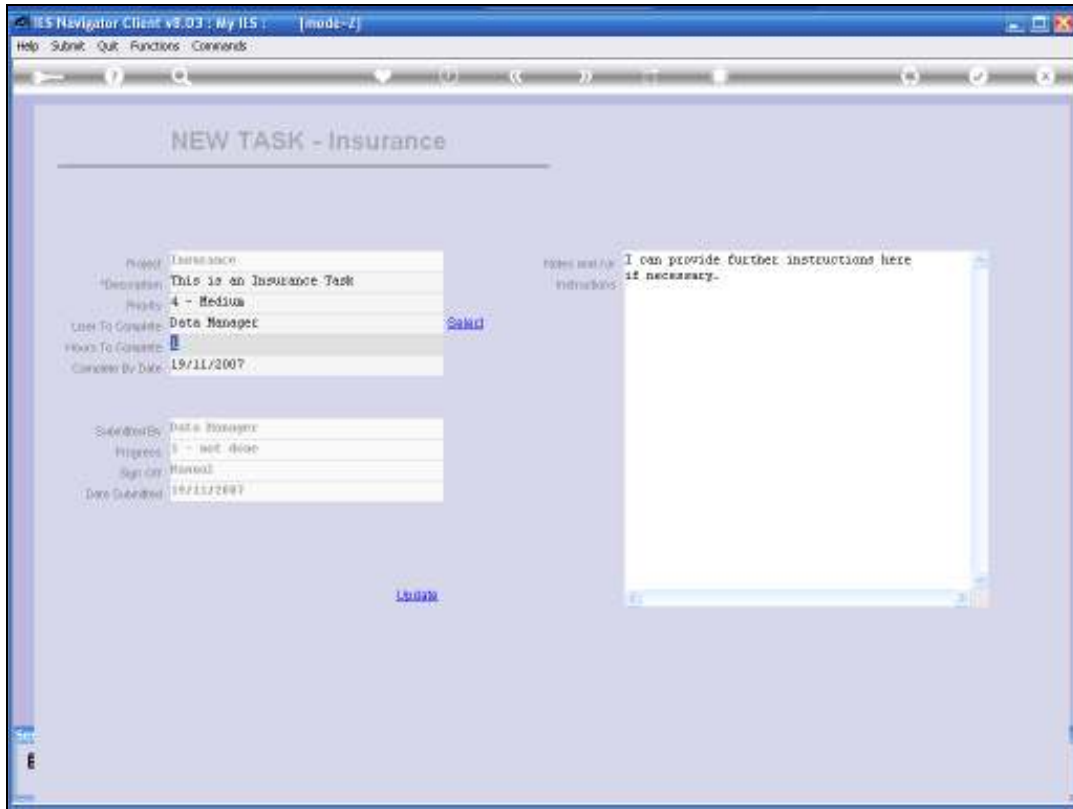
Slide 8



Slide 9



Slide 10



Slide 11

The screenshot shows a web browser window titled "IES Navigator Client v8.03 : My IIS : [mode-Z]". The browser's address bar is empty, and the main content area displays a form titled "NEW TASK - Insurance".

The form is divided into two main sections. The left section contains several input fields:

- Project:** Data Storage
- Description:** This is an Insurance Task
- Priority:** 4 - Medium
- User To Complete:** Data Manager (with a "Select" button to the right)
- Hours To Complete:** 1.00
- Complete By Date:** 19/11/2005

The right section is a text area for instructions:

- Notes and/or Instructions:** I can provide further instructions here if necessary.

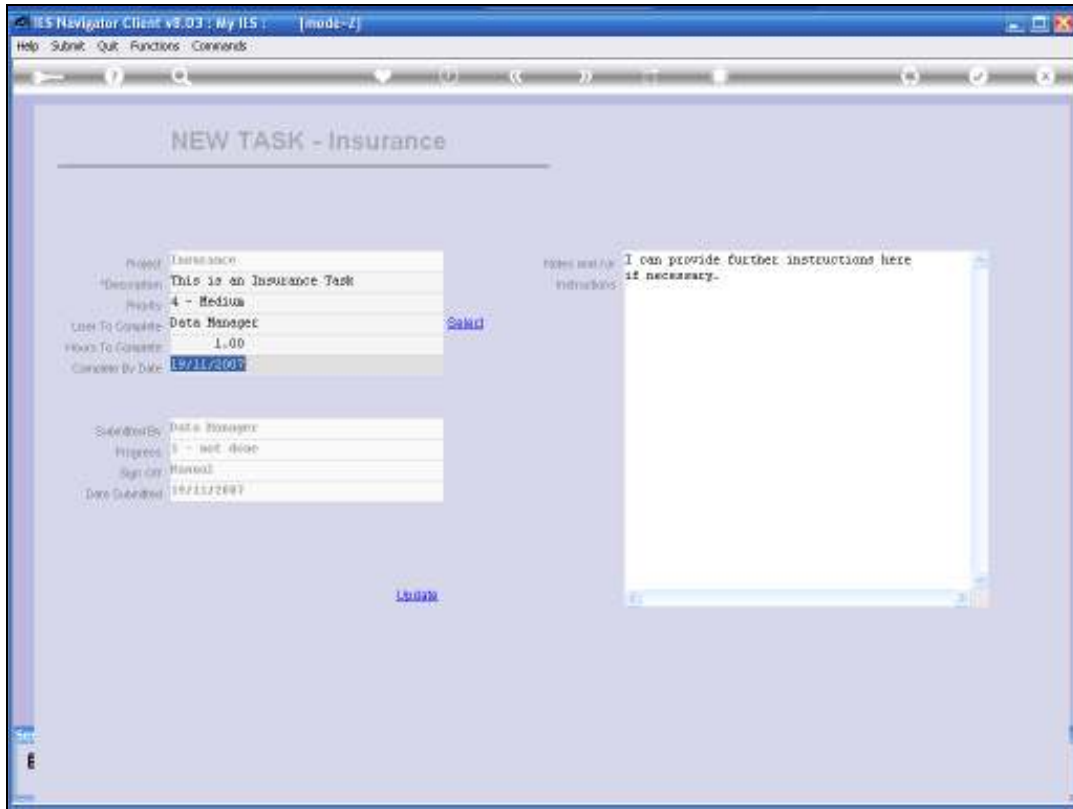
Below these sections, there are additional fields:

- Submitted By:** Data Storage
- Progress:** 0 - Not Done
- Sign Off:** Manual
- Date Submitted:** 19/11/2005

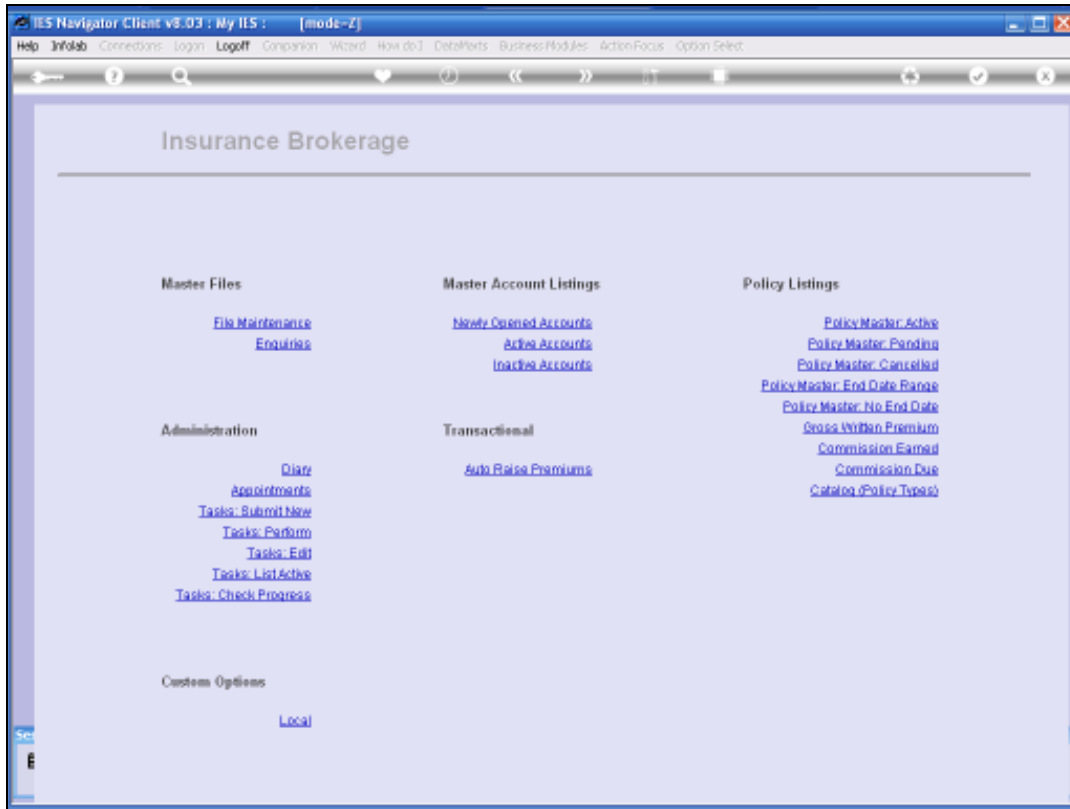
At the bottom center of the form, there is a "Submit" button.

Slide 12

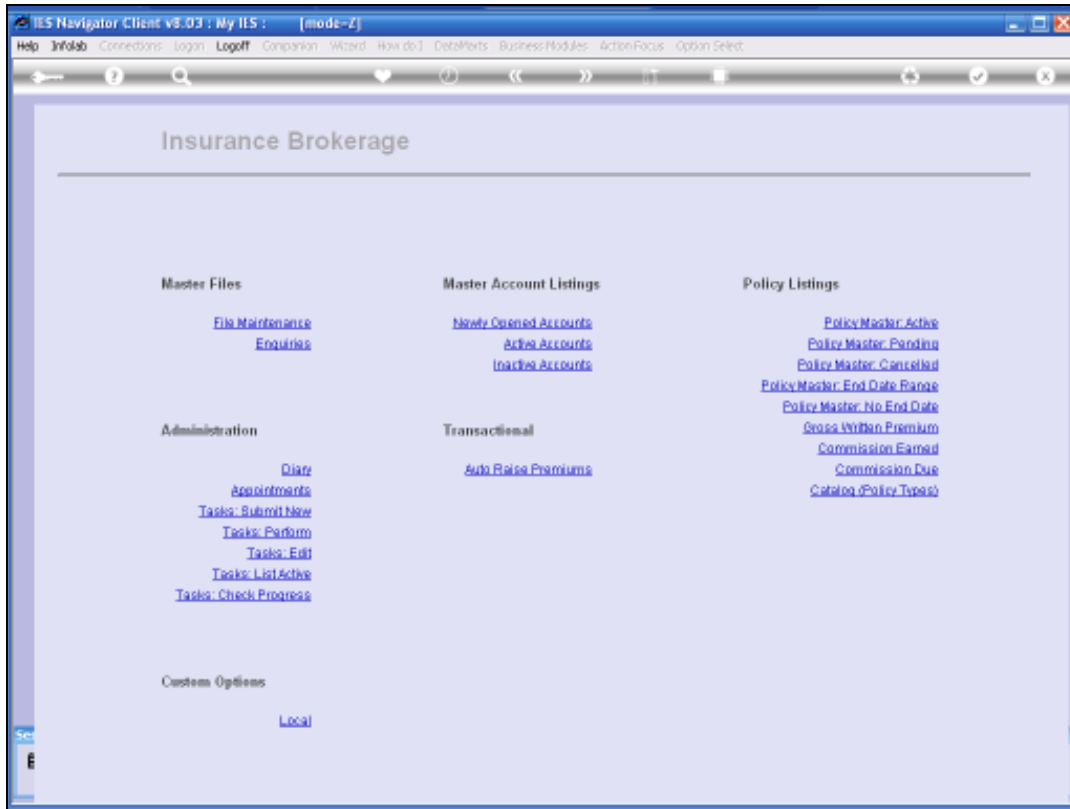
When we have specified what we want to specify, we can simply choose "Update" to Submit the New Task.



Slide 13



Slide 14



Slide 15