



INTERNATIONAL  
**TREASURY  
SERVICES**

**TASK TRACKER V.2**

**CLIENT ADMINSTRATOR**

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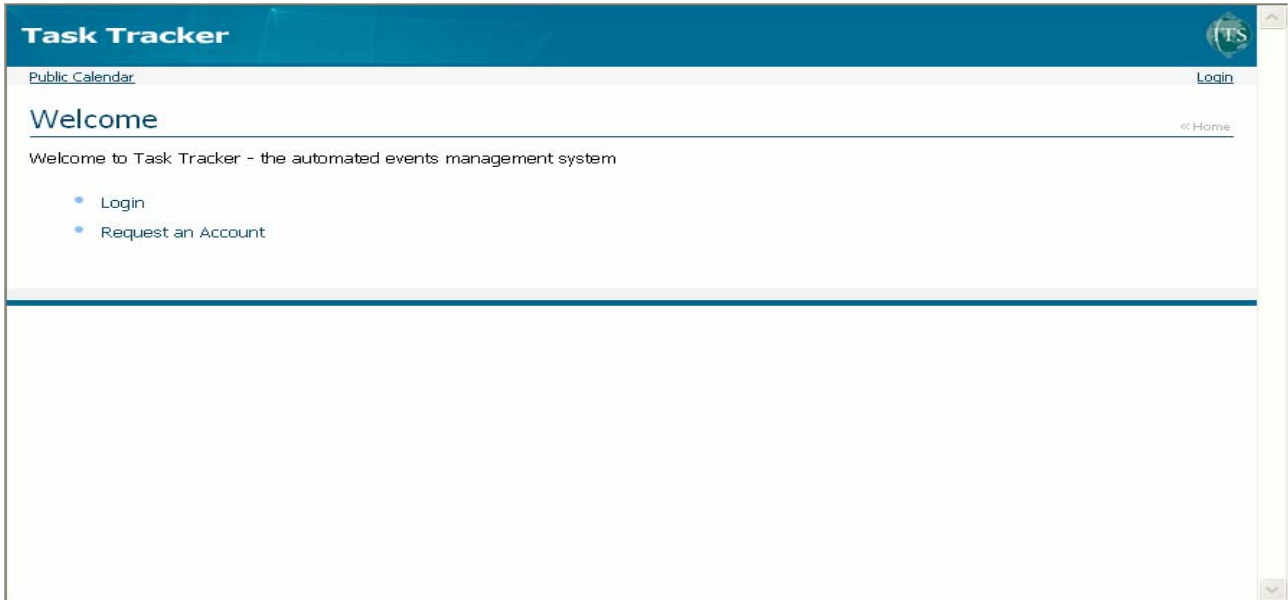
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## Getting Started

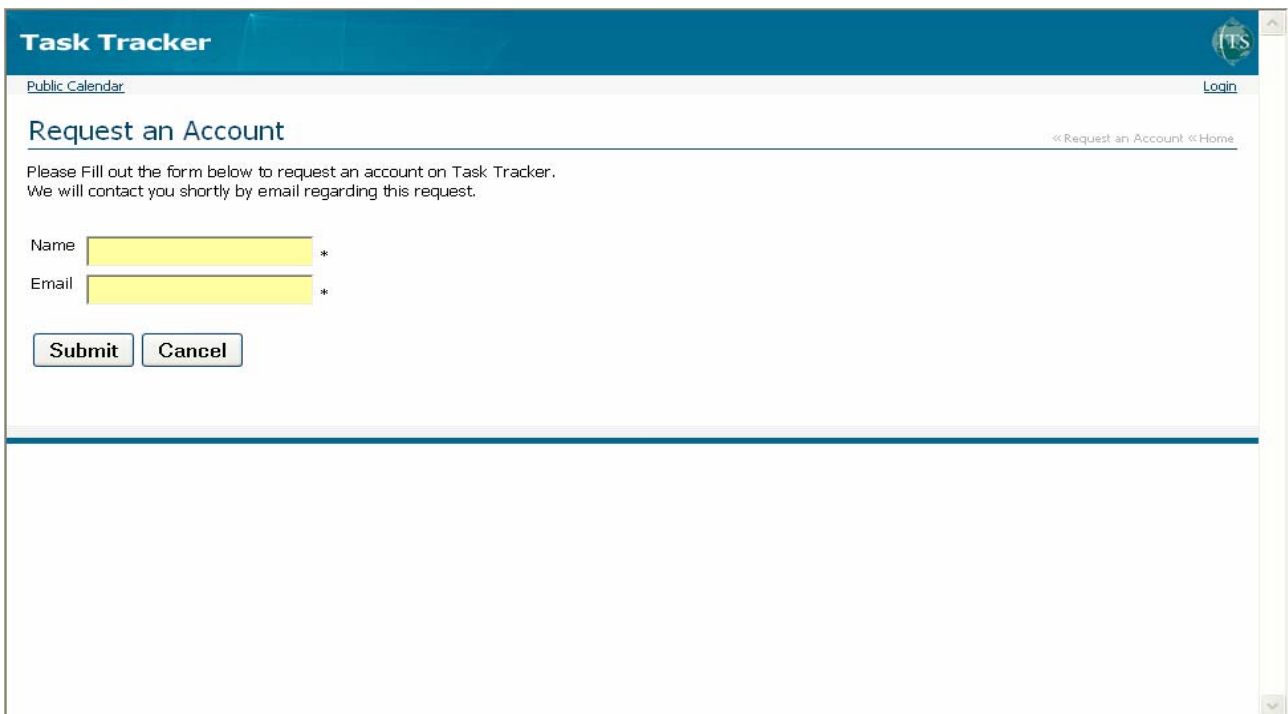
### Request an Account

You would need to obtain the web address as provided by your site administrator to access the Task Tracker interface. Click on Request an Account



The screenshot shows the 'Task Tracker' web interface. At the top, there is a blue header with the 'Task Tracker' logo and a 'Public Calendar' link. Below the header, the page displays a 'Welcome' message: 'Welcome to Task Tracker - the automated events management system'. A navigation menu includes 'Login' and 'Request an Account'. A 'Home' link is also visible in the top right corner.

Fill in the form. Your administrator will access your request and forward to you a password upon successful registration.



The screenshot shows the 'Task Tracker' web interface with the 'Request an Account' form. The header is identical to the previous screenshot. The main content area contains the following text: 'Please Fill out the form below to request an account on Task Tracker. We will contact you shortly by email regarding this request.' Below this text are two input fields: 'Name' and 'Email', both marked with an asterisk (\*). At the bottom of the form are two buttons: 'Submit' and 'Cancel'.



## Login

Upon receiving the email confirmation, please login using the details from the forwarded email.

Task Tracker

Public Calendar Login

### Login

Welcome to Task Tracker - the automated events management system  
Please login to the Task Tracker below.

Email  \*

Password  \*

If you have forgotten your password you can [Reset your Password](#).  
If you do not have an account you may [Request an Account](#).

Your email address will be reflected on the top right side of the browser and the default page will show the My Events and My Sub-Tasks.

Task Tracker hlau@itresury.net Logout

My Home | Events and Tasks | Calendar

### Events and Tasks

[Show Only My Events](#) [Show Only Public Events](#)

#### My Events

Show events starting in:

[Next 10 Days](#) [11-30 Days](#) [More then 30 days](#) [Show only Completed Events](#) [Show only Prospects](#) [Show all](#)

Client	Course	Start Date	End Date	Booking Date	Status
DB L&D SIN	Financial Maths	28-04-2006	28-04-2006	27-02-2006	Booked
IBBM	Derivatives Accou...	26-06-2006	27-06-2006	20-02-2006	Booked

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#### My Sub-Tasks

Show tasks due within:

[Next 3 days](#) [3-10 Days](#) [11-30 days](#) [over 30 days](#) [Show Completed Tasks](#) [Unknown Due Date](#) [Overdue upto 14 days](#) [Overdue over 14 days](#) [Show all](#)

Event Start	Client	Event	Due Date	Days to Go	Assigned User	Description	Status	
28-04-2006	DB L&D SIN	Financial Maths	23-04-2006	46	Henry Lau	send course mater...	✗	Mark Complete
26-06-2006	IBBM	Derivatives Accou...	21-06-2006	105	Henry Lau	send course mater...	✗	Mark Complete

Page: 1

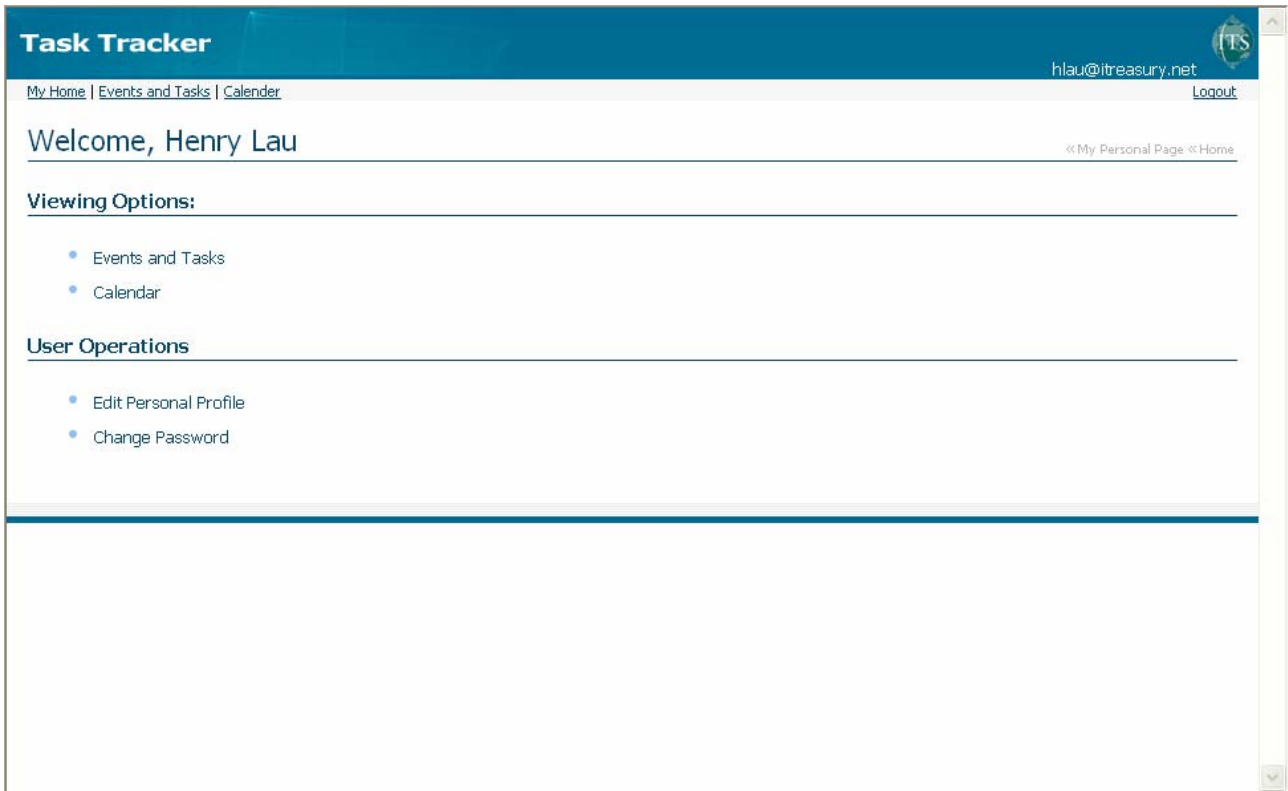


## Changing Personal Profile

Click on My Home

To change your personal particulars, click on Edit Personal Profile

To change your password, click on Change Password

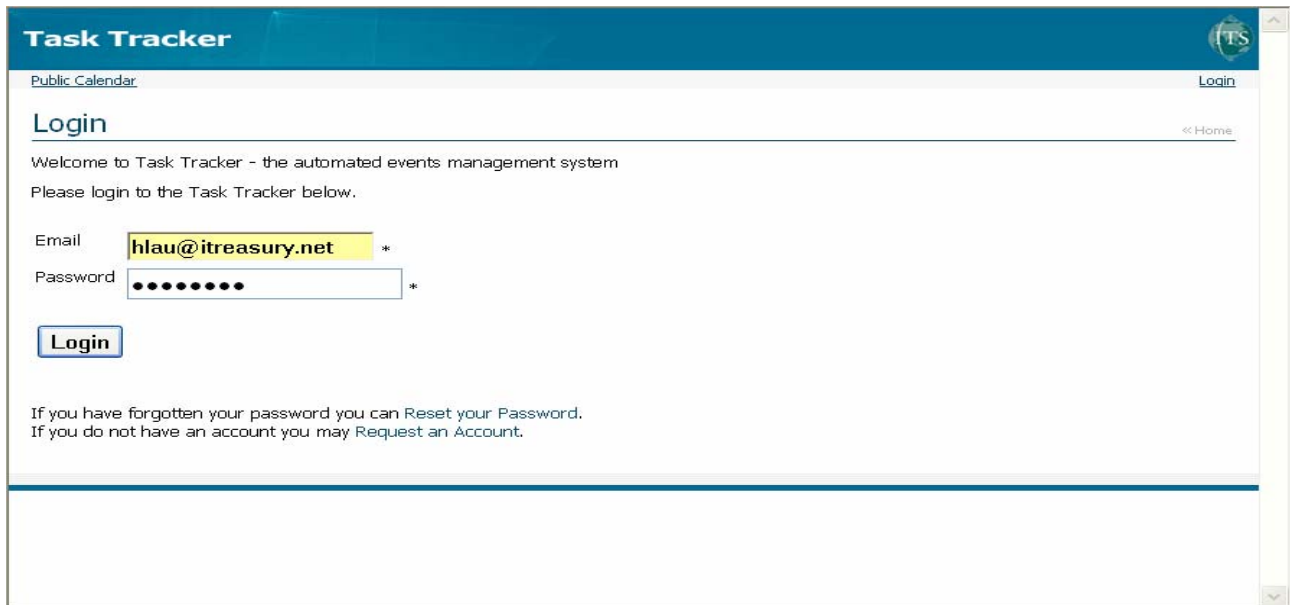


The screenshot shows a web application interface with a blue header bar. The header contains the text "Task Tracker" on the left, the email address "hlau@itresury.net" on the right, and a small circular logo with "ITS" inside. Below the header is a navigation bar with links for "My Home", "Events and Tasks", and "Calendar", and a "Logout" link on the far right. The main content area is white and features a "Welcome, Henry Lau" message. Below the welcome message, there are two sections: "Viewing Options:" and "User Operations:". The "Viewing Options:" section contains two bullet points: "Events and Tasks" and "Calendar". The "User Operations:" section contains two bullet points: "Edit Personal Profile" and "Change Password". The interface is clean and professional, with a clear layout and easy-to-read text.



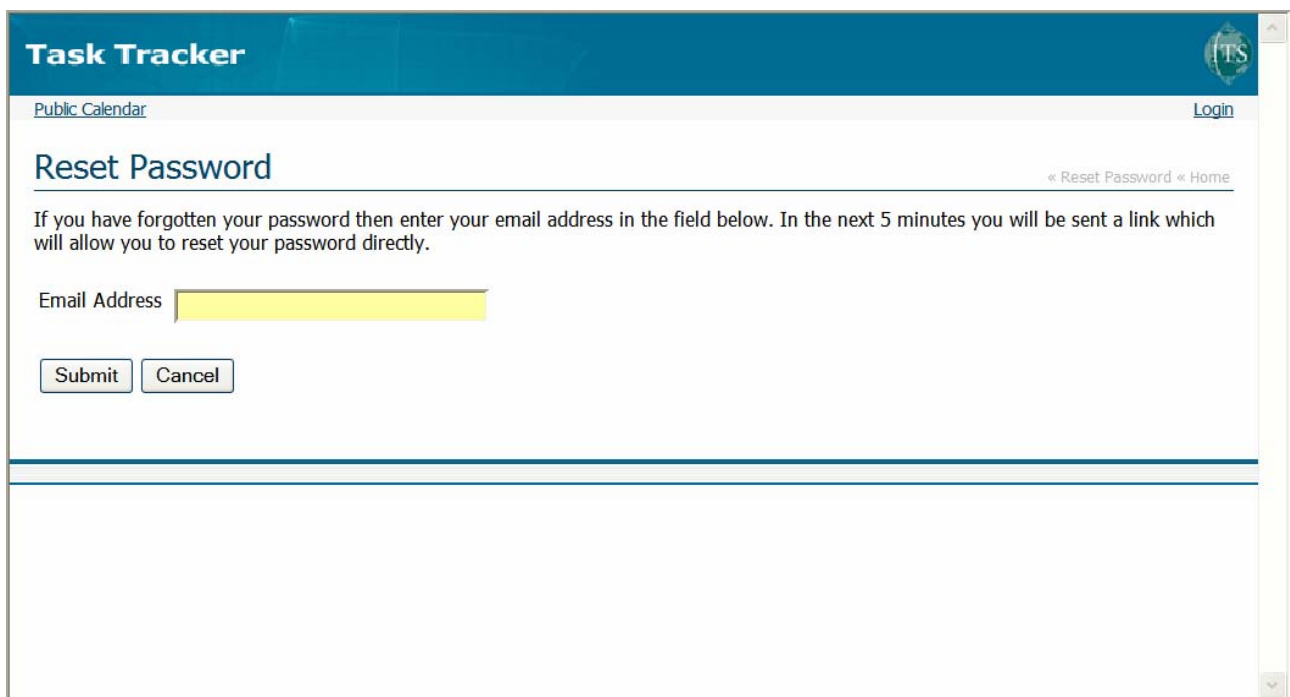
## Reset Password

The reset password feature is found at the login page



The screenshot shows the 'Task Tracker' login page. At the top, there is a blue header with the 'Task Tracker' logo and a 'Public Calendar' link. Below the header, the page title is 'Login'. The main content area contains a welcome message: 'Welcome to Task Tracker - the automated events management system. Please login to the Task Tracker below.' There are two input fields: 'Email' with the value 'hlau@itresury.net' and 'Password' with masked characters. A 'Login' button is positioned below the fields. At the bottom, there are links for 'Reset your Password' and 'Request an Account'.

Input your login email address and click on submit.



The screenshot shows the 'Task Tracker' 'Reset Password' page. The header is the same as the login page. The page title is 'Reset Password'. The main content area contains the instruction: 'If you have forgotten your password then enter your email address in the field below. In the next 5 minutes you will be sent a link which will allow you to reset your password directly.' There is one input field labeled 'Email Address' which is highlighted in yellow. Below the field are 'Submit' and 'Cancel' buttons.

# Using TaskTracker

## Events & Tasks

The screenshot shows the 'Task Tracker' web application interface. At the top, there is a navigation bar with 'My Home | Events and Tasks | Calendar' and a user profile 'hlau@itresury.net' with a 'Logout' link. The main heading is 'Events and Tasks' with a sub-link 'My Events Home'. Below this, there are filters for '[Show Only My Events]' and '[Show Only Public Events]'. The 'My Events' section is active, showing a list of events starting in: 'Next 10 Days', '11-30 Days', 'More then 30 days', 'Show only Completed Events', 'Show only Prospects', and 'Show all'. A table lists two events:

Client	Course	Start Date	End Date	Booking Date	Status
DB L&D SIN	Financial Maths	28-04-2006	28-04-2006	27-02-2006	Booked
IBBM	Derivatives Accou...	26-06-2006	27-06-2006	20-02-2006	Booked

Page: 1

The 'My Sub-Tasks' section is also active, showing filters for 'Next 3 days', '3-10 Days', '11-30 days', 'over 30 days', 'Show Completed Tasks', 'Unknown Due Date', 'Overdue upto 14 days', 'Overdue over 14 days', and 'Show all'. A table lists two tasks:

Event Start	Client	Event	Due Date	Days to Go	Assigned User	Description	Status
28-04-2006	DB L&D SIN	Financial Maths	23-04-2006	46	Henry Lau	send course mater...	✗ Mark Complete
26-06-2006	IBBM	Derivatives Accou...	21-06-2006	105	Henry Lau	send course mater...	✗ Mark Complete

Page: 1

*My Events* Display the events that you are involved in with information on the client, course name, commencement / end date and the status of the course. You could also change the view to show only Public Events

*My Sub-Tasks* Display the tasks that are currently at hand and its completion status.


*Show Events* Display the events you want to view ranging from Next 10 days to Show all)

*Show Tasks* Display the tasks you want to view ranging from Next 10 days to Show all)



## Viewing Course Summary

Click on the course name under My Events to view the summary of the course

**Task Tracker** hlau@itresury.net 

[My Home](#) | [Events and Tasks](#) | [Calendar](#) [Logout](#)

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### Event - Financial Maths « My Events « Home

[\[Back to My Events and Tasks\]](#)

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#### Event Details

Course Name	Financial Maths
Public Name	-
Is this Event Public?	No
Level	Foundation
Aspect	Customer Focus
Venue	TBA
City	Singapore
Country	SG
Booking Date (DD-MM-YYYY)	27-02-2006
Event Start Date (DD-MM-YYYY)	28-04-2006
Event End Date (DD-MM-YYYY)	28-04-2006
Remarks	-

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#### Sponsor Details

Company / Division	DB L&D SIN
Client Administrator	Chloe Tseung - chloe.tseung@db.com

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#### Provider Details

Account Officer	* Doug McClymont - dmc_marketing@itresury.net
Speaker	Nic Weston - nic.weston@itresury.net
Provider Administrator	Doug McClymont - dmcclymont@itresury.net
Invoicing Entity	ITS Pte

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#### Sub Tasks for this Event:

Event Start	Client	Event	Due Date	Days to Go	Assigned User	Description	Status	
28-04-2006	DB L&D SIN	Financial Maths	23-04-2006	46	Henry Lau	send course mater...	<span style="color: red;">✗</span>	<a href="#">Mark Complete</a>

The summary is divided into event details, sponsor details, provider details and Subtask that you are required to complete for the course.





## Viewing Task Description

Click on Description under My Sub-Tasks to view summary of task

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[My Home](#) | [Events and Tasks](#) | [Calendar](#) [Logout](#)

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**No Reminder Sent** « My Events « Home

[\[Back to My Events and Tasks\]](#)

[\[Mark This Task as Complete\]](#) | [\[Send Reminder\]](#)

**Task Description** send course material to the client  
**Assigned User** Henry Lau  
**Due Date (DD-MM-YYYY)** 23-04-2006  
**Status** Incomplete  
**Summary Last Sent** 28-02-2006 17:17:33 Server Time

**Event this Task Belongs to:**

*Error Viewing Event, Please Contact your System Administrator*

## Mark a Task as complete

Click on Mark Complete for the task that is completed at the My Sub-Tasks

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[My Home](#) | [Events and Tasks](#) | [Calendar](#) [Logout](#)

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**Events and Tasks** « My Events « Home

[\[Show Only My Events\]](#) [\[Show Only Public Events\]](#)

**My Events**

Show events starting in:

[Next 10 Days](#) | [11-30 Days](#) | [More then 30 days](#) | [Show only Completed Events](#) | [Show only Prospects](#) | [Show all](#)

Client	Course	Start Date	End Date	Booking Date	Status
DB L&D SIN	Financial Maths	28-04-2006	28-04-2006	27-02-2006	Booked
IBBM	Derivatives Accou...	26-06-2006	27-06-2006	20-02-2006	Booked

Page: 1

**My Sub-Tasks**

Show tasks due within:

[Next 3 days](#) | [3-10 Days](#) | [11-30 days](#) | [over 30 days](#) | [Show Completed Tasks](#) | [Unknown Due Date](#) | [Overdue upto 14 days](#) | [Overdue over 14 days](#) | [Show all](#)

Event Start	Client	Event	Due Date	Days to Go	Assigned User	Description	Status	
28-04-2006	DB L&D SIN	Financial Maths	23-04-2006	46	Henry Lau	send course mater...	✗	Mark Complete
26-06-2006	IBBM	Derivatives Accou...	21-06-2006	105	Henry Lau	send course mater...	✗	Mark Complete

Page: 1



Enter in details of the task completion and submit by clicking on Mark complete or cancel to go back to main page.

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My Home | Events and Tasks | Calender Logout

### Change Task Completed Status

Are you sure you want change the status of Task 293.

Completion Comment

### Mark a Task as Incomplete

You would need to display the list of the completed tasks. This is located at the menu bar under My Sub-Tasks.

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My Home | Events and Tasks | Calender Logout

### Events and Tasks

[Show Only My Events] [Show Only Public Events] My Events Home

#### My Events

Show events starting in:

Next 10 Days | 11-30 Days | More then 30 days | Show only Completed Events | Show only Prospects | Show all

Client	Course	Start Date	End Date	Booking Date	Status
DB L&D SIN	Financial Maths	28-04-2006	28-04-2006	27-02-2006	Booked
IBBM	Derivatives Accou...	26-06-2006	27-06-2006	20-02-2006	Booked

Page: 1

#### My Sub-Tasks

Show tasks due within:


Next 3 days | 3-10 Days | 11-30 days | over 30 days | **Show Completed Tasks** | Unknown Due Date | Overdue upto 14 days | Overdue over 14 days | Show all

Event Start	Client	Event	Due Date	Days to Go	Assigned User	Description	Status
16-02-2006	WBC SYD	Intro to Financia...	11-02-2006	-24	Henry Lau	send course mater...	✓ Mark Incomplete
17-02-2006	WBC SYD	Financial Maths &...	12-02-2006	-23	Henry Lau	send course mater...	✓ Mark Incomplete
22-02-2006	IBBM	Repurchase Agreeem...	17-02-2006	-18	Henry Lau	send course mater...	✓ Mark Incomplete
23-02-2006	IBBM	Treasury Document...	18-02-2006	-17	Henry Lau	send course mater...	✓ Mark Incomplete
27-02-2006	IBBM	Fx Dealer Develop...	22-02-2006	-13	Henry Lau	send course mater...	✓ Mark Incomplete

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Select the appropriate task you wish to mark it as incomplete and click on Mark Incomplete.

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[My Home](#) | [Events and Tasks](#) | [Calendar](#) [Logout](#)


### Change Task Completed Status

Are you sure you want change the status of Task 89.

## Calendar

The calendar allows you to display only your events or public events.

You could navigate to the required month by clicking forward or backward on the hyperlinks. By clicking on the event name, you could view the events details for that respective course.

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[My Home](#) | [Events and Tasks](#) | [Calendar](#) [Logout](#)

### Events Calendar

[\[Show Only My Events\]](#) [\[Show Only Public Events\]](#)

<< **January 2006 - February 2006 -** March 2006 >>

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			<a href="#">1</a>	<a href="#">2</a>	<a href="#">3</a>	<a href="#">4</a>
<a href="#">5</a>	<a href="#">6</a>	<a href="#">7</a>	<a href="#">8</a>	<a href="#">9</a>	<a href="#">10</a>	<a href="#">11</a>
<a href="#">12</a>	<a href="#">13</a>	<a href="#">14</a>	<a href="#">15</a>	<a href="#">16</a> Intro to Fin...	<a href="#">17</a> Financial Ma...	<a href="#">18</a>
<a href="#">19</a>	<a href="#">20</a>	<a href="#">21</a>	<a href="#">22</a> Repurchase A...	<a href="#">23</a> Treasury Doc...	<a href="#">24</a>	<a href="#">25</a>
<a href="#">26</a>	<a href="#">27</a> Fx Dealer De...	<a href="#">28</a> Fx Dealer De...				

