

## **Practices for Lesson 7: To Do Lists**

**Overview**

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## Practices for Lesson 7: Overview

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### Lesson Overview

There are numerous events that trigger the creation of messages describing work that requires human attention. Each type of message appears in a unique To Do List. For example, there are unique To Do Lists for bill segment errors, payment errors, accounts without bill cycles, etc.

This lesson describes the system's To Do processing.

### Lesson Objectives

By the end of this lesson, you will be able to:

- Describe how the system creates the entries that appear in To Do lists
- View and work on the entries in To Do lists
- Introduce new To Do lists

## Practice 7-1: Look at To Do Lists

### Overview

In this practice, you will open the To Do Summary page and drill down to To Do Lists.

### Task

1. Open the **To Do Summary Page**
  - Navigate to **Menu > To Do > To Do Summary** (or press Alt+X).

To Do Summary				
Main				
User Name Student, 01				
To Do Type	Priority	Total	Open	Assigned to You
Bill segments in error	10	14	12	2
Pending orders	10	3	3	0
Pending start/stop SA for too long	10	9	9	0
Accounts without bill cycle	20	27	27	0
Auto pay amount over limit	20	157	157	0
Help Ticket	20 (8), 80 (1), 90 (12)	21	21	0
Investigate High Bill Complaint	20	3	3	0
New High Bill Complaint	20	10	10	0
Customer contact callback	30 (3), 70 (1), 90 (3)	7	7	0
Case Transition Exception	40	2	2	0
Miscellaneous Task (demo data propagation)	60 (1), 80 (1), 90 (5)	7	7	0
Capital credit retirement Errors	80	2	2	0
Create Bill Using Bill Cycle Errors	80	127	127	0
Create late payment charges Errors	80	1	1	0
Generate autopay for pay plans Errors	80	114	114	0
Monitor Budgets Errors	80	1	1	0
SA renewal error	80	1	1	0
Severance event trigger Errors	80	10	10	0
Sync Request Monitor Errors	80	1	1	0

The summary page shows all To Do lists that contain at least one message.

**Always up-to-date.** Every time you open this page, the totals are updated to reflect the current To Do entries.

2. Open a To Do List
  - Click the **Total Number** link next to *Pending start/stop SA for too long* to open a **To Do list**.  
**Do not click the Message column's links** (yet). If you click an entry's Message, it will be assigned to you. You will have a chance to do this in a future practice.

**To Do List** Bookmark Clear Save Refresh

Main

Info Pending start/stop SA for too long, Student, 01 To Do Type TD-SSFTL

Sort by Extra Information Date Search Extra Info Account Name

Filter by All

Select All Clear All

Priority	Create Date/Time	Related	Assigned Date/Time	Message	To Do Entry Status	Extra Information
<input type="checkbox"/> Priority 10 -- Highest	01-22-2013 03:06PM	0		SA - 2232163483 in Pending Start status for too long. It should have been activated or stopped as of 2010-01-10.	Open	Bowers Property Management, Commercial, \$0.00, 223
<input type="checkbox"/> Priority 10 -- Highest	01-22-2013 03:06PM	2		SA - 6439420786 in Pending Start status for too long. It should have been activated or stopped as of 2010-01-01.	Open	Brady,Sally, Residential, \$0.00, 6439420363
<input type="checkbox"/> Priority 10 -- Highest	01-22-2013 03:06PM	2		SA - 6439420095 in Pending Start status for too long. It should have been activated or stopped as of 2010-01-01.	Open	Brady,Sally, Residential, \$0.00, 6439420363
<input type="checkbox"/> Priority 10 -- Highest	01-22-2013 03:06PM	2		SA - 6439420648 in Pending Start status for too long. It should have been activated or stopped as of 2010-01-01.	Open	Brady,Sally, Residential, \$0.00, 6439420363
<input type="checkbox"/> Priority 10 -- Highest	01-22-2013 03:06PM	4		SA - 8534677881 in Pending Stop status for too long. It should have been activated or stopped as of 2010-06-15.	Open	Bush,Sandra, Residential, \$0.00, 8534677039
<input type="checkbox"/> Priority 10 -- Highest	01-22-2013 03:06PM	1		SA - 6288399109 in Pending Start status for too long. It should have been activated or stopped as of 2012-07-01.	Open	Harris,Andrew, Residential, \$0.00, 6288399046
<input type="checkbox"/> Priority 10 -- Highest	01-22-2013 03:06PM	2		SA - 9781240703 in Pending Start status for too long. It should have been activated or stopped as of 2010-03-01.	Open	Newhart,Bob, Residential, \$0.00, 9781240550
<input type="checkbox"/> Priority 10 -- Highest	01-22-2013 03:06PM	3		SA - 0453388275 in Pending Start status for too long. It should have been activated or stopped as of 2010-06-17.	Open	Russell,Beth, Residential, \$0.00, 0453388401
<input type="checkbox"/> Priority 10 -- Highest	01-22-2013 03:06PM	0		SA - 0877624693 in Pending Start status for too long. It should have been activated or stopped as of 2010-02-13.	Open	Watson,Peter, Residential, \$0.00, 0877624039

Assign Complete

- Click an entry's **Create Date/Time** to navigate into the **To Do entry** where you can see when it was created and objects associated with the entry.
  - Please **don't** click the **Complete** or **Forward** buttons (yet). You'll have chance to do this in a future practice.

**To Do Entry** Bookmark Clear Save Refresh

Main Keys/Values

To Do Pending start/stop SA for too long - Open, 01-22-2013 03:06PM To Do ID 99181054109258

To Do Type TD-SSFTL Pending start/stop SA for too long

Role C/ACTIV CI/Activity

Message SA - 2232163483 in Pending Start status for too long. It should have been activated or stopped as of 2010-01-10. (15, 10656)

Status Open

Priority Priority 10 -- Highest

Assigned To

Sent By

Comment

Actions Complete Forward Send Back

Characteristic Type	Characteristic Value
CI_ACCT Account	2232163778 Bowers Property Management, Commercial, \$0.00
C1-PER Person	9690050386 Bowers Property Management - Business/Work Phone: (415) 322-5656
CI_PREM Premise	6146833329 400 Sansome Street, San Francisco, CA, 94111
C1-SA Service Agreement	2232163483 California / Electric Commercial, ECOM1, Pending Start, 01-10-2010, Standard commercial service, 2232163483
C1-SP Service Point	6146833391 Electric - commercial/Monthly cycle - day 1/Route 2/400 Sansome Street, San Francisco, CA, 94111

Date / Time	Log Type	Details	Log User	Assigned To
01-22-2013 03:06PM	Created		Murray, Lynette (LMURRAY)	

Log

- Click **To Do** (or Alt+X) to return to the **To Do Summary** page.

## Practice 7-2: Create a Reminder on Your Customer Contact

### Overview

In this practice you will create a reminder on your customer contact.

### Tasks

1. Find your account.
  - If the **Dashboard** does not contain your account, return to **Control Central** and find your **account**.

Alerts	
Last Contact: 2 days ago -	Student,01
Field Activity Pending	
Pending Start	
6 sync request(s) outstanding	

Current Context	
	Student,Bruce 0352617723 7
	Student,Bruce, Residential, \$0.00
	1066 Your Street, San Francisco, CA, 94102

Financial Information	
Current Balance	\$0.00

2. Add a reminder to your contact.

In the previous lesson you created a **customer contact**.

  - Click the **Last Contact** alert in the **Alerts** zone (or click the **Last** link in the **Customer Contact** zone) to display this contact.

Main	Log	Characteristics	Customer Contact Portal
Customer Contact Info		Student,Bruce, 100 Cheesecake Blvd, San Francisco, General customer contact/General inquiry, Contacted 07-22-2016	
Customer Contact ID		0675842277	
Person ID	0675545340	Student,Bruce	Open <input type="checkbox"/>
Account ID	4730235614	Student,Bruce, Residential, \$0.00	User ID USER10 Student, 10
Premise ID	7702246500	100 Cheesecake Blvd, San Francisco, CA, 94102	
Preferred Contact Method	<input type="text"/>		
Contact Date/Time	07-22-2016 / 01:43PM		
Contact Class	General customer contact		
Contact Type	INQUIRE General inquiry		
Comments	Customer was interested in solar rebates		
Related Records			
Letter Information	<input type="button" value="Display Letter"/>		

3. In the grid at the bottom of the page, enter the following:
  - **Log Entry:** Call back in 30 days
  - **Reminder:** Send to User
  - **User:** Select your user ID
  - **Trigger Date:** 30 days from today

The screenshot shows the 'Customer Contact' interface. At the top, there are tabs for 'Main', 'Log', 'Characteristics', and 'Customer Contact Portal'. The main content area displays details for a customer contact: 'Student, Bruce, General customer contact/General inquiry, Contacted 06-18-2015'. Below this, there are several input fields: 'Person ID' (2099414534), 'Preferred Contact Method', 'Contact Date/Time' (06-18-2015 / 05:43PM), 'Contact Class' (General customer contact), and 'Contact Type' (INQUIRE). A 'Comments' section contains the text 'Customer was interested in Solar rebates'. At the bottom, there is a table with columns: 'Create Date/Time', 'Created by', 'Log Entry', 'Reminder', 'Send To', and 'Trigger Date'. The table contains one row with the following data: '06-20-2015 11:07AM', 'Student, 01', 'Call back in 30 days', 'Send to User', 'USER01', and '07-19-2015'.

4. **Save** your customer contact and inform your instructor when you finish.
5. When all students have updated their contact, **your instructor** will run the batch process that creates to do entries for customer contact reminders (*TD-CCCB*). This process creates new entries for reminders linked to customer contacts. It creates the entries in the Being Worked On state (rather than Open) when the reminder is set up for a specific user.

**Instructor Note:**

The following steps are only possible if the [Batch Job Submission](#) is enabled. You should verify this before the training class.

The following steps summarize what your instructor will be doing:

- Navigate to the **Batch Job Submission** page using **Menu > Tools > Batch Job Submission > Add**.
- Enter the following:
  - **Batch Code:** TD-CCCB and then click Save.
  - **Batch Business Date:** enter one month from today’s date
  - **LEAD-DAYS (Parameter):** 1

**Main**

Batch Job ID: 02371987072275

Batch Code: TD-CCCB To Do for Customer Contact

Thread Number: 0 Duplicate & Queue Cancel

Thread Count: 0

Batch Rerun Number: 0

Batch Business Date: 01-04-2016

Override Nbr Records to Commit: 0

Override Max Timeout Minutes: 0

User ID: USER10 Student, 10

Language: English

Email Address:

Desired Execution Date/Time: 12-04-2015 / 03:09PM

Batch Job Status: Pending

Program Name: CIPQCCCB

Trace Program Start:  Trace Program Exit

Trace SQL:  Trace Output

Parameter Name	Description	Parameter Value	Detailed Description	Required
LEAD-DAYS	Number of days	1	Number of days before the customer contact's reminder date that the To Do entry should be created. Valid values of 0 to 99 are acceptable.	<input type="checkbox"/>

The job should start immediately. Check to see if the job has finished by refreshing the page and checking for the **Batch Job Status** to become *Ended*.

- To check if it ran successfully, navigate to the **Batch Run Tree** using the context menu adjacent to the **Batch Code**. You should see something like this (except the number of records will be higher):

**Main** **Run Control**

Batch Control: To Do for Customer Contact Date Time 12-04-2015 03:09PM

Batch Number: 6

Batch Rerun Number: 0

- Batch Code TD-CCCB - Batch Number 6 - Batch Rerun Number 0 - Batch Business Date 01-04-2016 - Run Status Complete
  - Processed 1 record(s) in 2 second(s)
    - Thread Nbr 1 - Complete Processed 1 record(s) in 2 second(s)
      - Batch Instance 77595 - Records Processed 1 - Records in Error 0 - Restart Data
        - Informational - CIPQCCCB - Batch thread 1 of 1 started at 2015-12-04-15.07.53
        - Informational - CIPQCCCB - Batch thread 1 ended normally at 2015-12-04-15.07.55.

After the batch job is complete, each student can continue with the practice.

- When the job has finished, navigate to the **To Do Summary** page (**Menu > To Do Menu > To Do Summary** or Alt+X).

To Do Type	Priority	Total	Open	Assigned to You
Bill segments in error	10	12	12	0
Pending start/stop SA for too long	10	9	9	0
Accounts without bill cycle	20	27	27	0
Auto pay amount over limit	20	157	157	0
Help Ticket	20 (8), 80 (1), 90 (12)	21	20	1
Investigate High Bill Complaint	20	3	3	0
New High Bill Complaint	20	10	10	0
Customer contact callback	30 (43), 70 (1), 90 (3)	47	46	1
Case Transition Exception	40	2	2	0

You should see that one To Do entry is assigned to you for the **Customer contact callback To Do Type**. Click the **number** or the bar to see it:

Priority	Create Date/Time	Related	Assigned Date/Time	Message	To Do Entry Status
<input type="checkbox"/> Priority 30	07-07-2015 03:13PM	0	07-07-2015 03:13PM Student, 10 (USER10)	<a href="#">Customer Contact reminder: zaroli,todo</a>	Being Worked On

- Click the link under the **Message** column to see the original contact.

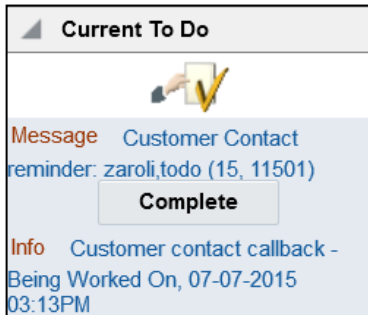
Create Date/Time	Created by	Log Entry	Reminder	Send To	Trigger Date
06-25-2015 02:44PM	Student, 10	call the customer to discuss	Send to User	USER10 Student, 10	07-13-2015



9. Use the **To Do dashboard** zones.

If your **Dashboard** does not contain the **To Do Summary** and the **Current To Do Zones**, change your user preferences accordingly (navigate to **My Preferences**, click the **Portal Preferences** tab and then display these zones for the **Dashboard** portal).

- Notice that the **Current To Do Zone** highlights the **To Do entry**.



- Navigate back to **Control Central** and then click the **Message** in the **Current To Do Zone**. Notice that you return to the customer contact that caused the entry to be created.
- Click the **To Do Age bar** in your **To Do Summary** zone (you will return to the To Do List for this To Do type).

## Practice 7-3: Related To Dos

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### Overview

In this practice you will create another To Do entry for your customer and see how the system highlights the existence of related entries.

### Tasks

1. Create a **Help Ticket** for your **Account**
  - Navigate to **Menu > To Do > To Do Entry > Add**
  - After the page displays, please enter the following information:
    - **To Do Type:** Help Ticket
    - **Subject:** Change Bill Cycle
    - **Comment:** The customer would like to change bill cycles so that they receive their bill on the 16<sup>th</sup> of the month.
    - **Characteristic Value:** Use the account search to find your account ID.

All other attributes should default and don't require overrides.

To Do Type	Help Ticket	To Do Type Priority	Priority 20
Override Priority			
Subject	Change Bill Cycle		
Comment	The customer would like to change bill cycles so that they receive their bill on the 16th of the month.		
Send To	Role		
Role	SUPPORT	Customer support	
<b>Characteristics</b>			
	Characteristic Type	Characteristic Value	
+ -	CL_ACCT	Account	4182916324 Student, Bruce, Residential, \$0.00

2. Click **OK** to add the **To Do entry** (it will be in the open state and assigned the **To Do role** defined above).
3. Search for your customer in Control Central.
  - Notice that the **Dashboard Alerts zone** indicates that there are two **To Dos** for your customer.

**Alerts**

Last Contact: Today - Student,01

**2 Outstanding To Do Entries For Account**

1 Open CSS Service Task(s)

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**Current Context**

Student, Bruce  
4182916324 9

Student, Bruce, Resident  
\$0.00

1066 Your Street, San Francisco, CA, 94102

- Click the **Alerts** zone's alert to see both entries. You will be navigated to the **To Do Search** transaction:

Related To Do Filter: Not Applicable

To Do Type Filter: All

Char Type Filter: Specific Char Type    Characteristic Type: Account    Characteristic Value: 4182916324

User Filter: Not Applicable

Date Range Filter: All

Status Filter: Open & Being Worked

Select All    Clear All    2 record(s) found matching your criteria.

	Priority	Create Date/Time	Related	Last Assigned Date/Time	Message	Status
<input type="checkbox"/>	Priority 20	10-19-2017 07:44PM	1		Change Bill Cycle (15, 1000)	Open
<input type="checkbox"/>	Priority 30	10-19-2017 07:38PM	1	10-19-2017 07:38PM Student, 01 (USER01)	Customer Contact reminder: Student, Bruce (15, 11501)	Being Worked O

- Notice the Status of each entry. Also notice the values in the **Related** column (this indicates that there's one other entry related to each of these To Dos).
- Take responsibility for the **help ticket**.
    - Navigate to **Menu > To Do > To Do Summary**
    - Click the link in the **Total** column for **Help Ticket**
    - Find your **Help Ticket To Do** and click the **message link** to start working it.

Info Help Ticket, Student, 01 To Do Type

Sort by  Date   Extra Info Subject

Filter by

		Priority	Create Date/Time	Related	Assigned Date/Time	Message	To Do Entry Status	Extra Information
<input type="checkbox"/>		Priority 20	06-01-2010 03:19PM	3		Bills are too high	Open	Bills are too high
<input type="checkbox"/>		Priority 20	02-02-2012 03:25PM	6		Bills are too high	Open	Bills are too high
<input type="checkbox"/>		Priority 20	10-19-2017 07:44PM	1		<a href="#">Change Bill Cycle</a>	Open	Change Bill Cycle

6. This will navigate you to the help ticket and assign it to your user ID. Notice how the **Current To Do** zone now looks:

**Current To Do**

Message [Change Bill Cycle \(15, 1000\)](#)

Info [Help Ticket - Being Worked On, 10-19-2017 07:44PM](#)

Related To Do [1 Related To Do Exist - 1 Assigned To You](#)

- **Notice** the **Related To Do** is highlighting the customer contact reminder. Also notice how it indicates that it's already assigned to you.
- Finally, review the **To Do Summary** zone. You should see two entries, one for the **Help Ticket** and another for the **Customer contact callback**

**To Do Summary**

To Do Type	Assigned to
Help Ticket	
Customer contact callback	

## Practice 7-4: Complete Your Entries

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### Overview

In this practice you will complete the entries that were just created.

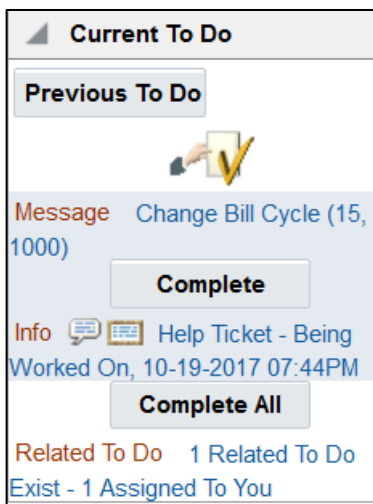
### Tasks

1. Use the **Complete All** button.

The **Current To Do** zone has two ways to complete a **To Do** entry:

- You can complete just the current **To Do**
- You can complete the current **To Do** plus all related **To Dos**

2. Please click the **Complete All** button.



After doing this, notice the following:

- *The alert is removed from the Alerts zone.*
- *The Current To Do zone shows that the current To Do is complete.*
- *The To Do Summary zone still shows the items for the Help Ticket and another for the Customer contact callback. This is because this zone is not automatically refreshed after an update in order to improve performance. Click the Refresh button to refresh this zone.*

3. Find your account's entries.

Navigate to **Menu > To Do > To Do Search**. When it opens, please enter the following information:

- **Char Type Filter:** Specific Char Type
- **Characteristic Type:** Account
- **Characteristic Value:** Please use the search to find your account ID
- **Date Range Filter:** All
- **Status Filter:** Completed

4. Scroll to the right to click the **Search** button. You will see your two completed entries.

Related To Do Filter:

To Do Type Filter:

Char Type Filter:  Characteristic Type:  Characteristic Value:   Student, Bruce, Residential, \$0.00

User Filter:

Date Range Filter:

Status Filter:


**2 record(s) found matching your criteria.**

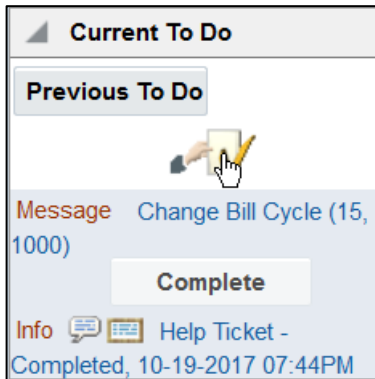
	Priority	Create Date/Time	Related	Last Assigned Date/Time	Message	Status	Completion Date/Time	To Do Type
<input type="checkbox"/>	Priority 20	10-19-2017 07:44PM	0	10-19-2017 07:54PM Student, 01 (USER01)	Change Bill Cycle (15, 1000)	Completed	10-19-2017 07:56PM Student, 01 (USER01)	Help Ticket
<input type="checkbox"/>	Priority 30	10-19-2017 07:38PM	0	10-19-2017 07:38PM Student, 01 (USER01)	Customer Contact reminder. Student, Bruce (15, 11501)	Completed	10-19-2017 07:56PM Student, 01 (USER01)	Customer contact callback

5. Feel free to click the **Create Date/Time** column to see the entry and its history.

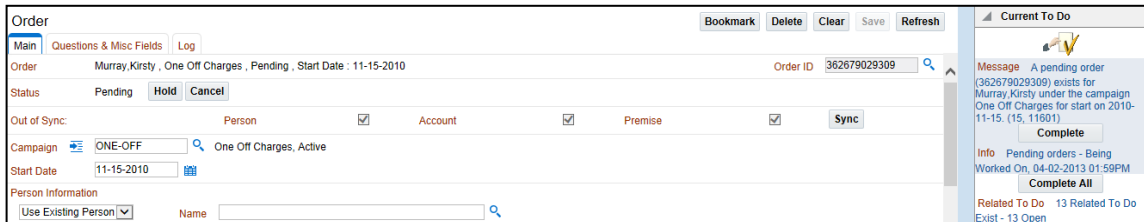
## Practice 7-5: Get Your Next Assignment

### Tasks

1. Click the **Assign Me a To Do** button  in the **Current To Do** zone.
  - **Note:** the system leaves the most recent To Do in the zone until you start working a new To Do or log back in.



- The system will invoke the **Next To Do Assignment plug-in** (plugged in on the installation record).
- The following is a snapshot of how the system looks when the **To Do entry** that was assigned is related to an old service agreement that hasn't been started yet. *Notice how the system immediately navigates to the entry's related transaction and refreshes the Dashboard accordingly.*



2. Navigate to the **Supervisor User Summary** page (Menu > To Do > Supervisor User Summary) and see who's doing what:

Main				
User Name Student, 10				
User ID	User Name	To Do Type	Assigned this Type	Assigned Total
BSCHER	System, English	Help Ticket	19	19
CRUPPERT	Ruppert , Charlie	Customer contact callback	5	5
HNGUYEN	Nguyen, Hung	Customer contact callback	7	7
LMURRAY	Murray, Lynette	Create Bill Using Bill Cycle Errors	1	17
LMURRAY	Murray, Lynette	Miscellaneous Task (demo data propagation)	11	17
LMURRAY	Murray, Lynette	Customer contact callback	2	17
LMURRAY	Murray, Lynette	Order callback	1	17
LMURRAY	Murray, Lynette	Pending orders	1	17
LMURRAY	Murray, Lynette	Pending start/stop SA for too long	1	17
MPINERO	Pinero, Marlon	Miscellaneous Task (demo data propagation)	1	3
MPINERO	Pinero, Marlon	Customer contact callback	1	3
MPINERO	Pinero, Marlon	Accounts without bill cycle	1	3
RGULPEO	Gulpeo, Rissa	Customer contact callback	3	3
SYSUSER	System, English	Help Ticket	4	8

3. Navigate to the **Supervisor To Do Summary** page (Menu > To Do > Supervisor To Do Summary) and see what's being worked on:

Main					
User Name Student, 10					
To Do Type	Priority	Total	Open		Being Worked On
Bill segments in error	10	14	12		2
Order callback	10	1	0		1
Pending orders	10	4	0		4
Pending start/stop SA for too long	10	10	9		1
Accounts without bill cycle	20	30	27		3
Auto pay amount over limit	20	157	157		0
Help Ticket	20 (12), 80 (20), 90 (12)	44	19		25
Investigate High Bill Complaint	20	3	3		0
New High Bill Complaint	20	10	10		0
Customer contact callback	30 (51), 70 (13), 90 (3)	67	46		21
Case Transition Exception	40	2	2		0
Miscellaneous Task (demo data propagation)	60 (1), 80 (13), 90 (5)	19	7		12



# Practice 7-6: Review a To Do Type

## Overview

In this practice you will review other information defined on the To Do Type configuration table.

## Tasks

1. Navigate to **Admin > General > To Do Type > Search** and then select any type that looks interesting.

The screenshot shows the configuration page for a 'To Do Type' named 'TD-SSFTL'. The page has several tabs: 'Main', 'Roles', 'Sort Keys', 'Drill Keys', 'Message Overrides', 'To Do Characteristics', and 'Algorithms'. The 'Main' tab is active. The configuration fields are as follows:

- Description:** Pending start/stop SA for too long
- Detailed Description:** To Do entries of this type are created by the associated creation process. Refer to the Batch Control for the creation process. To Do entries will only be created if you have scheduled the associated background process. The message parameters for this To Do type's message are: %1 - The SA Id, %2 - The SA Status, %3 - The event date. To Dos of this type may have their role assigned based on the account's account management group or division.
- Priority:** Priority 10 -- Highest
- To Do Type Usage:** Automatic
- Navigation Option:** saMaintMain (linked to Service Agreement)
- Creation Process:** TD-SSFTL (linked to To Do for Old Pending Start/Stops)
- Routing Process:** (empty)
- Message Category:** 15 (linked to CIS To Do List)
- Message Number:** 10656 (linked to SA - %1 in %2 status for too long. It should have been activated or stopped as of %3.)

	Characteristic Type	Sequence	Characteristic Value
+	Skill level - Billing exceptions	1	2  Level 2
+	Skill level - Meter management exceptions	1	3  Level 3

If you are not familiar with all of the options on all of the pages, please ask your instructor for assistance.

## Review Questions

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1. A specific user is assigned to a To Do entry when it is in the state of Being Worked On. True/False  
*True*
2. A To Do entry may get assigned to a user when they drill down on the entry's message. True/False  
*True*
3. Only the user assigned to a Being Worked On To Do entry may see the entry in the To Do Summary page. True/False  
*True*
4. Assume there is an entry that highlights an account without a bill cycle. When a user assigns a bill cycle to the account, the To Do entry will be completed automatically by the system. True/False  
*True. The answer is true, but it's important to understand that the system will only automatically complete the entry the next time the background process responsible for the creation and completion for such a To Do entry executes. If a user wants to mark it as Complete before the process runs, they can.*
5. A supervisor is a user who is part of a To Do role who also has access to the supervisor pages. True/False  
*True. There is no specific attribute on a user that designates them as a supervisor.*
6. The system issues a warning if you attempt to assign a To Do entry that has a special skills requirement to a user that doesn't have these skills. True/False  
*True*
7. Some To Do lists have the same message text for every entry, while others have different messages for the various entries. True/False  
*True. It's up to the process that creates the entry - if it supplies a specific message number, it's used; if it doesn't, the default on the To Do type is used.*
8. An implementation will probably use a combination of On Demand and Supervisor Push work distribution methods. True/False  
*True. The system has been designed to support both methods in a single implementation.*
9. A Complete entry can be re-opened. True/False  
*False. Only a Being Worked On entry can be re-opened.*
10. The Alerts zone will highlight if the person / account / premise in context has open or being worked on To Do entries. True/False  
*True*

11. If an implementation prefers different message verbiage for a To Do entry, implementers must create a new message and define it on a new To Do type. True/False  
*False. You haven't been told this yet, but every message's text can be overridden by an implementation. To do this, display the message on Admin > System > Message and specify the text that you prefer.*
12. Assume a specific To Do list is being populated with hundreds of entries with the same message number. It would be a good idea to update the To Do Type to indicate that To Do entries should be suppressed for the specific message number (and your team should create a report or a "sample and submit" instead). True/False  
*True.*
13. Assume there is an entry that highlights an account without a bill cycle. A user can set the status of the entry to Complete without specifying a bill cycle for the account. True/False  
*True. If a user does this, the system will recreate the entry the next time the respective background process runs.*
14. In order to Forward or Send Back an entry, a user should first click the entry's date/time or info string to open the To Do Entry maintenance page. True/False  
*True*