

Enhanced Process Activities

With the deployment of enhanced activity tracking, organizations can pre-define target dates and assign activity responsibility within process types to develop and analyze metrics for performance, establish processing times and formulate to-do lists for users. Target dates provide visual cues to users within the foreign national's Activities tab to indicate timeliness. Target dates as well as completion information is reportable through the Activities report.

If your Edge site has already been implemented please contact Custom Support to request activation of the **Enhanced Processes Activities** feature. If are still in the implementation process please reach out to your Implementation & Training Specialist.

FN/Individual / Abbott, James Vern (123456789) / Processes Forms

(A# 123456789) [AOS Family] RJR/RJR/-/-/- Case pending, DO NOT TRAVEL

Personal Nationality Immigration **Processes Forms** Dependents Sponsors Education Employment Financial Misc Travel Visa Status OnDocs Notes FN Billing Case Overview

Activities AOS Family Rename Process Add Process

View: Assignment Forms Required Docs Questionnaire **Activities** Receipts Instructions OnDocs FN Jobs HR Info

Activity Name <i>Description</i>	Target Date	Date Completed	Assigned To	Receipt
Date Opened	● 02/12/2018	02/12/2018	Reaume, Robert	•Send Engagement Message
Online Intake Date <i>Date New Case is opene...</i>	● 02/13/2018	02/13/2018	Reaume, Robert	•Send Welcome Message Send Welcome E-Mail
FN Questionnaires Submitted <i>Electronic Questionnai...</i>	● 02/13/2018	02/13/2018	Reaume, Robert	
FN Questionnaires Completed <i>Electronic Questionnai...</i>	! 02/16/2018	02/17/2018	Reaume, Robert	
Date I-130 Petition Previously Approved <i>Approval Date of Previ...</i>	● 02/16/2018	01/01/2016	Reaume, Robert	
Date I-130 Petition Filed Concurrently (One-Step) <i>Filing Date of Concurr...</i>	● 02/16/2018		Reaume Robert	
Affidavit of Support <i>Affidavit of Support p...</i>	Affidavit of Support provided to Sponsor of I-864		Reaume, Robert	
All FN Docs Received <i>All Required Documents...</i>	● 02/21/2018	02/21/2018	Reaume, Robert	
Signed Affidavit of Support Received <i>Signed Affidavit of Su...</i>	● 02/28/2018	02/28/2018	Reaume, Robert	
AOS Application Prepared <i>Forms and Supporting D...</i>	● 03/02/2018	03/02/2018	Rodriguez, Cynthia	
AOS Application Filed <i>Prepared and Signed AO...</i>	● 03/05/2018	03/05/2018	Reaume, Robert	•Send Application Filed Message •DOL Processing Times
Receipt Date <i>Receipt Date as Entere...</i>	● 03/14/2018	03/14/2018	Reaume, Robert	USCIS Upload •Send Receipt # Received Message

1 **Target Dates** provide users with expected completion dates for each Activity.

2 The **Assigned To** column displays who is responsible for completing each Activity.

3 **Activity Descriptions** can be added to provide users with additional information.

Reporting

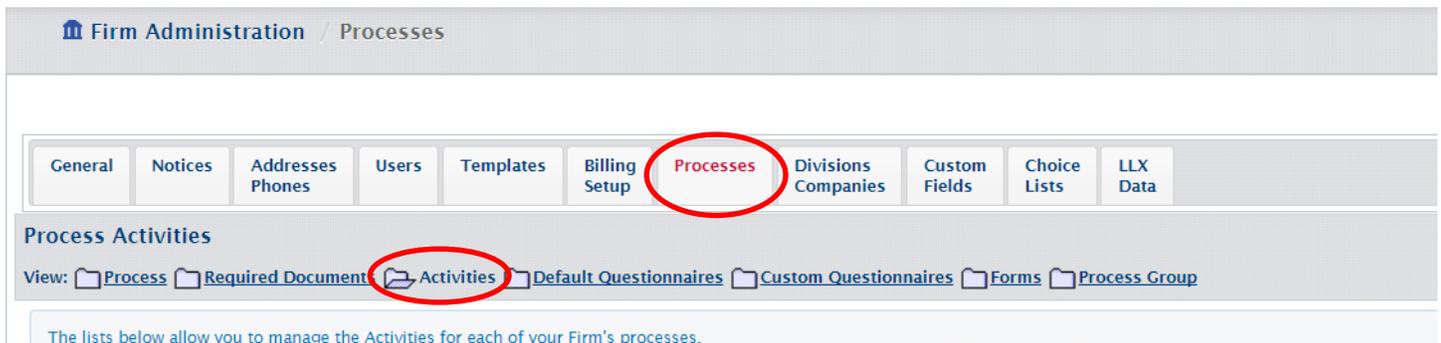
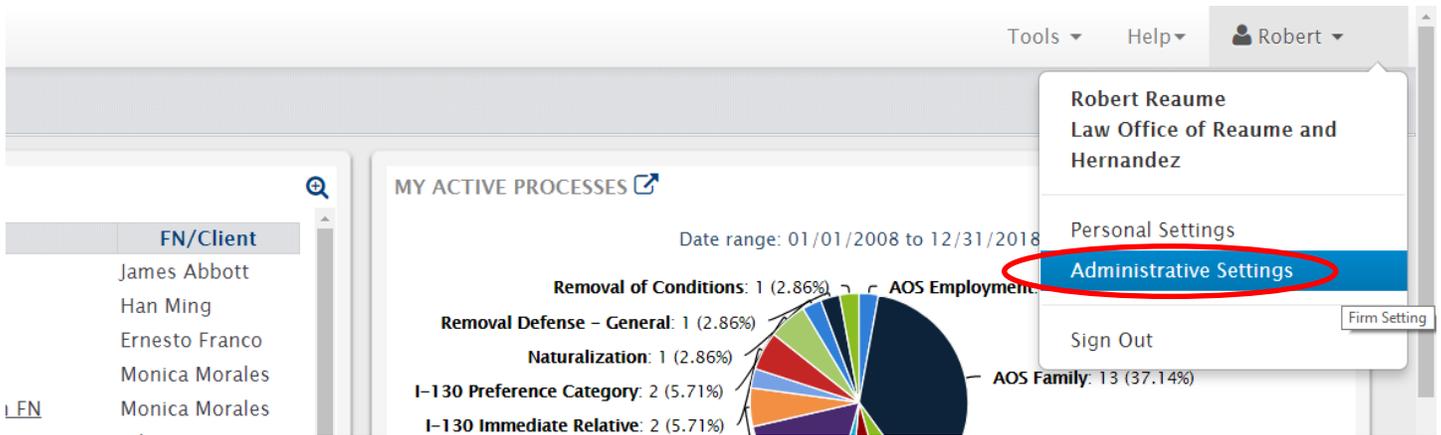
Enhanced Activities provide additional reporting capabilities by using the **Activities** data type when generating **Interactive** reports. Results can be filtered by date ranges, whether an Activity has been completed, who it's assigned to, and more. This provides an effective means for determining past and future workloads, calculating processing times, and generating to-do lists for specific users.

FN Full Name	Process Type	Activity Name	Activity Target Date	Activity Date Completed	Activity Assigned To
ABBOTT, JAMES VERN [COUNT: 30]					
Abbott, James Vern	AOS Family	Date Opened	02/12/2018	02/12/2018	Reaume, Robert
Abbott, James Vern	AOS Family	Online Intake Date	02/13/2018	02/13/2018	Reaume, Robert
Abbott, James Vern	AOS Family	FN Questionnaires Submitted	02/13/2018	02/13/2018	Reaume, Robert
Abbott, James Vern	AOS Family	FN Questionnaires Completed	02/16/2018	02/17/2018	Reaume, Robert
Abbott, James Vern	AOS Family	Date I-130 Petition Previously Approved	02/16/2018	01/01/2016	Reaume, Robert

Configuring Enhanced Activities

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

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



Select the desired process and click **Edit Process Activity Details**.

The screenshot shows the 'Firm Administration / Processes' interface. The 'Process Activities' section is active, displaying a list of activities for the 'AOS Family' process. The 'Process' dropdown is set to 'AOS Family'. The 'Edit Process Activity Details' button is circled in red.

Targets Days

The **Target Days** column will determine the Target Date of each Activity upon opening a new case. Enter in the number of days by which an Activity should be completed compared to the Activity that comes directly prior.

Values entered do not include weekends. Because of this, consider entering **5** instead of **7** when aiming to have an Activity completed within a week.

Entering a **0** will result in the Activity's Target Date being identical to the *prior* Activity. Use this when a group of Activities should be completed on the same day.

The screenshot shows the 'Edit Process Activity Details' dialog box for the 'AOS Family' process. The 'Target Days' column is circled in red. The table lists activities with their descriptions, target days, and default roles.

Activity	Description	Target Days	Default Role
Date Opened		0	Case Manager
Online Intake Date	Date New Case is opened in EDCE/Clebotrator	1	Responsible Attorney
FN Questionnaires Submitted	Electronic Questionnaires Provided to Foreign	0	Not Assigned
FN Questionnaires Completed	Electronic Questionnaires Completed by Foreign	3	Not Assigned
Date I-130 Petition Previously Approved	Approval Date of Previously Approved I-130	0	Not Assigned
Date I-130 Petition Filed Concurrently (One-Step)	Filing Date of Concurrently Filed I-130	0	Not Assigned
Affidavit of Support Sent to Sponsor	Affidavit of Support provided to Sponsor of I	1	Not Assigned
All FN Docs Received	All Required Documents Received from Foreign	1	Not Assigned
Signed Affidavit of Support Received	Signed Affidavit of Support Received from	5	Not Assigned
AOS Application Prepared	Forms and Supporting Documents Prepared for	2	Not Assigned
AOS Application Filed	Prepared and Signed AOS	1	Not Assigned

Note: Changes to Target Day values are **not** retroactive to processes already created.

Default Roles

The **Default Roles** column is used to assign an Activity to a specific user who is typically responsible for completing that Activity. The user assigned will be dependent on the **Case Assignments** for that particular process.

Assignments can be changed at any time from within a particular process, regardless of whether a default was defined.

Assigning default roles is an *optional* aspect of Enhanced Activities. If used, it provides an effective way to generate to-do lists for users, and to manage and forecast individual workloads.

Edit Process Activity Details

Process: AOS Family Sort By Activity

Activity	Description	Target Days	Default Role
Date Opened		0	Not Assigned
Online Intake Date	Date New Case is opened in EDCE/Clebotter	1	Not Assigned
FN Questionnaires Submitted	Electronic Questionnaires Provided to Foreign	0	Responsible Attorney
FN Questionnaires Completed	Electronic Questionnaires Completed by Foreign	3	Partner
Date I-130 Petition Previously Approved	Approval Date of Previously Approved I-130	0	Collaborating Attorney
Date I-130 Petition Filed Concurrently (One-Step)	Filing Date of Concurrently Filed I-130	0	Case Manager
Affidavit of Support Sent to Sponsor	Affidavit of Support provided to Sponsor of I	1	Paralegal
All FN Docs Received	All Required Documents Received From Foreign	1	Not Assigned
Signed Affidavit of Support Received	Signed Affidavit of Support Received from	5	Not Assigned
AOS Application Prepared	Forms and Supporting Documents Prepared for	2	Not Assigned
AOS Application Filed	Prepared and Signed AOS	1	Not Assigned

Update Info Update and Return Cancel

Note: Changes to Default Role assignments are **not** retroactive to processes already created.

Activity Description

The **Description** column is used to provide users with additional information on a particular Activity. The descriptions will be visible as pop-out windows under each Activity name, from the Activities page within a case.

Edge provides a variety of default descriptions for many Activities, while others are blank. Organizations may customize these descriptions as desired.

Descriptions can be up to **255** characters long, including spaces.

Edit Process Activity Details

Process: AOS Family Sort By Activity

Activity	Description	Target Days	Default Role
Date Opened	<input type="text"/> <small>You have 255 characters remaining</small>	<input type="text" value="0"/>	<input type="text" value="Not Assigned"/>
Online Intake Date	<input type="text" value="Date New Case is opened in EDCF/Clobetrotter"/>	<input type="text" value="1"/>	<input type="text" value="Not Assigned"/>
FN Questionnaires Submitted	<input type="text" value="Electronic Questionnaires Provided to Foreign"/>	<input type="text" value="0"/>	<input type="text" value="Not Assigned"/>
FN Questionnaires Completed	<input type="text" value="Electronic Questionnaires Completed by Foreign"/>	<input type="text" value="3"/>	<input type="text" value="Not Assigned"/>
Date I-130 Petition Previously Approved	<input type="text" value="Approval Date of Previously Approved I-130"/>	<input type="text" value="0"/>	<input type="text" value="Not Assigned"/>
Date I-130 Petition Filed Concurrently (One-Step)	<input type="text" value="Filing Date of Concurrently Filed I-130"/>	<input type="text" value="0"/>	<input type="text" value="Not Assigned"/>
Affidavit of Support Sent to Sponsor	<input type="text" value="Affidavit of Support provided to Sponsor of I"/>	<input type="text" value="1"/>	<input type="text" value="Not Assigned"/>
All FN Docs	<input type="text" value="All Required Documents"/>	<input type="text" value="1"/>	<input type="text" value="Not Assigned"/>

Update Info Update and Return Cancel

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

Working with Enhanced Activities

Once enabled for your Edge site, the **Activities** page will display additional columns for **Target Date** and **Assigned To**, as well as the Activity **Descriptions** under each Activity Name.

FN/Individual / Abbott, James Vern (123456789) / Processes Forms

(A# 123456789) [AOS Family] RJR/RJR/-/-/ Case pending, DO NOT TRAVEL

Update Info Cancel

Personal Nationality Immigration Processes Forms Dependents Sponsors Education Employment Financial Misc Travel Visa Status OnDocs Notes FN Billing Case Overview

Activities AOS Family Rename Process Add Process

View: Assignment Forms Required Docs Questionnaire Activities Receipts Instructions OnDocs FN Jobs HR Info

Recalc Target Dates

Activity Name Description	Target Date	Date Completed	Assigned To	Receipt	Note (visible to HR)	View FN/HR	Reminder Date	Audit
Date Opened	● 02/12/2018	02/12/2018	Reaume, Robert	•Send Engagement Message	More	Y/Y	Required	
Online Intake Date Date New Case is opene...	● 02/13/2018		Reaume Robert	•Send Welcome Message Send Welcome E-Mail	More	Y/Y	[Delete]	
FN Questionnaires Submitted Electronic Questionnai...	● 02/13/2018		Reaume Robert		More	Y/Y	[Delete]	

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Update Info Cancel

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Recalc Target Dates

Activity Name Description	Target Date	Date Completed	Assigned To	Receipt	Note (visible to HR)	View FN/HR	Reminder Date	Audit
Date Opened	● 02/12/2018	02/12/2018	Reaume, Robert	•Send Engagement Message	More	Y/Y	Required	
Online Intake Date Date New Case is opene...	● 02/13/2018		Reaume Robert	•Send Welcome Message Send Welcome E-Mail	More	Y/Y	[Delete]	
FN Questionnaires Submitted Electronic Questionnai...	! 02/13/2018		Reaume Robert		More	Y/Y	[Delete]	
FN Questionnaires Completed Electronic Questionnai...	● 02/16/2018		Reaume Robert		More	Y/Y	[Delete]	
Date I-130 Petition Previously Approved	● 02/16/2018		Reaume Robert		More	Y/Y	[Delete]	

Target Date

The **Target Date** provides a visual cue to users on the timeliness of each Activity.

Incomplete Activities with the green dot ● have a Target Date of today or in the future.

Incomplete Activities with the red exclamation mark ! have a Target Date in the past.

Personal Nationality Immigration Processes Forms Dependents Sponsors Education Employment Financial Misc Travel Visa Status OnDocs Notes FN Billing Case Overview

Activities AOS Family Rename Process Add Process

View: Assignment Forms Required Docs Questionnaire Activities Receipts Instructions OnDocs FN Jobs HR Info

Activity Name Description	Target Date	Date Completed	Assigned To	Receipt
Date Opened Date New Case is Opene...	● 02/01/2018	02/01/2018	Reaume, Robert	•Send Engagement Message
Online Intake Date Date New Case is opene...	! 02/01/2018		Reaume Robert	•Send Welcome Message Send Welcome E-Mail
FN Questionnaires Submitted Electronic Questionnai...	! 02/01/2018		Not Assigned	
FN Questionnaires Completed Electronic Questionnai...	● 02/06/2018		Not Assigned	

Once an Activity is marked **Completed** the green dot or red exclamation mark will remain, indicating whether or not the Activity was completed on time.

Activity Name Description	Target Date	Date Completed	Assigned To	Receipt
Date Opened Date New Case is Opene...	● 02/01/2018	02/01/2018	Reaume, Robert	•Send Engagement Message
Online Intake Date Date New Case is opene...	! 02/01/2018	02/06/2018	Reaume, Robert	•Send Welcome Message Send Welcome E-Mail
FN Questionnaires Submitted Electronic Questionnai...	! 02/01/2018	02/06/2018	Not Assigned	
FN Questionnaires Completed Electronic Questionnai...	● 02/06/2018	02/06/2018	Not Assigned	
Date I-130 Petition Previously Approved Approval Date of Previ...	● 02/07/2018		Not Assigned	
Date I-130 Petition Filed Concurrently (One-Step) Filing Date of Concurr...	● 02/07/2018		Not Assigned	

The Target Dates for incomplete Activities can be modified, as needed. This can be useful in situations where a certain step needs to be pushed back, when processing times fluctuate, etc.

Activity Name Description	Target Date	Date Completed	Assigned To	Receipt	Note (visible to HR)	View FN/HR	Reminder Date	Audit
Date Opened	● 01/01/2018	01/01/2018	Reaume, Robert	•Send Engagement Message	More	Y/Y Required		
Online Intake Date Date New Case is opene...	● 01/03/2018	01/03/2018	Reaume, Robert	•Send Welcome Message Send Welcome E-Mail	More	Y/Y [Delete]		
FN Questionnaires Submitted Electronic Questionnai...	● 01/03/2018	01/03/2018	Reaume, Robert		More	Y/Y [Delete]		
FN Questionnaires Completed Electronic Questionnai...	● 01/08/2018	01/08/2018	Reaume, Robert		More	Y/Y [Delete]		
Date I-130 Petition Pre Approval Date of Previ...	! 01/22/2018	02/11/2018	Rodriguez, Cynthia					
Date I-130 Petition File Filing Date of Concurr...								
Affidavit of Support Ser Affidavit of Support p...		● 02/12/2018	Reaume Robert					
All FN Docs Received All Required Documents...		● 02/22/2018	Reaume Robert					
Signed Affidavit of Supp Signed Affidavit of Su...								
AOS Application Prepared Forms and Supporting D...	! 01/22/2018	02/11/2018	Rodriguez, Cynthia		More	Y/Y [Delete]		
AOS Application Filed Prepared and Signed AO...	! 01/23/2018		Reaume Robert	•Send Application Filed Message •DOL Processing Times	More	Y/Y [Delete]		
Receipt Date Receipt Date as Entere...	! 02/01/2018		Reaume Robert	USCIS Upload	More	Y/Y [Delete]		
Biometrics Appt. Date Notice of Biometric Ap...	● 02/15/2018		Not Assigned	•Send Receipt # Received Message •Send Message: Biometrics Appt Date	More	Y/Y [Delete]		

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.

Target Dates for prior Activities or completed Activities will not be adjusted.

Assigned To	Receipt	Note (visible to HR)	View FN/HR	Reminder Date	Audit
Reaume, Robert	•Send Engagement Message	<input type="text"/> More	Y/Y Required		
Reaume, Robert	•Send Welcome Message Send Welcome E-Mail	<input type="text"/>	Y/Y [Delete]		

Activity Assignment

The **Assigned To** column is used to assign an Activity to a specific user who will be responsible for completing that Activity.

Assignments for incomplete Activities can be changed at any time from within a particular process, regardless of whether a default was defined from the **Administrative Settings**.

All users will be available for assignment, even if they are not directly assigned to the process.

FN/Individual / Abbott, James Vern (123456789) / Processes Forms

(A# 123456789) [AOS Family] RJR/RJR/-/-/ Case pending, DO NOT TRAVEL

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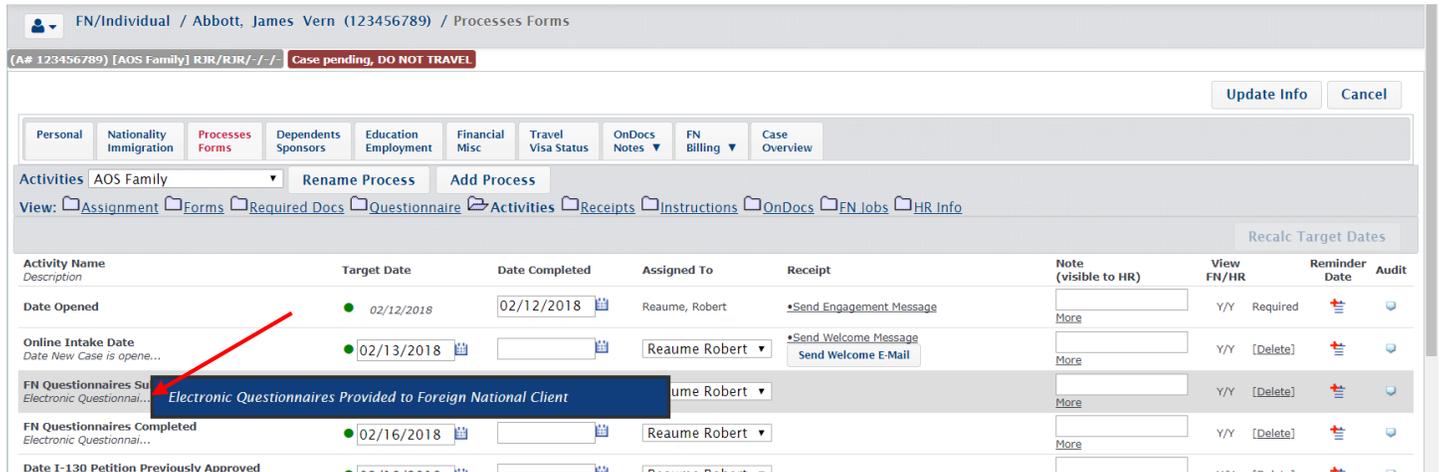
Activities AOS Family Rename Process Add Process

View: Assignment Forms Required Docs Questionnaire Activities Receipts Instructions OnDocs FN Jobs HR Info

Activity Name	Target Date	Date Completed	Assigned To	Receipt
Date Opened Date New Case is Opened...	● 02/06/2018	02/06/2018	Reaume, Robert	•Send Engagement Message
Online Intake Date Date New Case is opened...	● 02/07/2018	<input type="text"/>	Reaume Robert Not Assigned Hernandez Trainer Reaume Robert Rodriguez, Cynthia Not Assigned	•Send Welcome Message Send Welcome E-Mail
FN Questionnaires Submitted Electronic Questionnai...	● 02/07/2018	<input type="text"/>		
FN Questionnaires Completed Electronic Questionnai...	● 02/12/2018	<input type="text"/>		

Activity Descriptions

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



The screenshot shows a user interface for a case management system. At the top, there is a breadcrumb trail: "FN/Individual / Abbott, James Vern (123456789) / Processes Forms". Below this, a status bar indicates "(A# 123456789) [AOS Family] RJR/RJR/-/-/- Case pending, DO NOT TRAVEL". There are "Update Info" and "Cancel" buttons. A navigation menu includes "Personal", "Nationality Immigration", "Processes Forms", "Dependents Sponsors", "Education Employment", "Financial Misc", "Travel Visa Status", "OnDocs Notes", "FN Billing", and "Case Overview". Below the menu, there are tabs for "Activities", "Assignment", "Forms", "Required Docs", "Questionnaire", "Receipts", "Instructions", "OnDocs", "FN Jobs", and "HR Info". A "Recalc Target Dates" button is also present. The main area is a table with the following columns: "Activity Name Description", "Target Date", "Date Completed", "Assigned To", "Receipt", "Note (visible to HR)", "View FN/HR", "Reminder Date", and "Audit". The table contains several rows of activity data. A red arrow points to the "FN Questionnaires Submitted" row, which has a tooltip that reads "Electronic Questionnaires Provided to Foreign National Client".

Activity Name Description	Target Date	Date Completed	Assigned To	Receipt	Note (visible to HR)	View FN/HR	Reminder Date	Audit
Date Opened	02/12/2018	02/12/2018	Reaume, Robert	•Send Engagement Message	More	Y/Y	Required	
Online Intake Date Date New Case is opene...	02/13/2018		Reaume Robert	•Send Welcome Message Send Welcome E-Mail	More	Y/Y	[Delete]	
FN Questionnaires Submitted Electronic Questionnai...			Reaume Robert		More	Y/Y	[Delete]	
FN Questionnaires Completed Electronic Questionnai...	02/16/2018		Reaume Robert		More	Y/Y	[Delete]	
Date I-130 Petition Previously Approved			Reaume Robert			Y/Y	[Delete]	

Additional Support

If you're an existing Edge user and have any additional questions about the setup process or the use of **Enhanced Activities**, or would like to have the feature enabled for your site, please reach out the LawLogix Customer Support team.