Client Training HQ

Using the Enhanced Activities Feature

The Enhanced Activities feature provides your organization with additional activity tracking capabilities. This feature allows you to pre-define target completion dates, assign activity responsibility within process types, formulate To Do lists for users, and establish average processing times to develop and analyze metrics for performance. Target completion dates provide visual cues to users within the Foreign National's (FN) Activities tab and can be compared against completion dates via the Activities report.

If your Firm has already been implemented, contact Custom Support to request activation of the Enhanced Activities feature. If you are still in the implementation process, please reach out to your Implementation & Training Specialist for more information.

Understanding Enhanced Reporting Capabilities

The Enhanced Activities feature improves reporting capabilities by using the Activities data type when generating interactive reports. Report results may be filtered by date ranges, whether an activity has been completed, which user each activity is assigned to, and more.

Configuring Enhanced Activities

Prior to incorporating Enhanced Activities into your organization's workflow, we recommend that you review and customize the default Target Date and Activity Assignment settings found within **Administrative Settings > Processes > Activities**.

If not already completed, organizations should also review and customize the activities in use by each process type, as well as the activity order, before attempting to customize Enhanced Activity settings.

To audit or edit activity order per process type:

1. Select the desired process.
2. Click **Edit Process Activity Details**.

Images are examples and for information purposes only. They may vary across platforms and are subject to change.

Changing Target Days Values

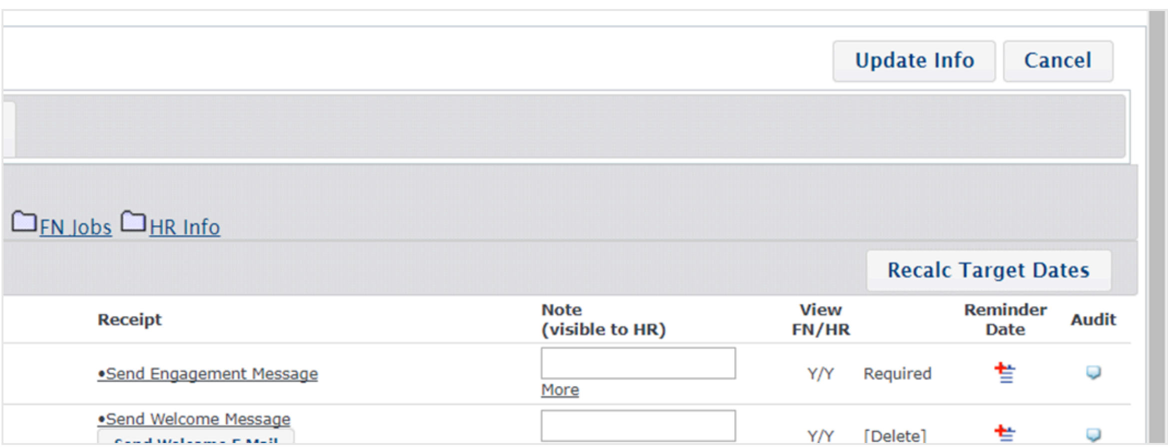
The Target Days column will determine the target completion date for each activity upon opening a new case. Administrative users should enter the number of days in which an activity should be completed. Values entered do not include weekends; we recommend entering "5" instead of "7" when aiming to have an activity completed within a week. Entering a zero will result in the activity's Target Date being identical to the prior activity; enter zero when a group of activities should be completed on the same day.

Notes:

- Changes to Target Day values **are not** retroactive to already-created processes.
- The Target Date provides a visual cue to users on the timeliness of each upcoming activity. Incomplete activities with a green dot have a Target Date of the present date or a future date. Incomplete activities with a red exclamation mark have a Target Date in the past.
- Once an activity is marked Completed, the green dot or red exclamation mark will remain, indicating whether or not the activity was completed by the Target Date.

Target Dates for incomplete activities can be modified, as needed, which can be useful in situations where a certain activity needs to be pushed back, when processing times fluctuate, etc.

Once a Target Date has been modified, users must click either the **Update Info** button or the **Recalc Target Dates** button. Update Info will save the new Target Date but will not make adjustments to any other activities. Recalc Target Dates will push back the Target Dates for all incomplete activities after the activity being modified.



Note: Target Dates for prior activities/any completed activities will **not** be adjusted.

Assigning Default Roles

The Default Role column is used to assign an activity to a specific user role that is typically responsible for completing that type of activity. Assigning default roles is optional, but - If used - it provides an effective way to generate To Do lists for users and to manage and forecast individual workloads. Assignments can be changed at any time from within a particular process, regardless of whether a default role was defined.

Note: Changes to default role assignments **are not** retroactive to already-created processes.

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Using Activity Descriptions

The Description column is used to provide users with additional information about a particular activity. Descriptions are visible as pop-out windows under each activity name, from the Activities page within a case. ICM provides default descriptions for some activities, but you may customize the descriptions as desired. Descriptions can be up to 255 characters long, including spaces.

Note: Changes to Activity Descriptions **are** retroactive to already-created processes.

If defined from the Administrative Settings, full descriptions for each activity can be viewed by hovering over the portion of the description shown directly under the activity name.

More Training Available!

Check out additional training resources available on our site, Connections.

The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.