VIZUAL PLATFORM

Vizual Pro - User Guide

Handy tips and Instructions for Users

Definition

OBJECTIVES

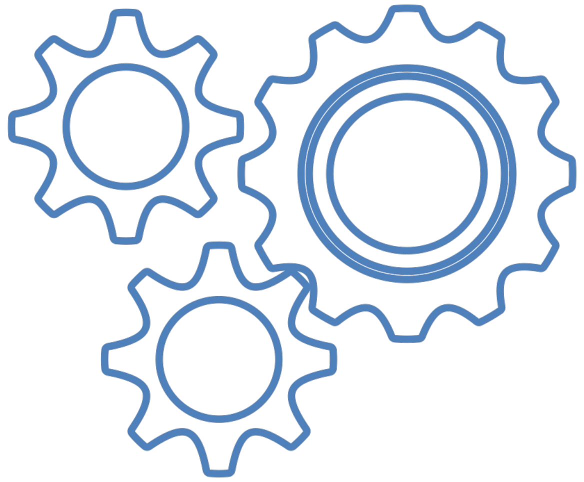
Goals that inspire and set direction

- *Where do I need to go?*
- *Think of it as a point on a map, a destination like Boston*

KEY RESULTS

Steps that measure progress towards an objective

- *How do I know I'm getting there?*
- *Think of it as a signpost with a distance marker.*



TASKS/ INITIATIVES

Tasks required to drive progress of key results

- *What will I do to get there?*
- *Think of it as a description of what you'll do to get to your destination.*

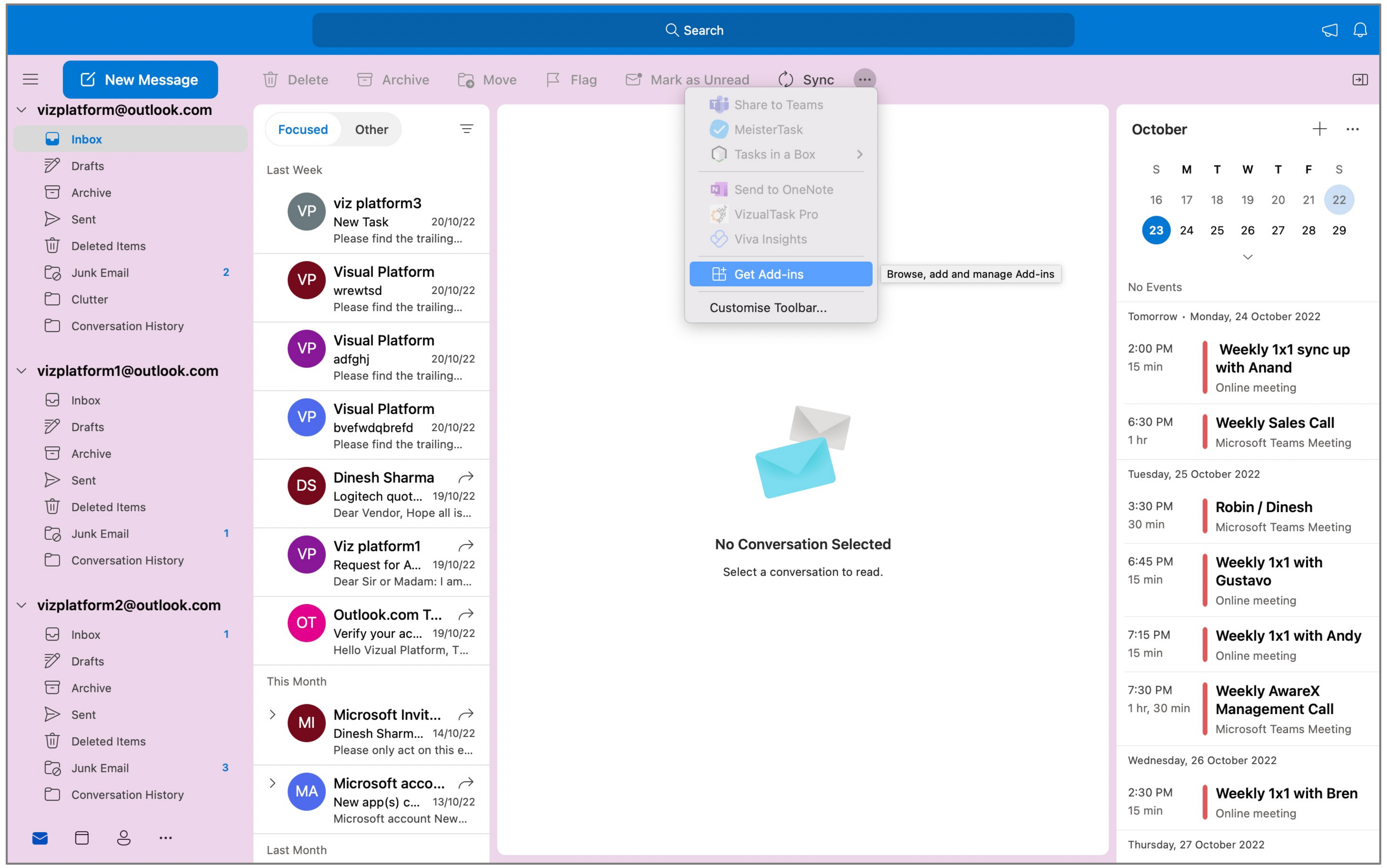
Handy tips and Instructions for Users

1 How to 'Install' Vizual Pro

1.1. Goto Microsoft **Outlook** using a client App or Browser or Mobile App

1.2 Click on 'The ellipsis' at the top right-hand side

1.3 Click on **Get Add-ins**

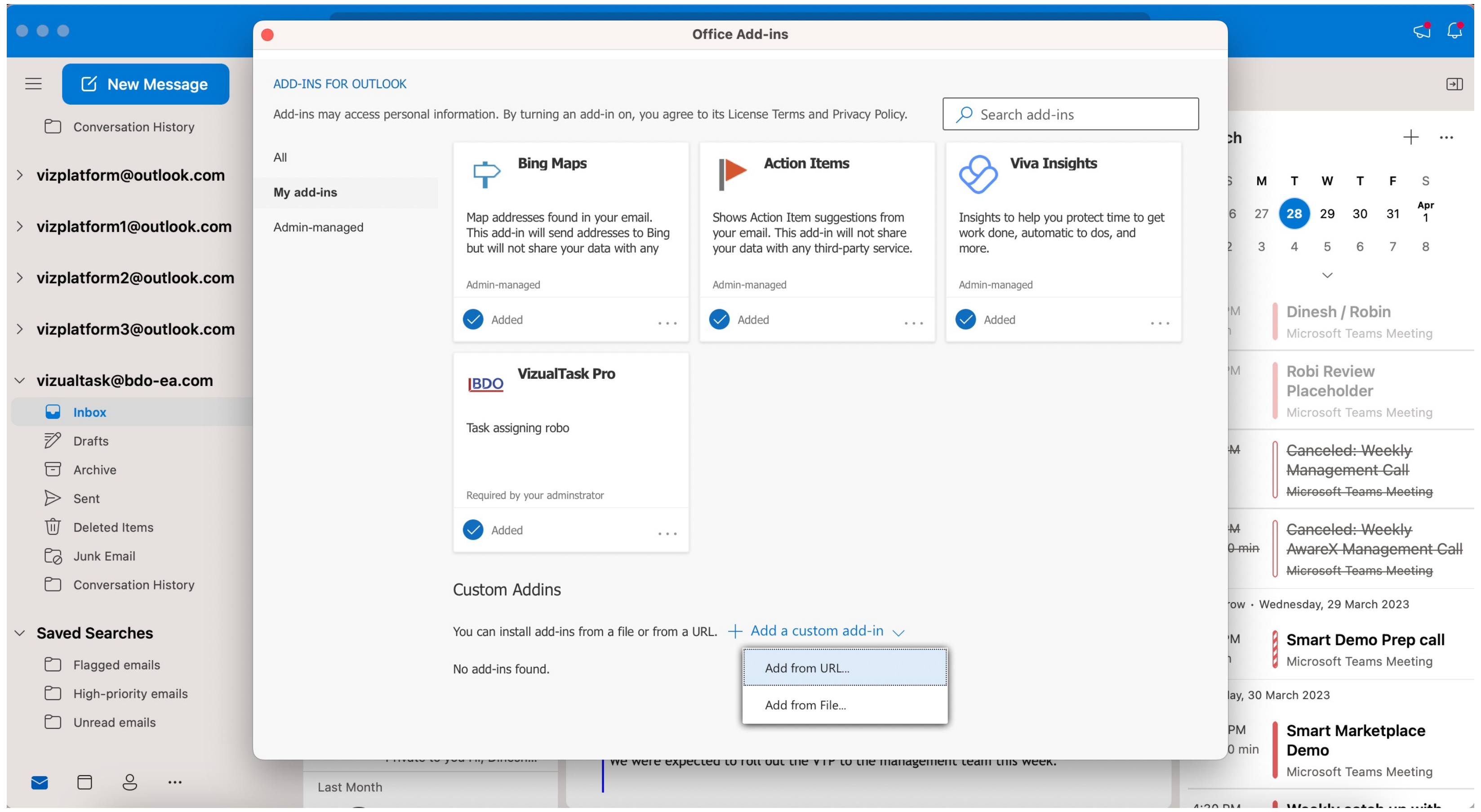


1.4. Click on ' **My Add-Ins'**

1.5 Click on **'Custom Add-ins'**

1.6 Click on '**+ Add a custom add-in'**

1.7 Click on 'Add from URL'

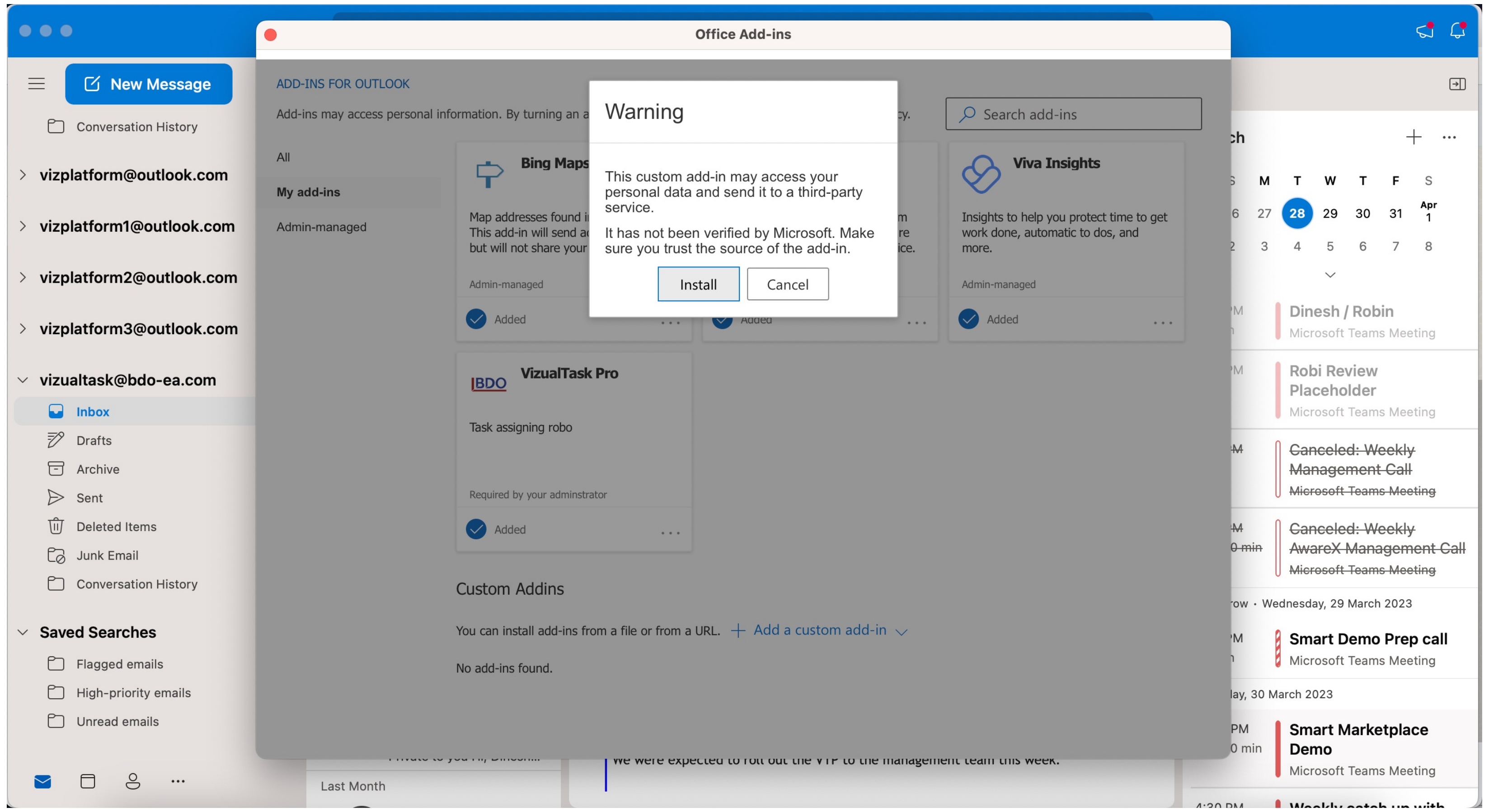


1 How to ‘Install’ Vizual Pro

1.8 Enter the URL
https://vizualpro.app/asrfnx80lkae8ks9kdl01yemde/manifest-swaca7s.xml

1.9 Click on **‘Install’**

1.10 Once the **installation is successful**, close the window

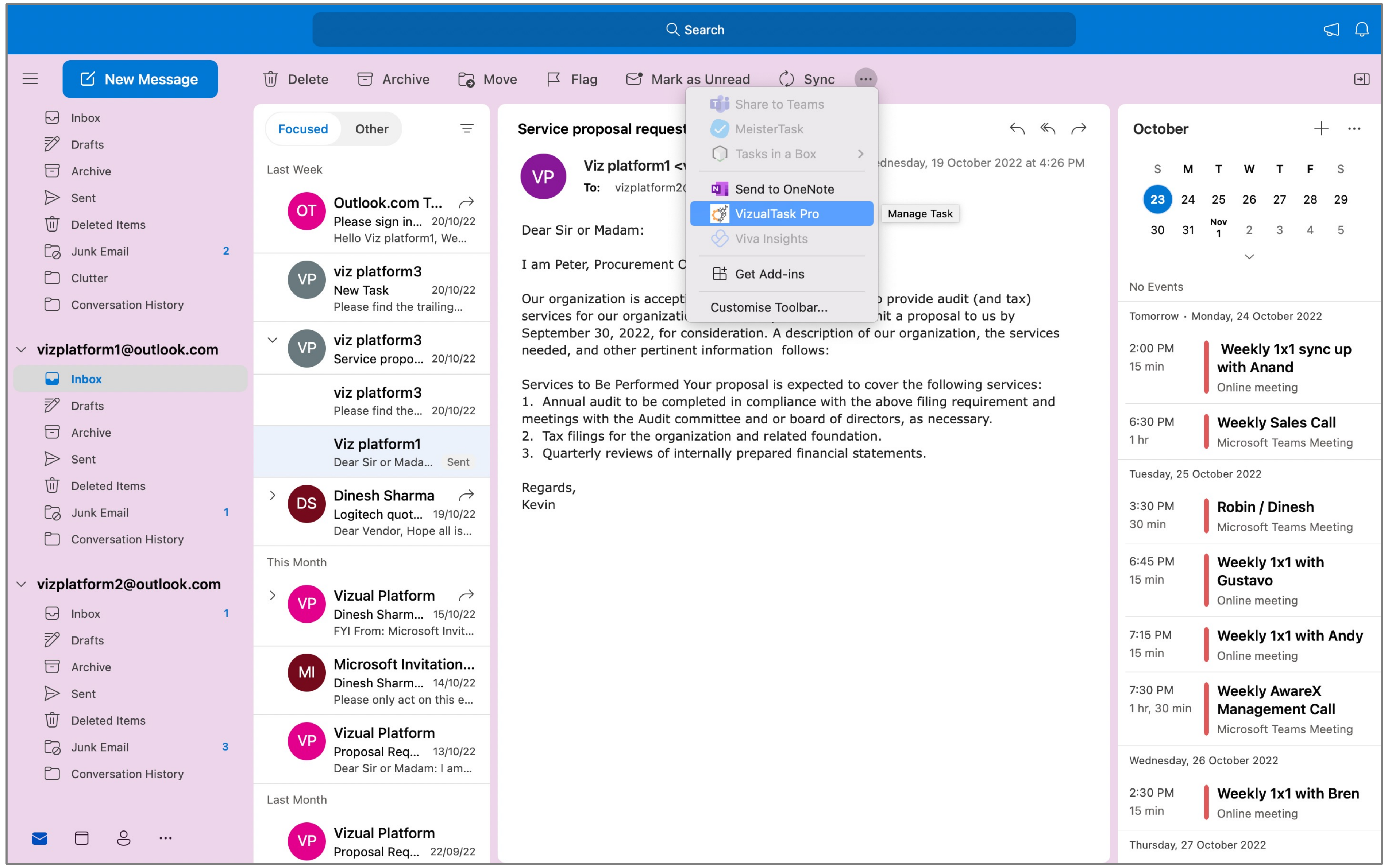


2 How to create a ’New Task which is linked to any emails’ in Vizual Pro

2.1 Access **‘Vizual Pro’ Add-In**

2.2 Go to **‘Inbox’** and click on **‘One of the emails’**

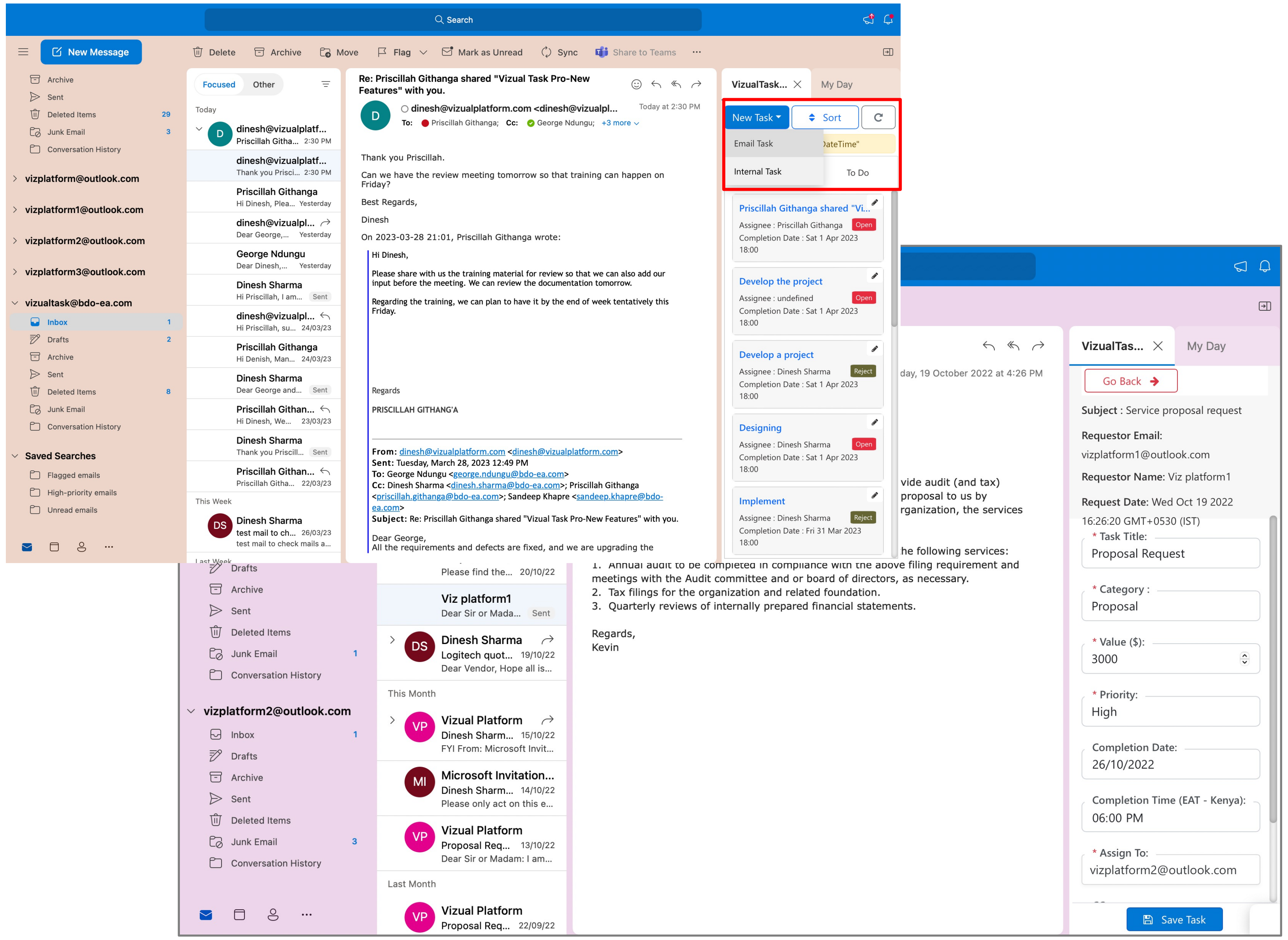
2.3 Click on The ellipsis’ at the top right-hand side and select **‘Vizual Pro’**



2.4 Click on ’ **New Task’**

2.5. Select ‘Email Task’

2.5 Enter all the inputs and click on **‘Save Task’**

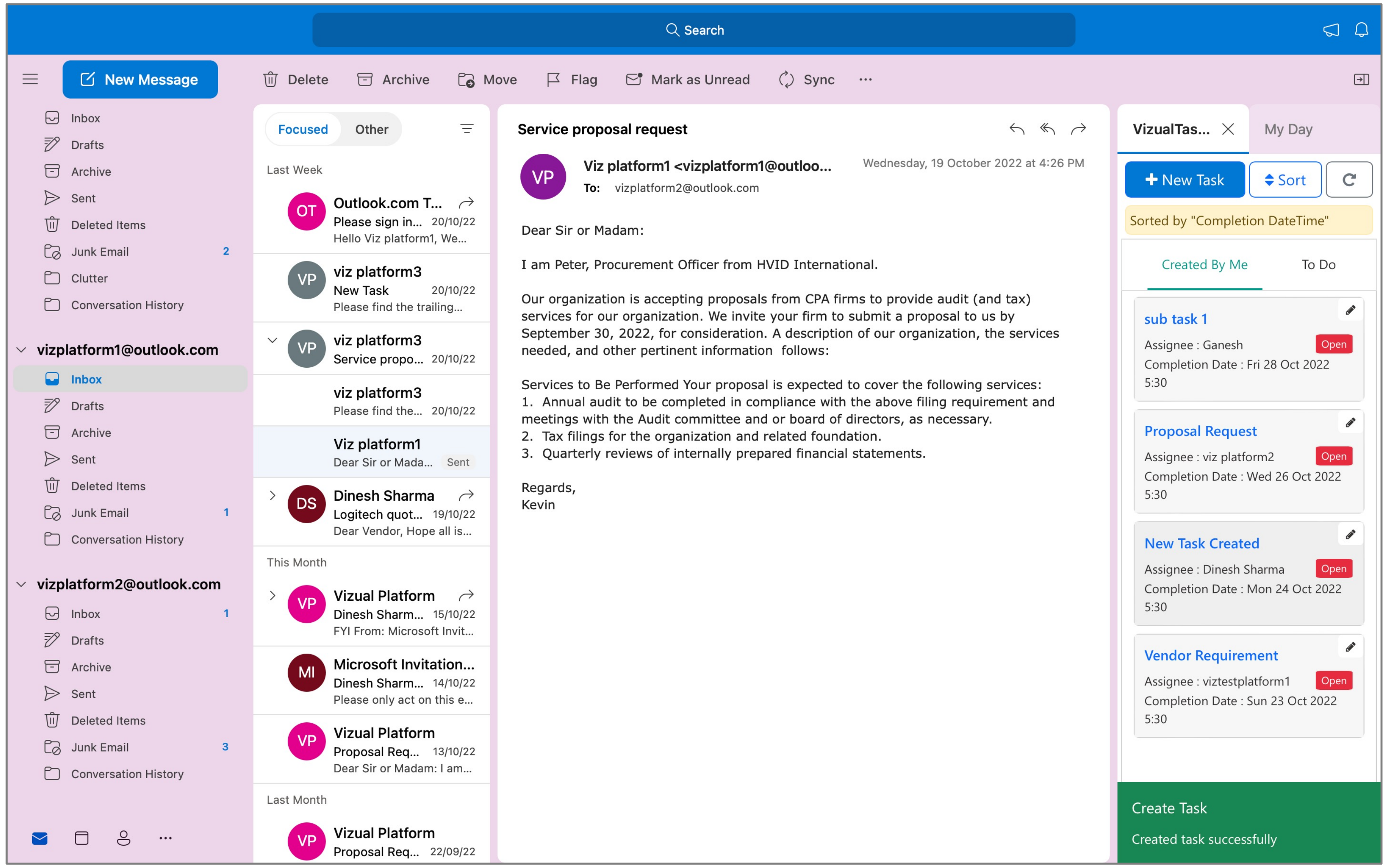


3 What happens when a ' Task' linked to Email gets created in Vizual Pro

3.1 See the confirmation message 'Task created successfully.

3.2 The system also forwards the specific email on which the task is created to

- Task assignee
- People (emails copied) in CC field



3.3 Task details are populated into database

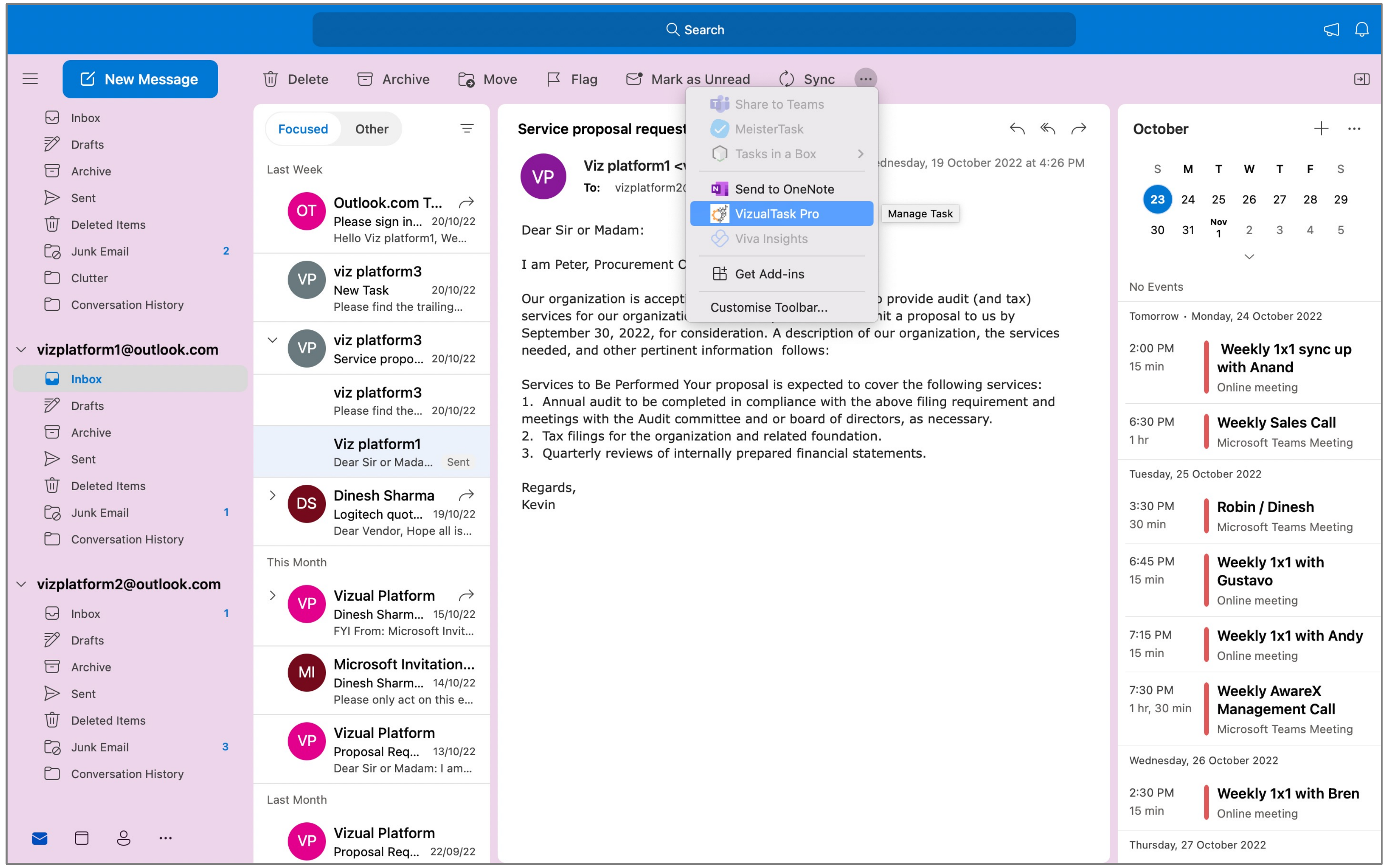
3.4 Email trails are populated into database

4 How to create a ’New Task which is internal and not linked to any emails’ in Vizual Pro

2.1 Access **‘Vizual Pro’ Add-In**

2.2 Go to **‘Inbox’** and click on **‘One of the emails’**

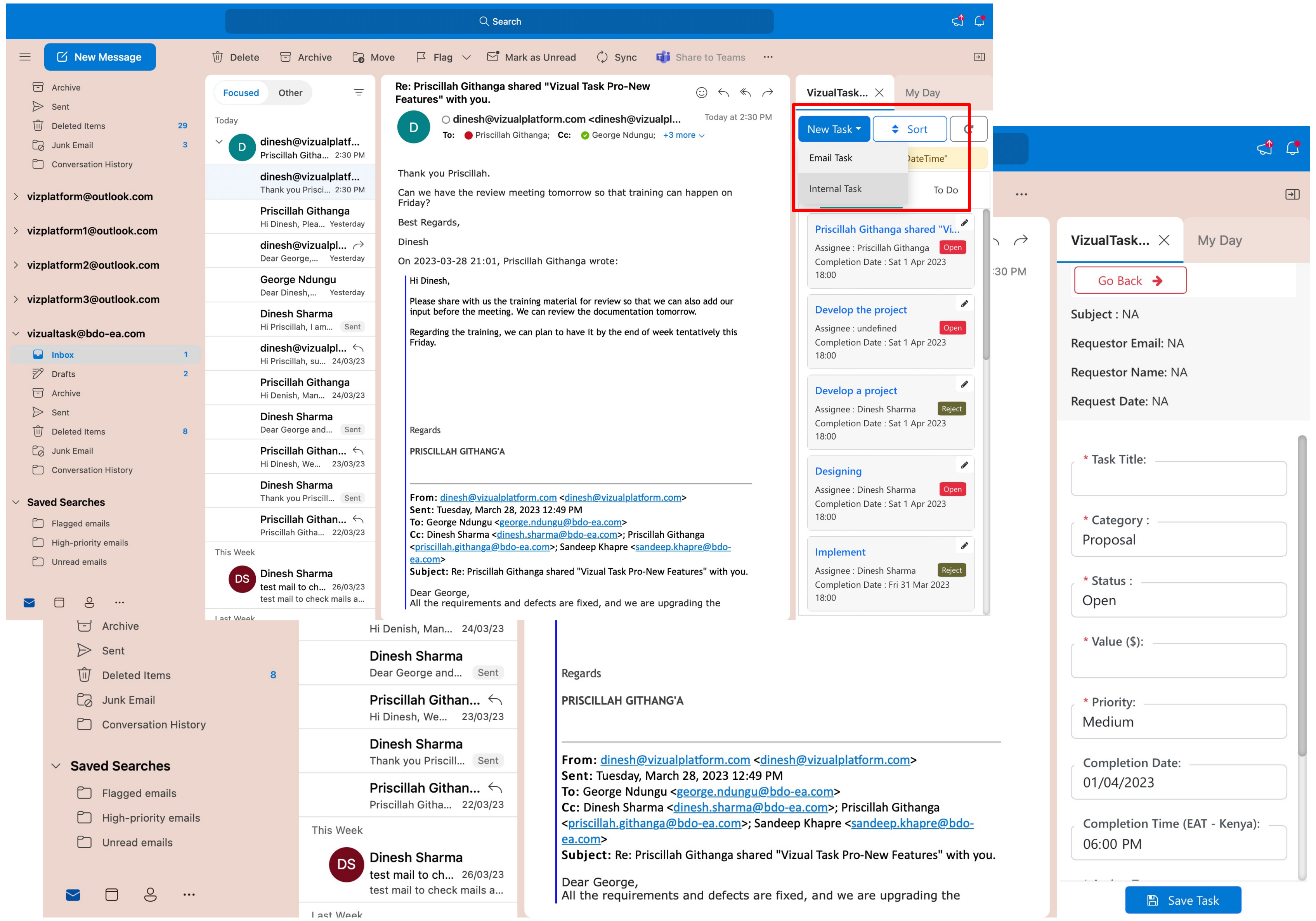
2.3 Click on The ellipsis’ at the top right-hand side and select **‘Vizual Pro’**



2.4 Click on **’ New Task’**

2.5. Select ‘Internal Task’

2.5 Enter all the inputs and click on **‘Save Task’**



5 What happens when a ’ Task’ not linked to Email gets created in Vizual Pro

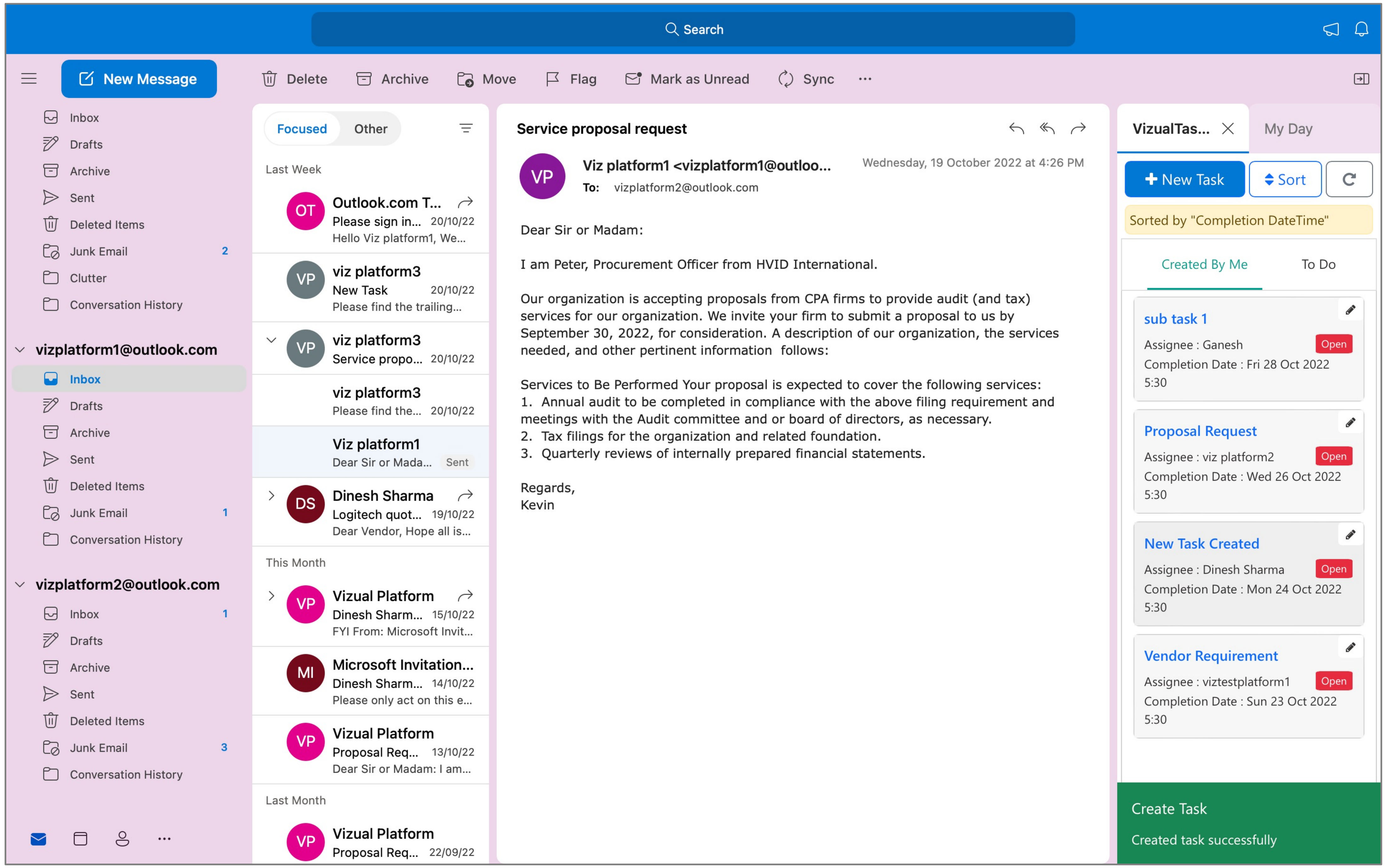
3.1 See the confirmation message ‘Task created successfully.

3.2 The system also generates an email content based on the task title, task comments and forwards that generated email to

- Task assignee
- People (emails copied) in CC field

3.3 Task details are populated into database

3.4 Email trails are populated into database



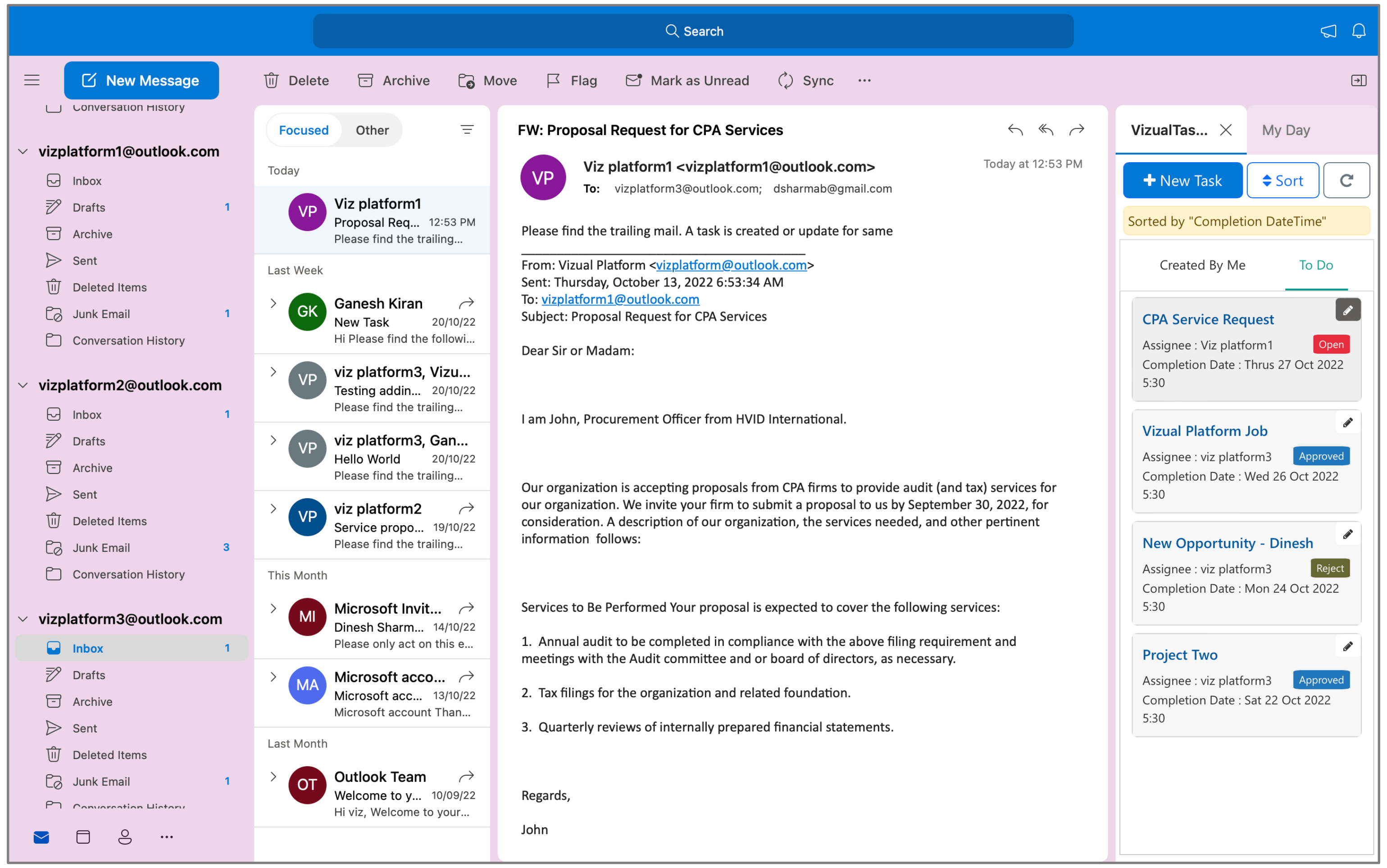
6 How to update the Task status in 'Vizual Pro' and Login to 'Vizual Pro' server console

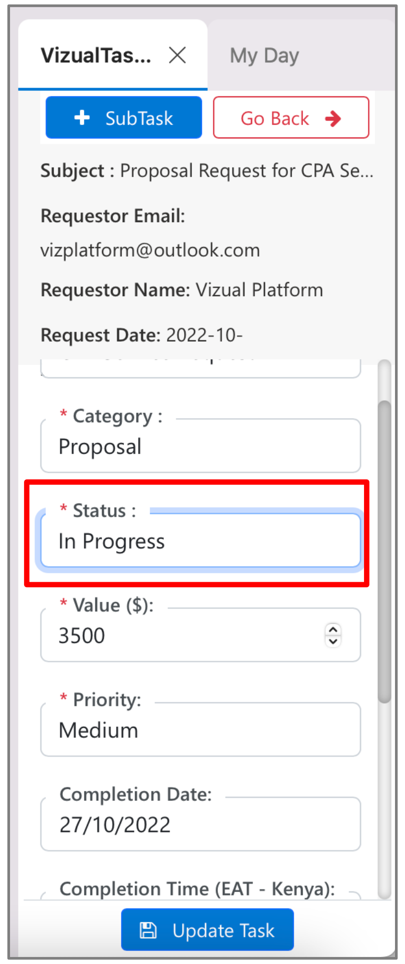
4.1 Task details are visible at **outlook Add-In** both for

- **Assigner**
- **Assignee**

4.2 Status update

- Task status can be updated from the **outlook Add-In**
- Once the task is assigned, the task status is **'Open'**
- The other status can be **Review, In progress, Reject, Done, Approved**

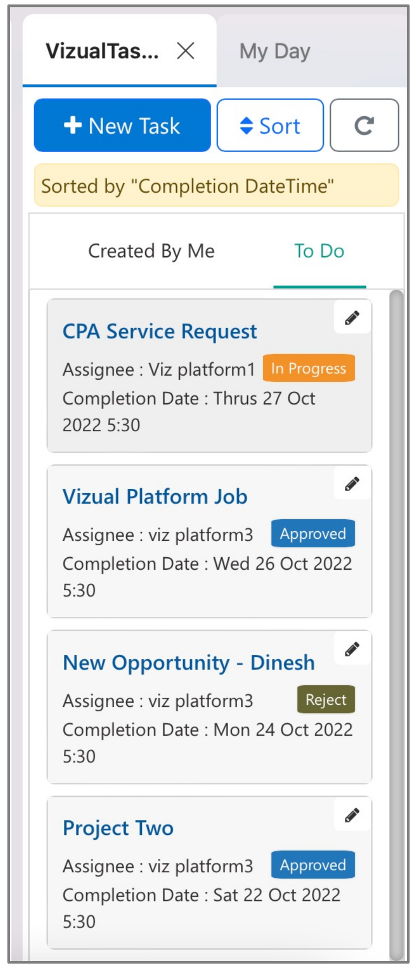


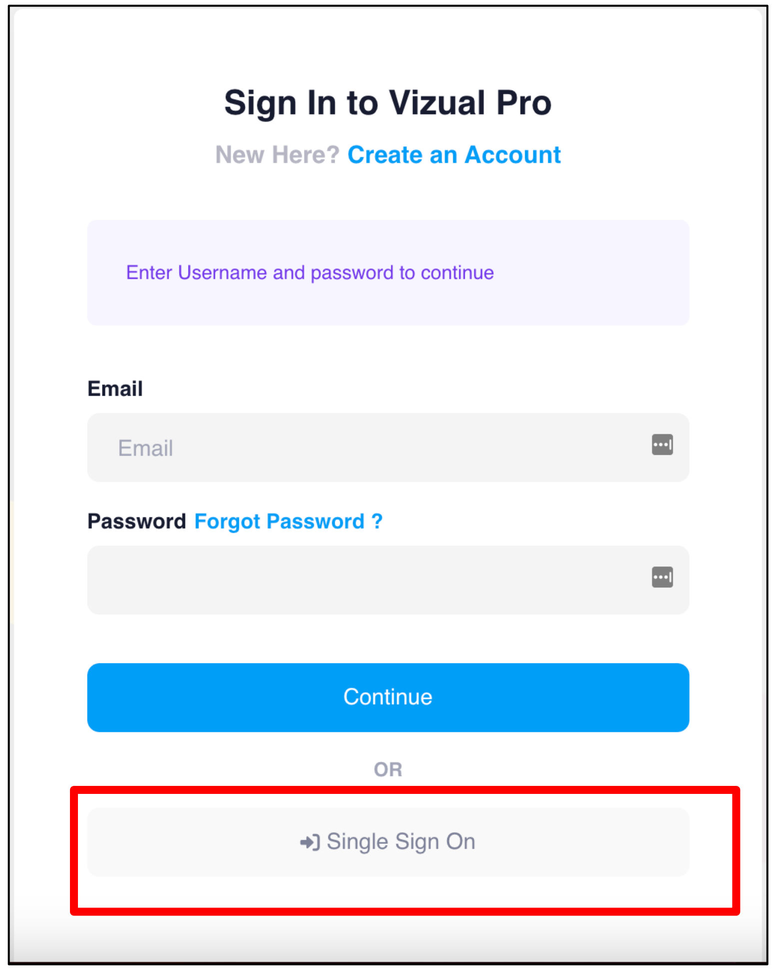


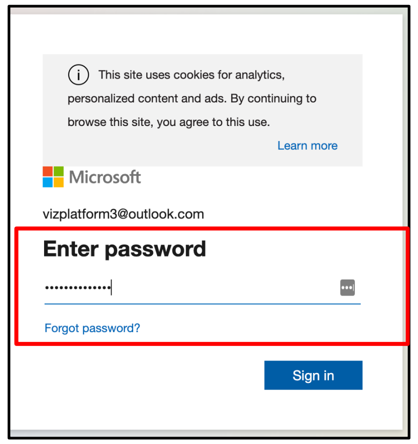
4.3 Go to **'Vizual Pro server console'** by clicking on any of the **Task title from the Outlook Add-In**.

4.4 Email exchange on that topic gets recorded in the system and it can be viewed from the **Vizual Pro server console**

4.5 Login to 'Vizual Pro' server console with your **Outlook credentials. Click on 'Single Sign On'**



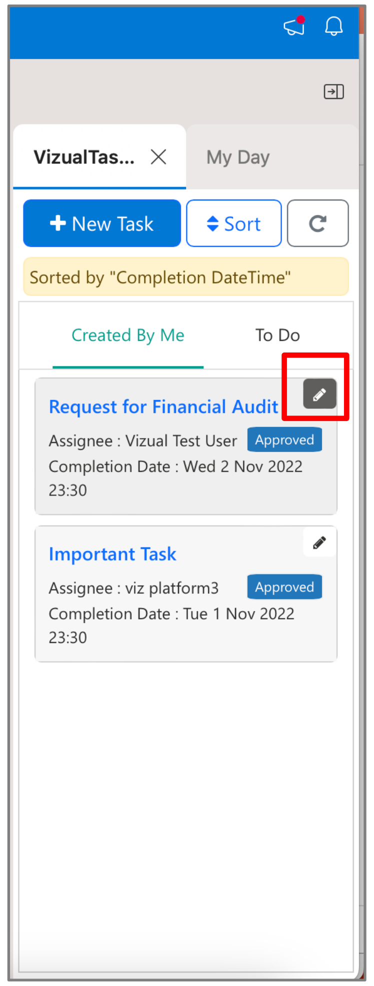


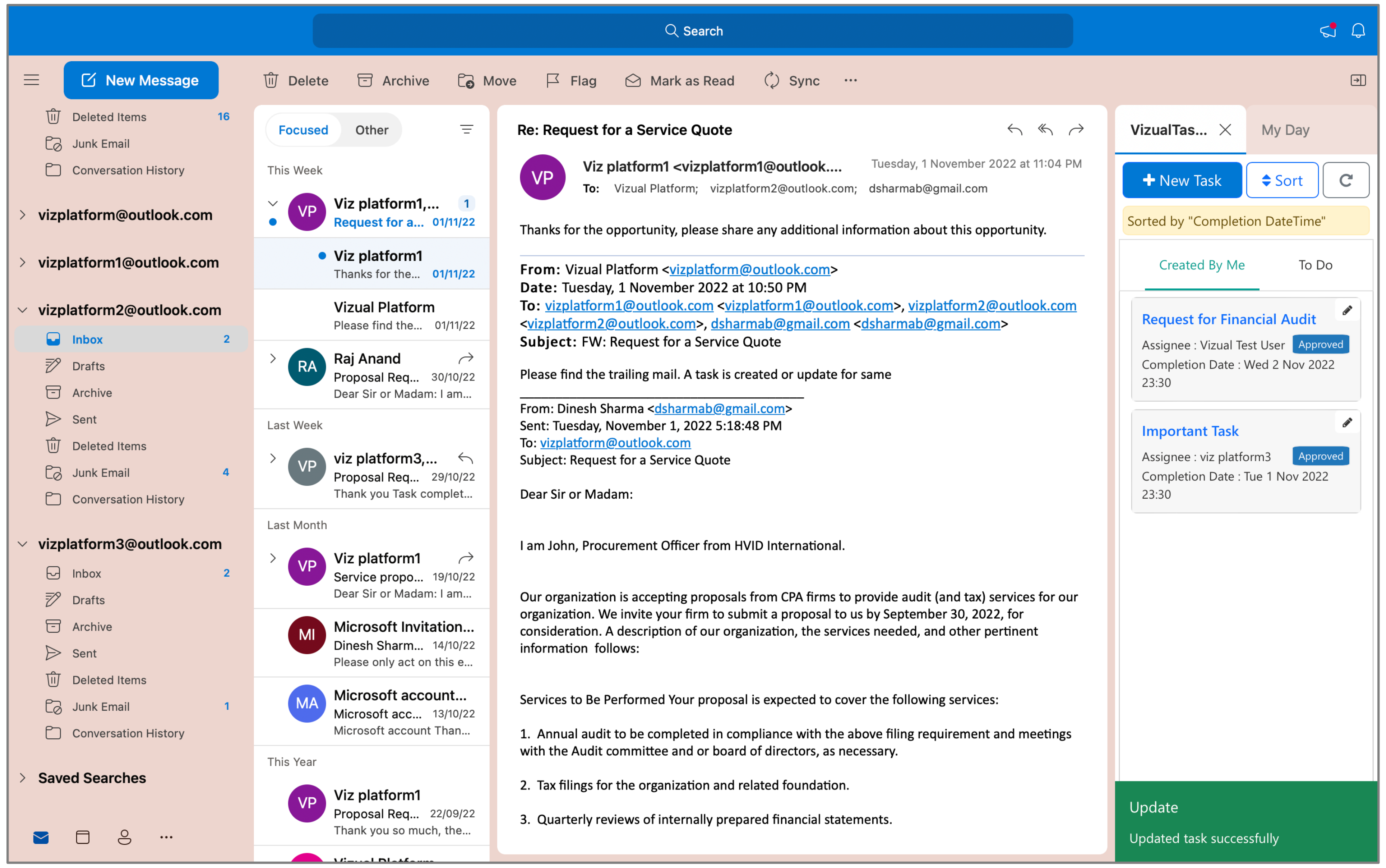


7 How to update Task with Email Trails

5.1 Email interactions or email exchanges between assignor and assignee can be updated in database by clicking on **'Update Task'**

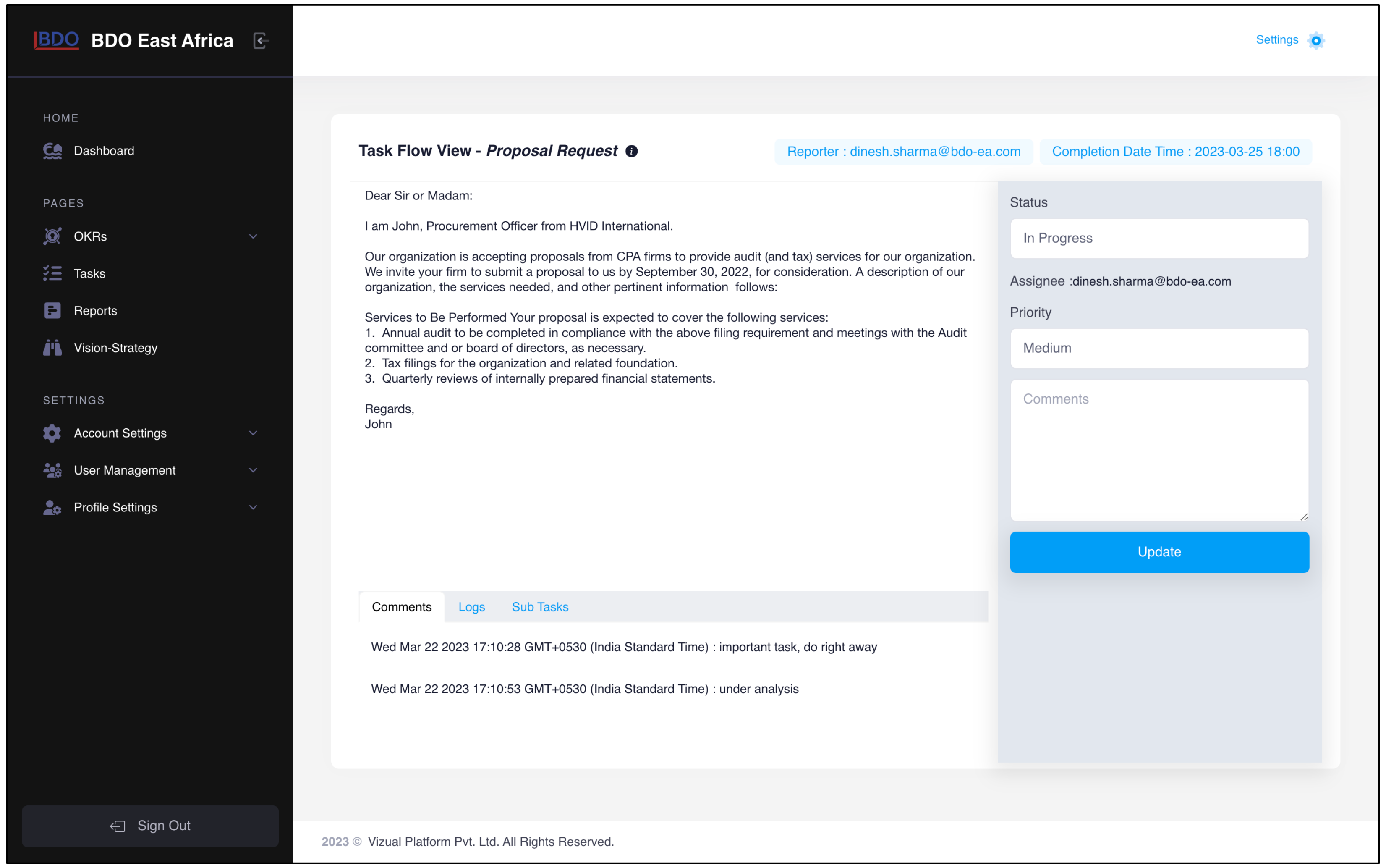
5.2 Click on **Edit Task Icon** as highlighted with Red color border and click on **'Update Task'**





5.3 All the email interactions/exchanges are recorded in the Database

5.4 The interactions can be viewed anytime by going through the Task report



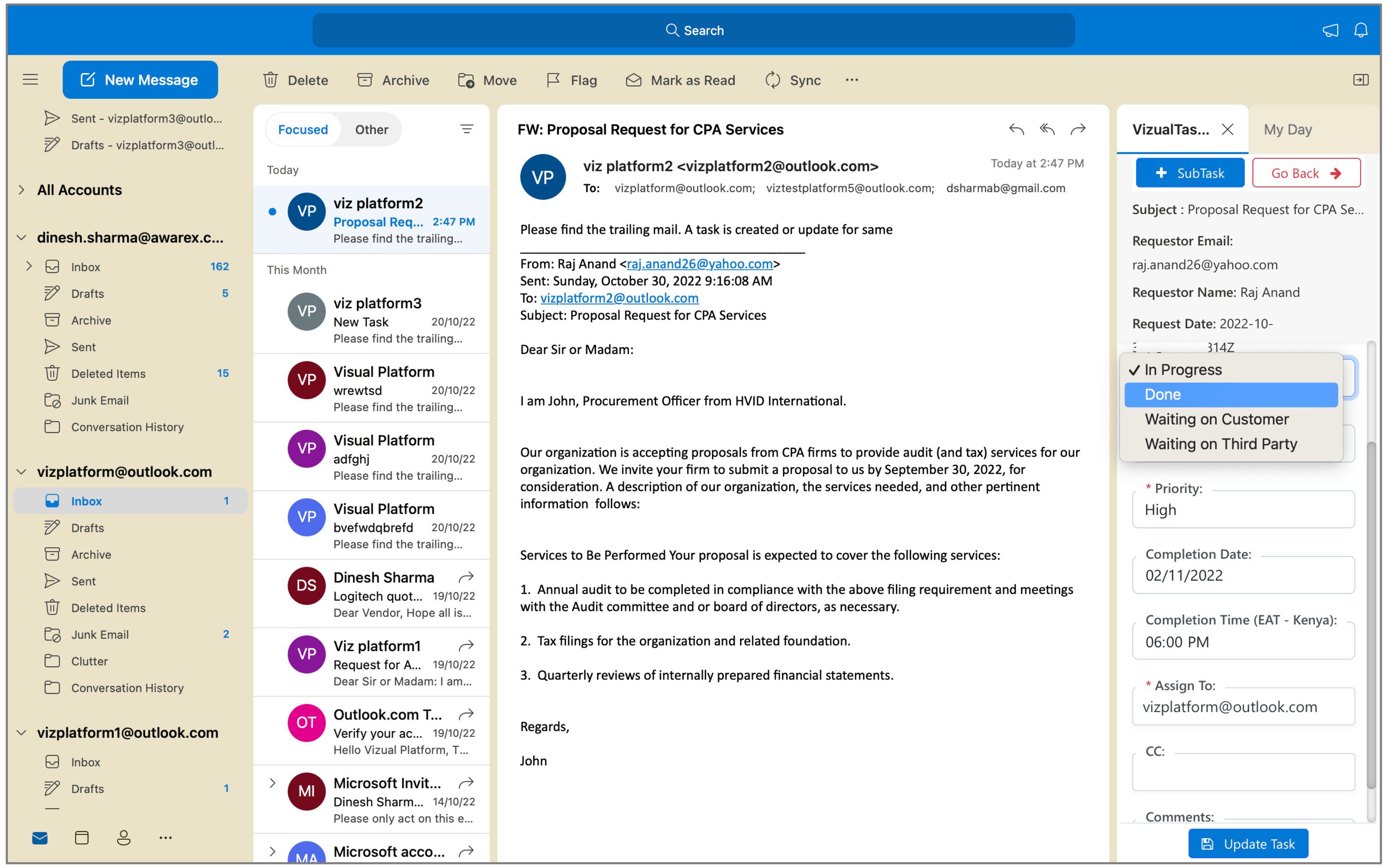
6 How to mark Task as Done and Approved?

6.1 Task details are visible at **outlook Add-In** both for

- **Assigner**
- **Assignee**

6.2 Mark status as DONE

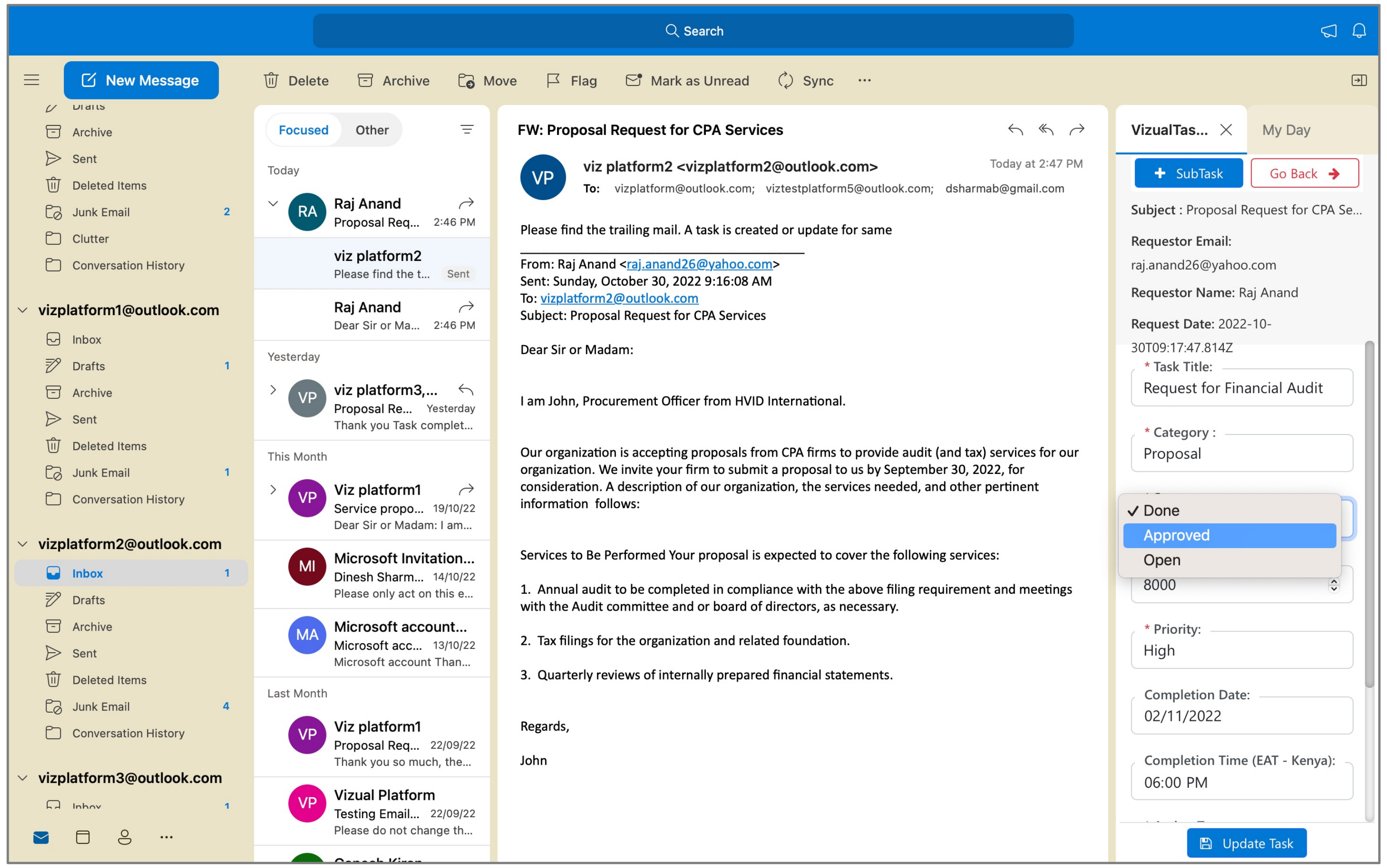
- Task assignee, once task is completed mark as DONE. However, Task assignee cannot mark a task as APPROVED.



6.3 Only the Task assignor can mark the **status as APPROVED**

6.4 As a Task **Assignor**, he can goto the ‘Created by Me’ section of Add-In and update the task status as **‘APPROVED’**

6.5 Click on **‘Update Task’.**

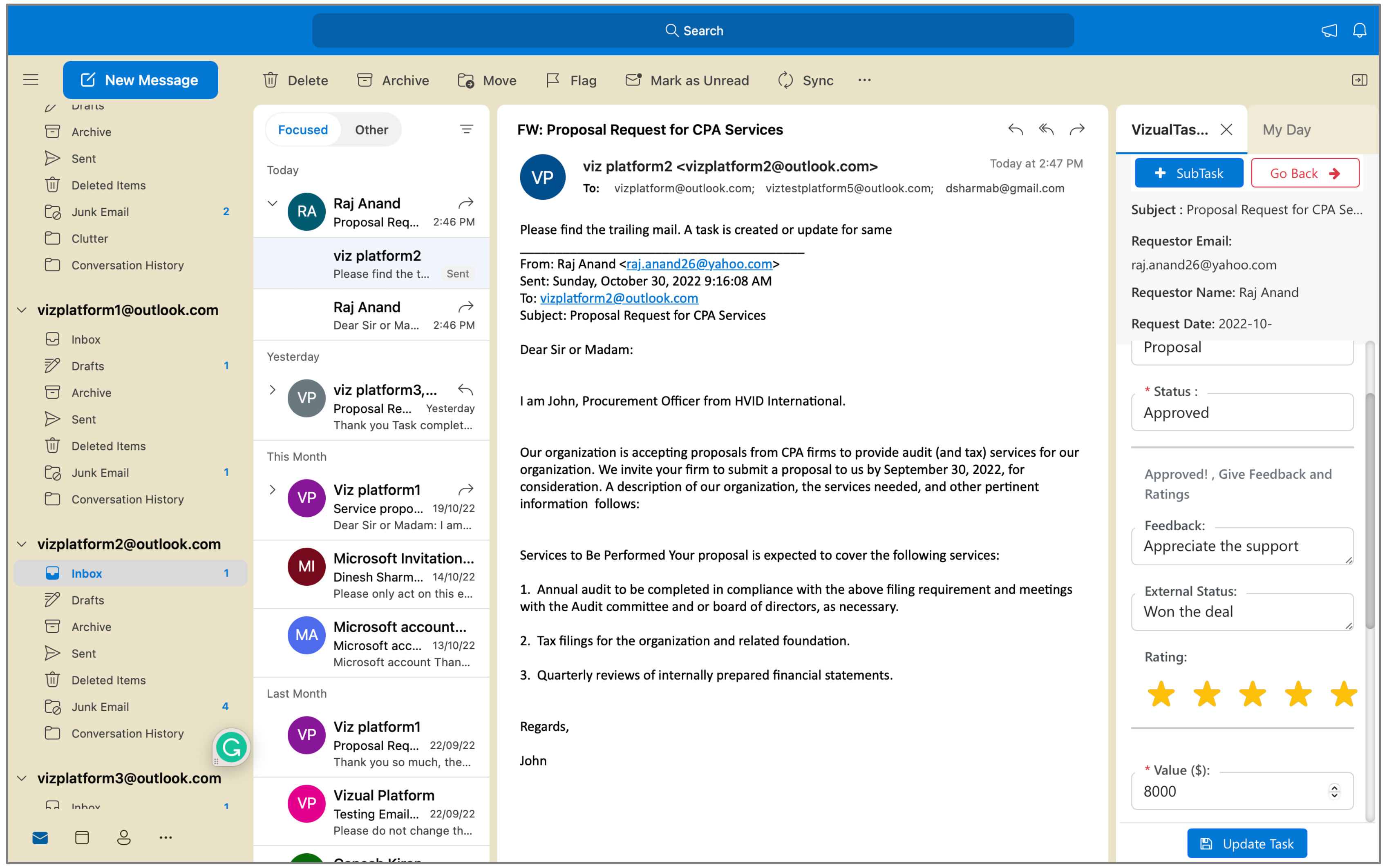


7 Giving Rating and Feedback on the Task and update Task External Status?

7.1 The Task Assignor, can mark the task as APPROVED.

7.2 The task can be marked as APPROVED provided the task status as DONE

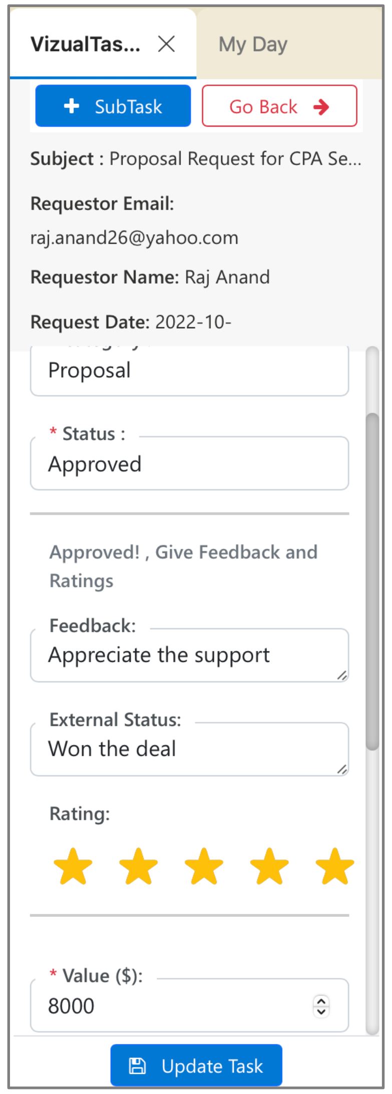
7.3 The Assignor can also reopen the task

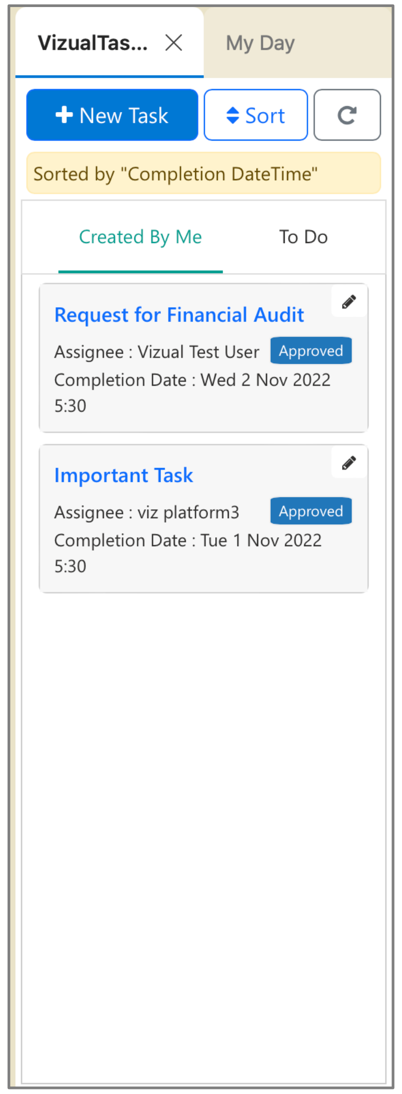


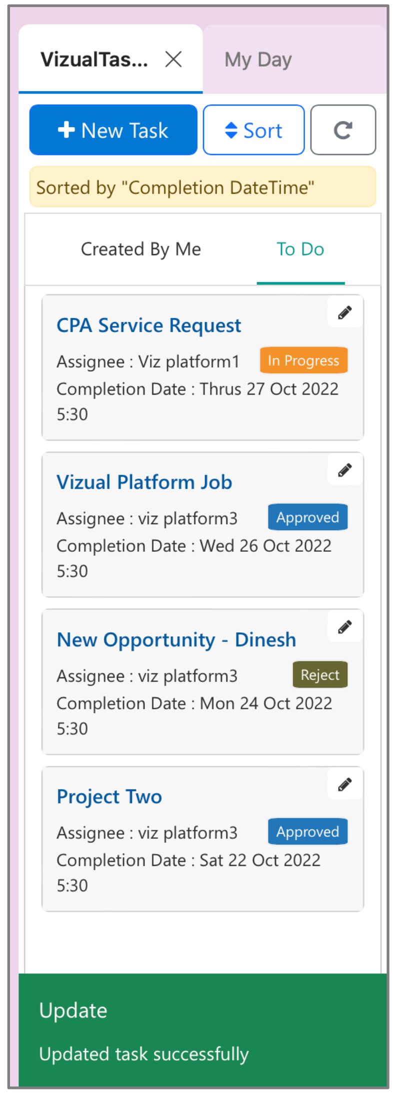
7.3 Only the Task assignor can mark the **status as APPROVED**

6.4 As a Task **Assignor**, he can go to the ‘Created by Me’ section of Add-In and update the task status as **‘APPROVED’**

6.5 Click on **‘Update Task’.**





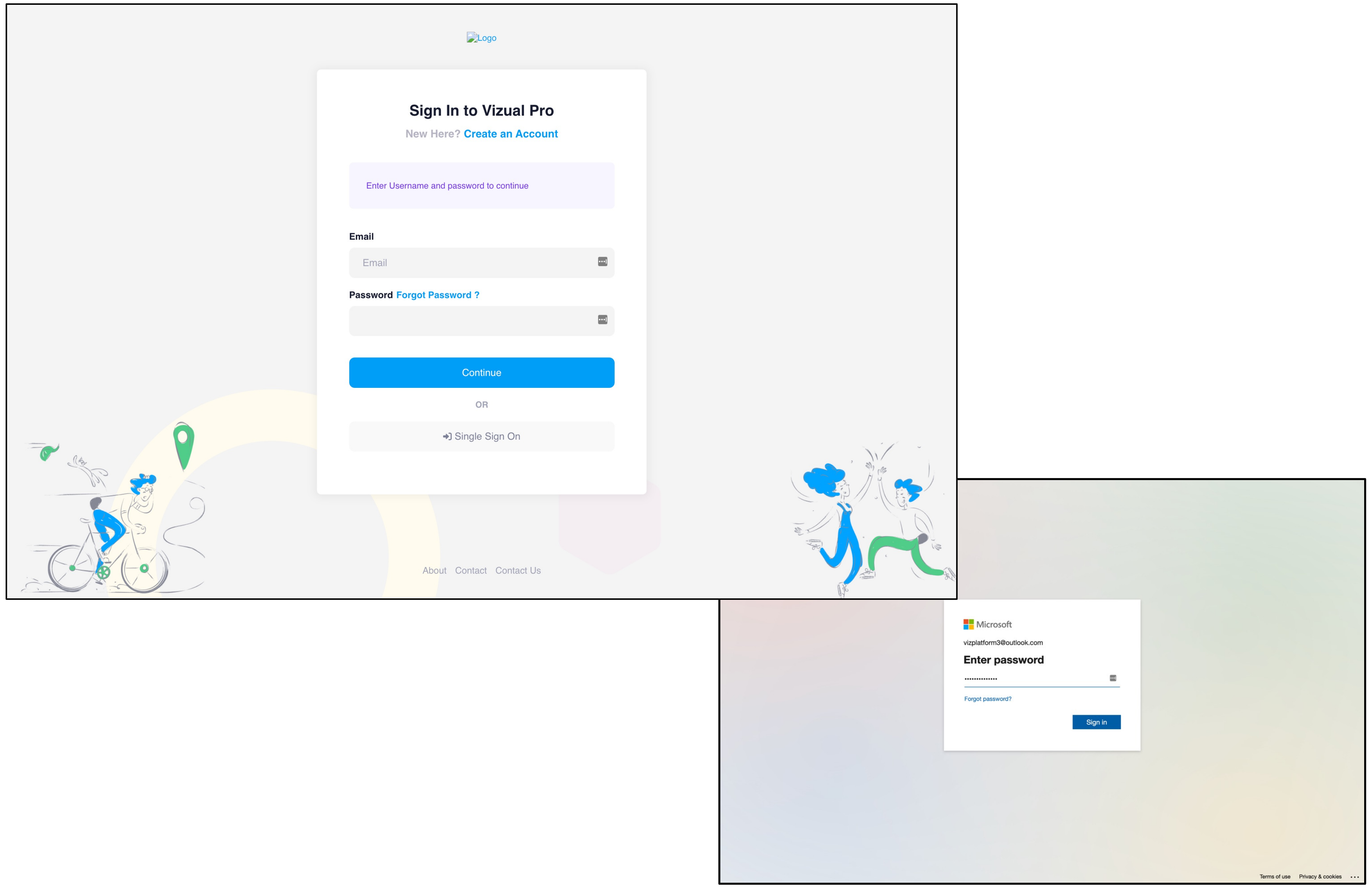


8 Dashboard – Executive and Individual Level

8.1 Login to the ’Vizual Pro’ console by clicking on any of the titles of **‘Vizual Pro Outlook Add-in’**

8.2 You will get **a Sign-In option**

- Enter **Microsoft Login** credentials

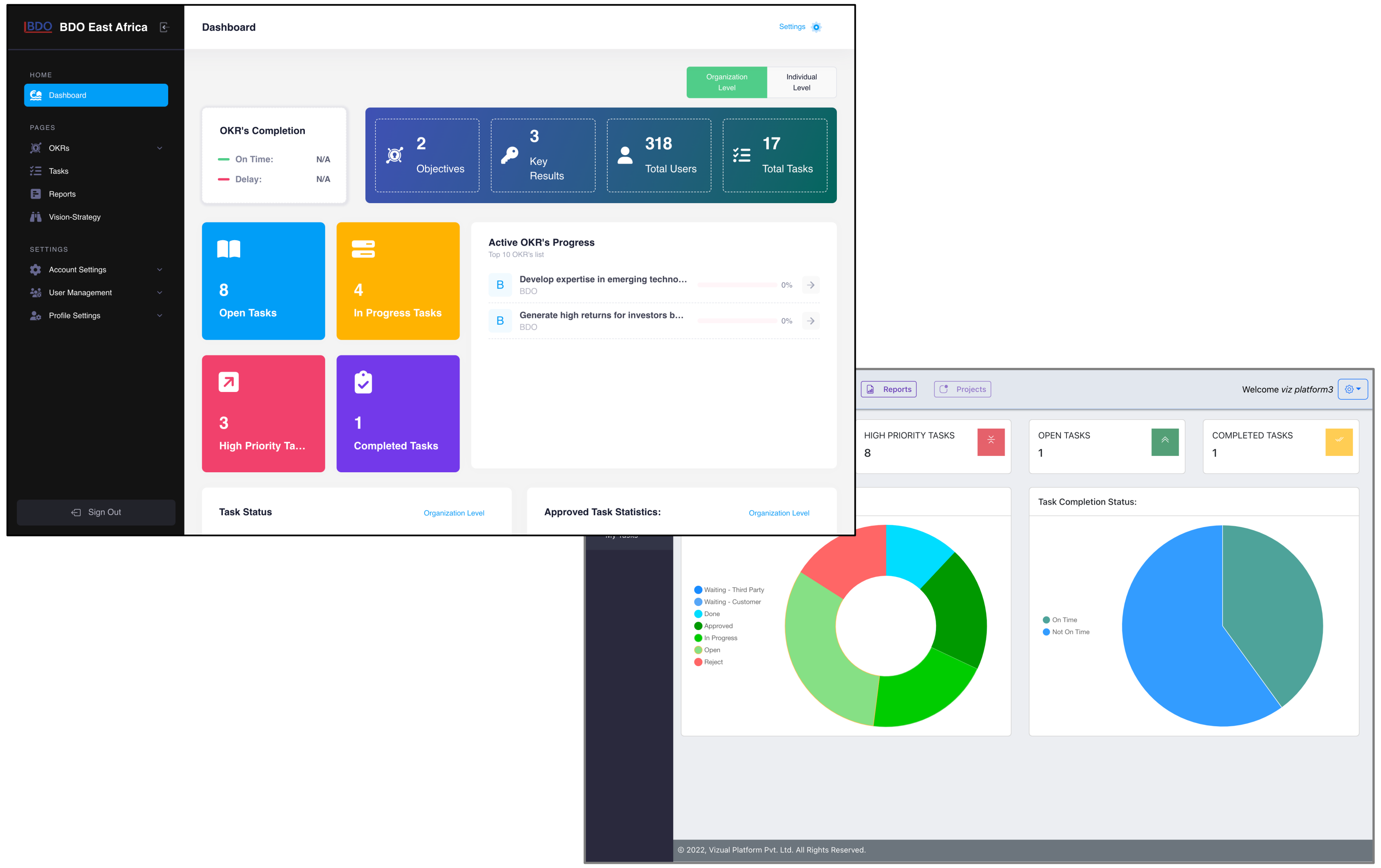


8.3 By default the user will be navigated to **‘Dashboard’** and **Organization Level**

8.4 The Organization level dashboard provides various details like

- Task Status, Task completion status, Number of Tasks in various statuses like In progress, high priority, open, completed etc.

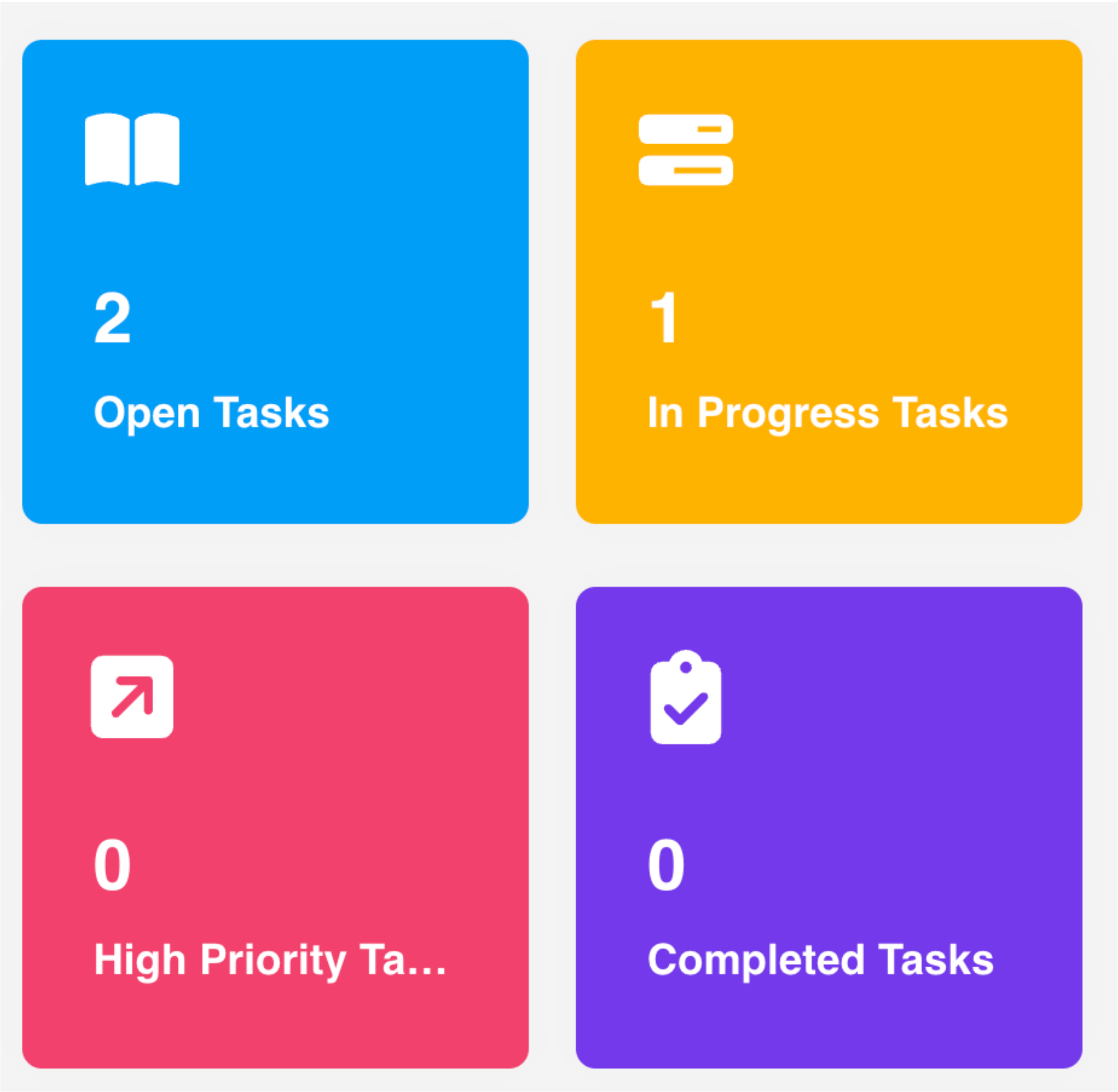
8.5 Only users with Executive role privileges can see this report

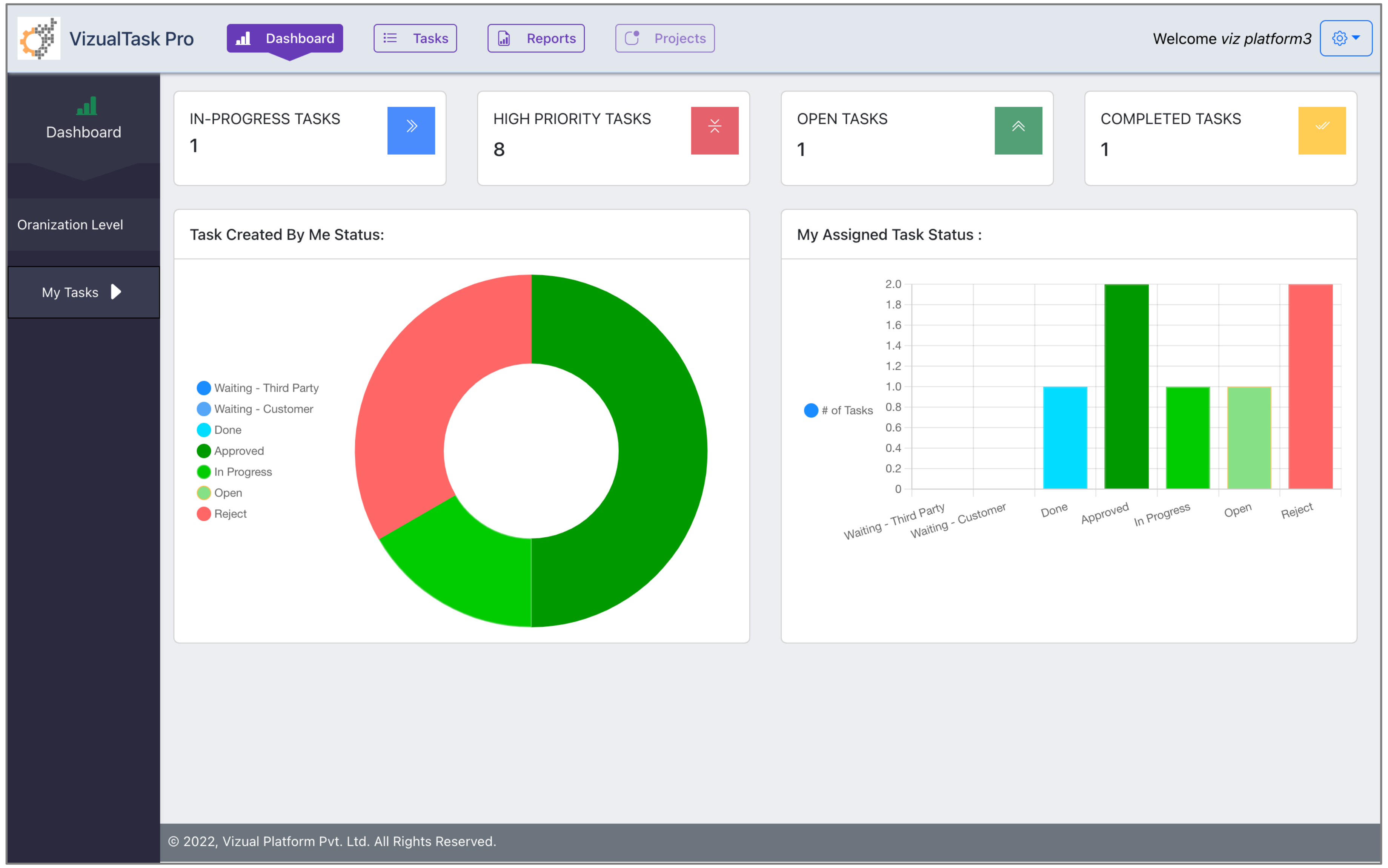


9 Dashboard – My Tasks – Individual level Task reports

9.1 Login to the **’Vizual Pro’** console
This view of the dashboard is accessible to all the individuals in the organization

9.2 Go to **‘My Tasks’** under **Dashboard**
This view provides a view of my (the person who logged in to console) task performance



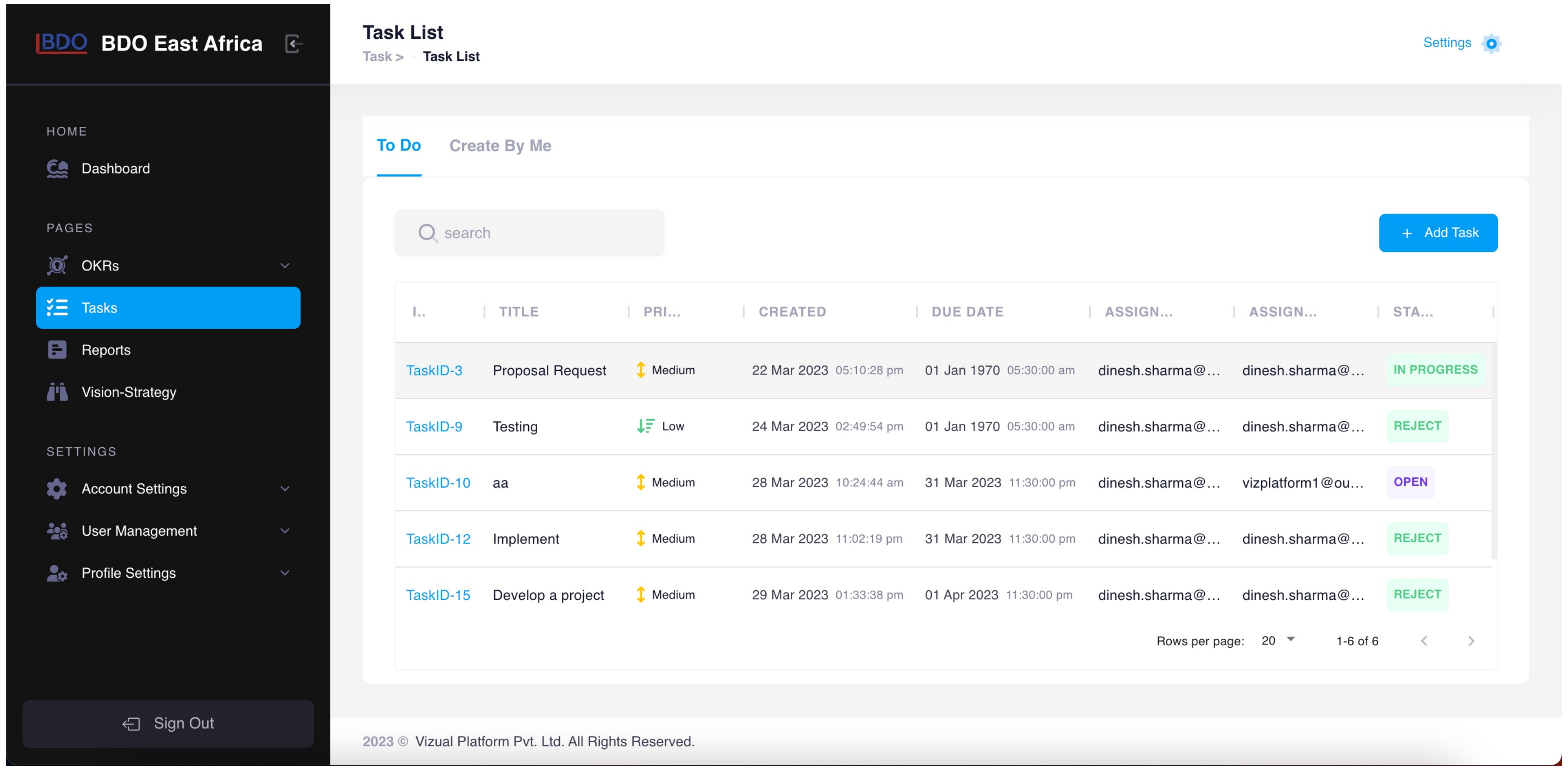


10 Task Details – To Do

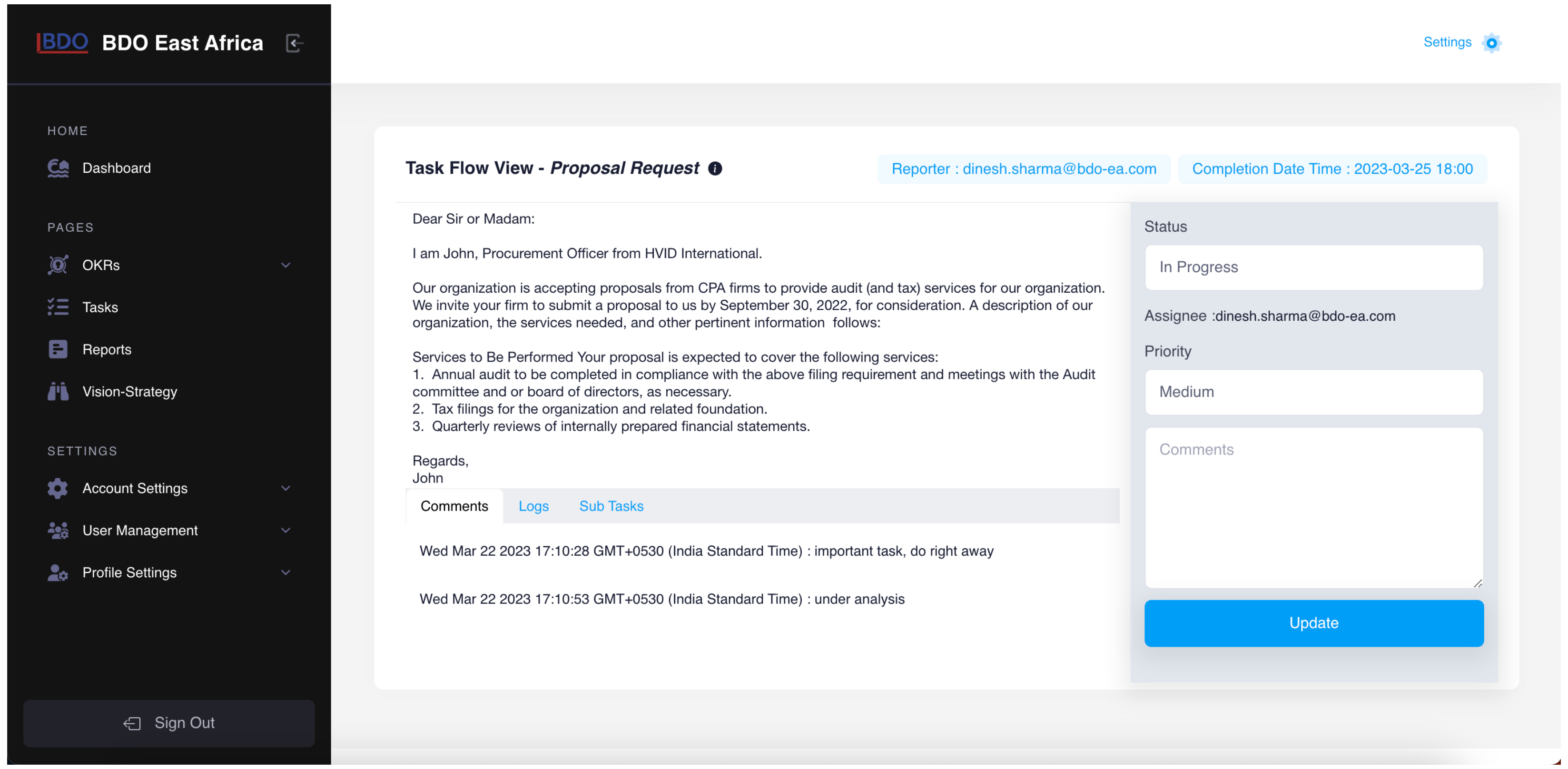
10.1 Login to the 'Vizual Pro' console

10.2 Click on Tasks

10.3 The user can click on **'To Do'** to see all tasks that are assigned to him (the person who logs into the console with his/ her credentials)**.** It shows all the task details Due date, status, priority etc.



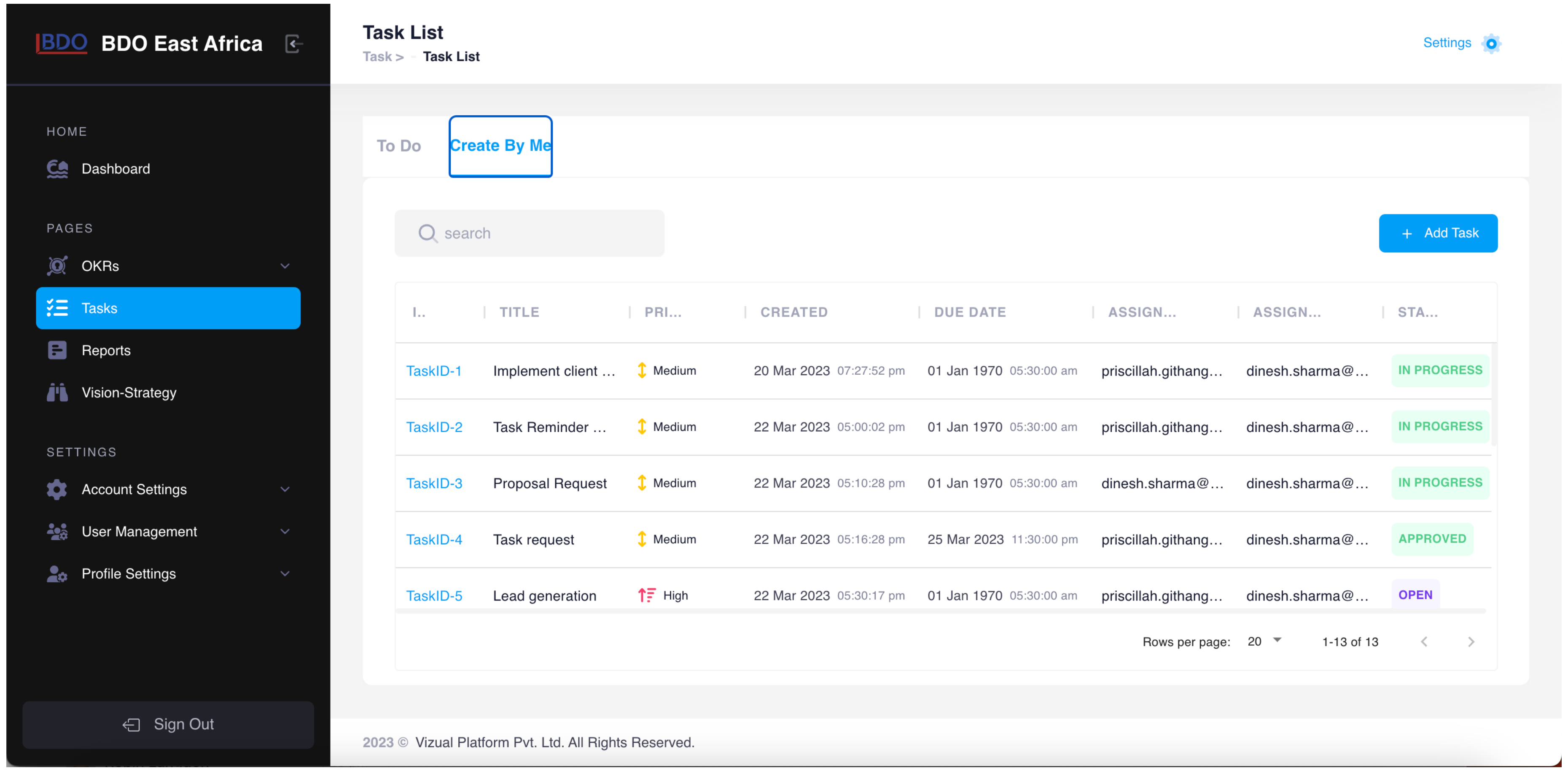
10.4 Click on 'Task Hyperlink' to view complete details



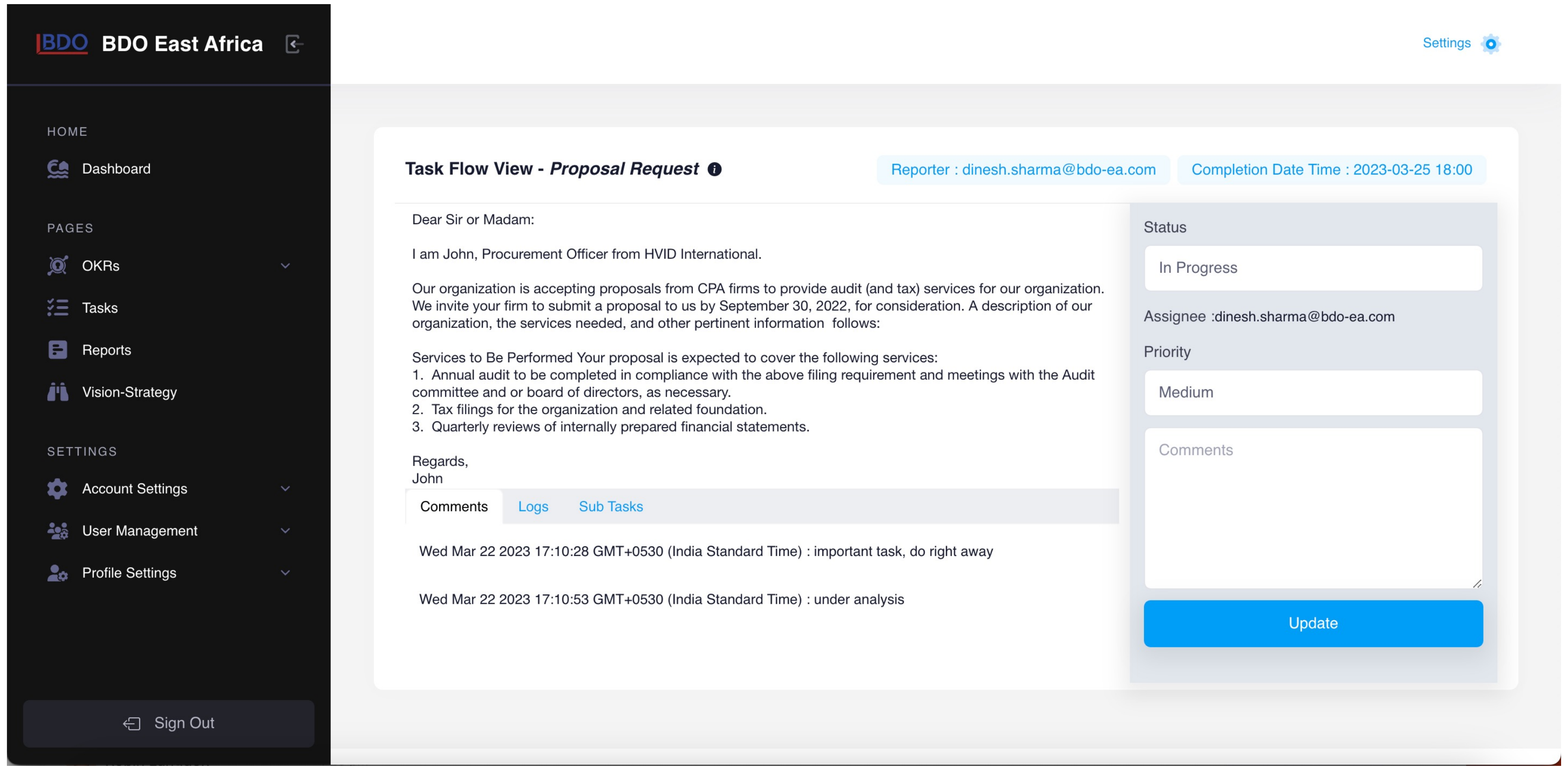
11 Task Details – Created by Me

11.1 Login to the 'Vizual Pro' console

11.2 The user can click on **'Created by Me'** to see all tasks that are created by Me/ Assignor of the Task (the person who logs into the console with his/ her credentials)**.** It shows all the task details Due date, status, priority etc.



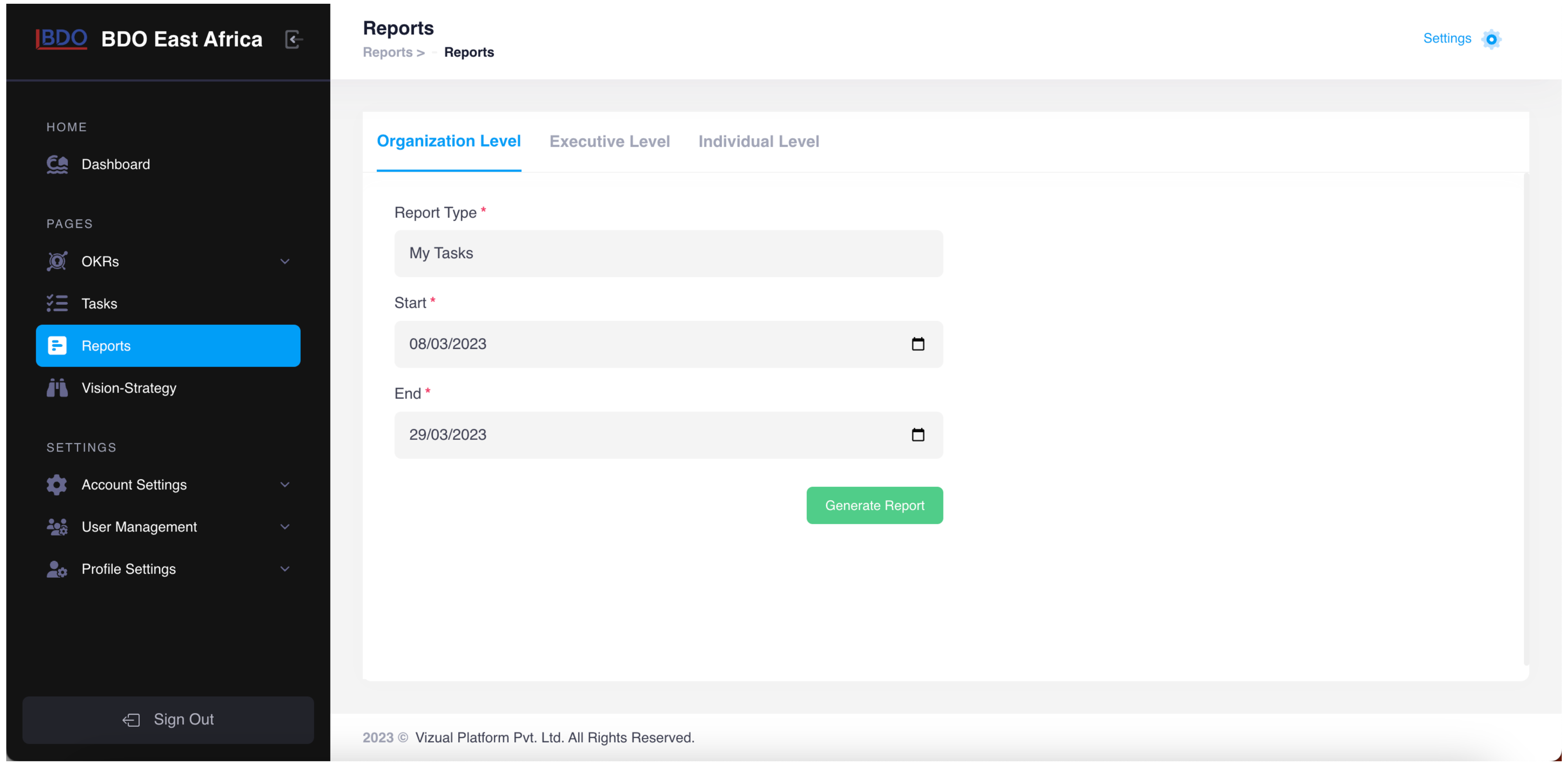
11.3 Click on 'Task Hyperlink' to view complete details



12 Reports – Organization Level

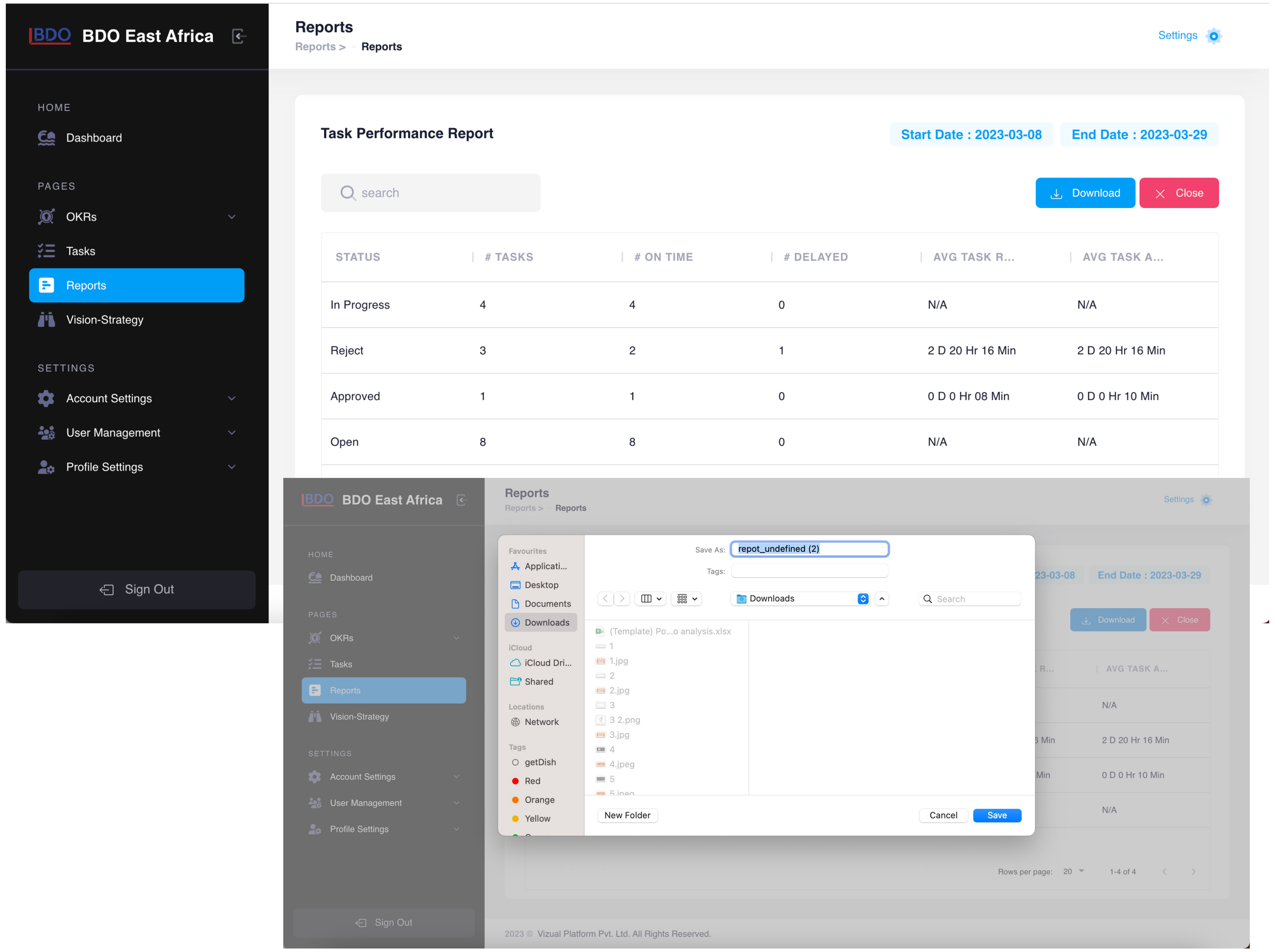
12.1 Login to the ’Vizual Pro’ console

12.2 The user can click on **’Reports’** followed by **‘Organization Level’** and **‘Task Performance Report’** to see how all tasks at the organization level are performing. The details like Task status, Avg. resolution Time, Avg. Task approval time etc. Click on **‘Generate’** to generate the report



12.3 The **report is ready** for view

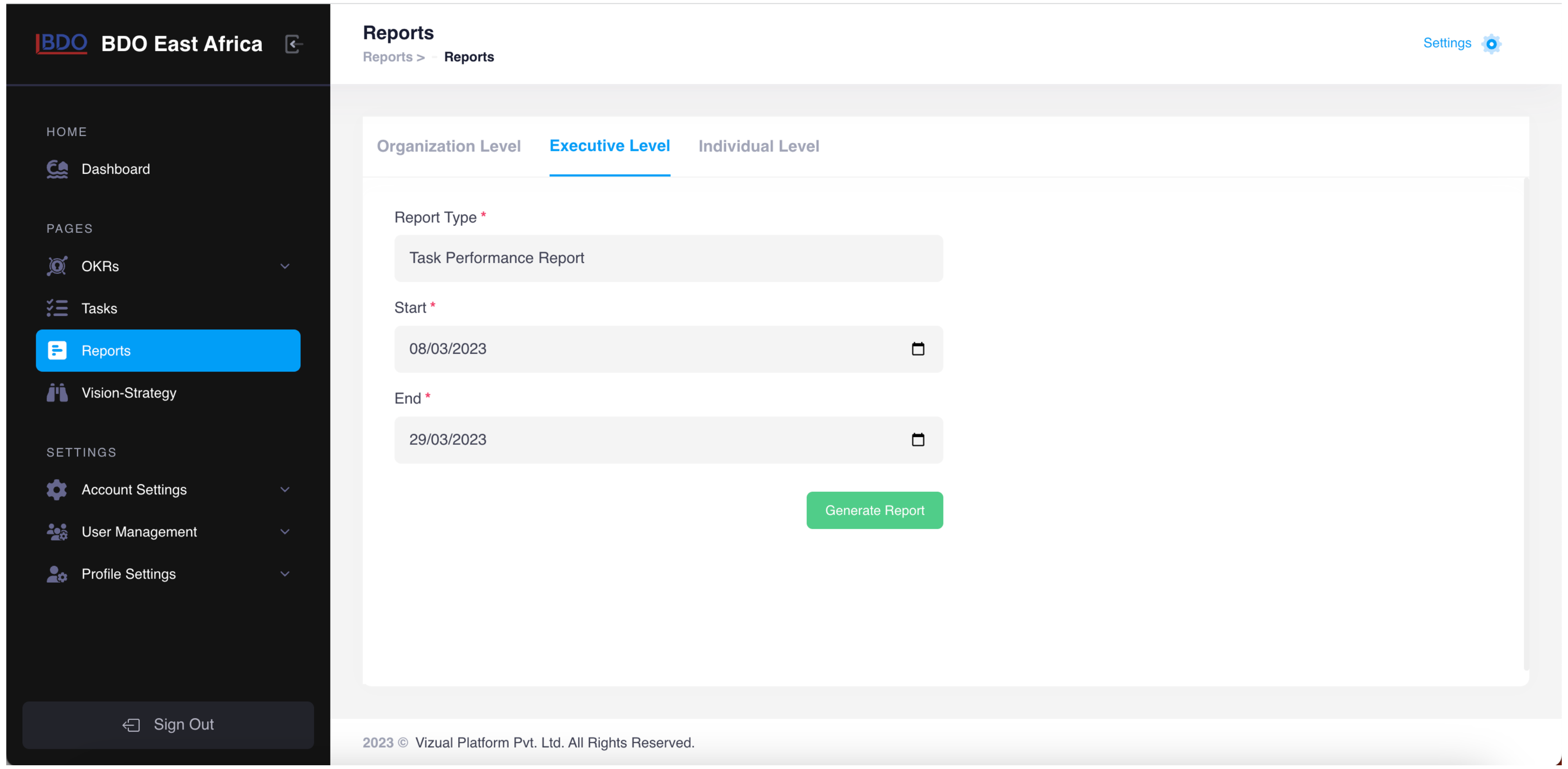
12.4 There is also an option to **download the report.** The report gets downloaded in CSV file format.



13 Reports – Executive Level

13.1 Login to the 'Vizual Pro' console

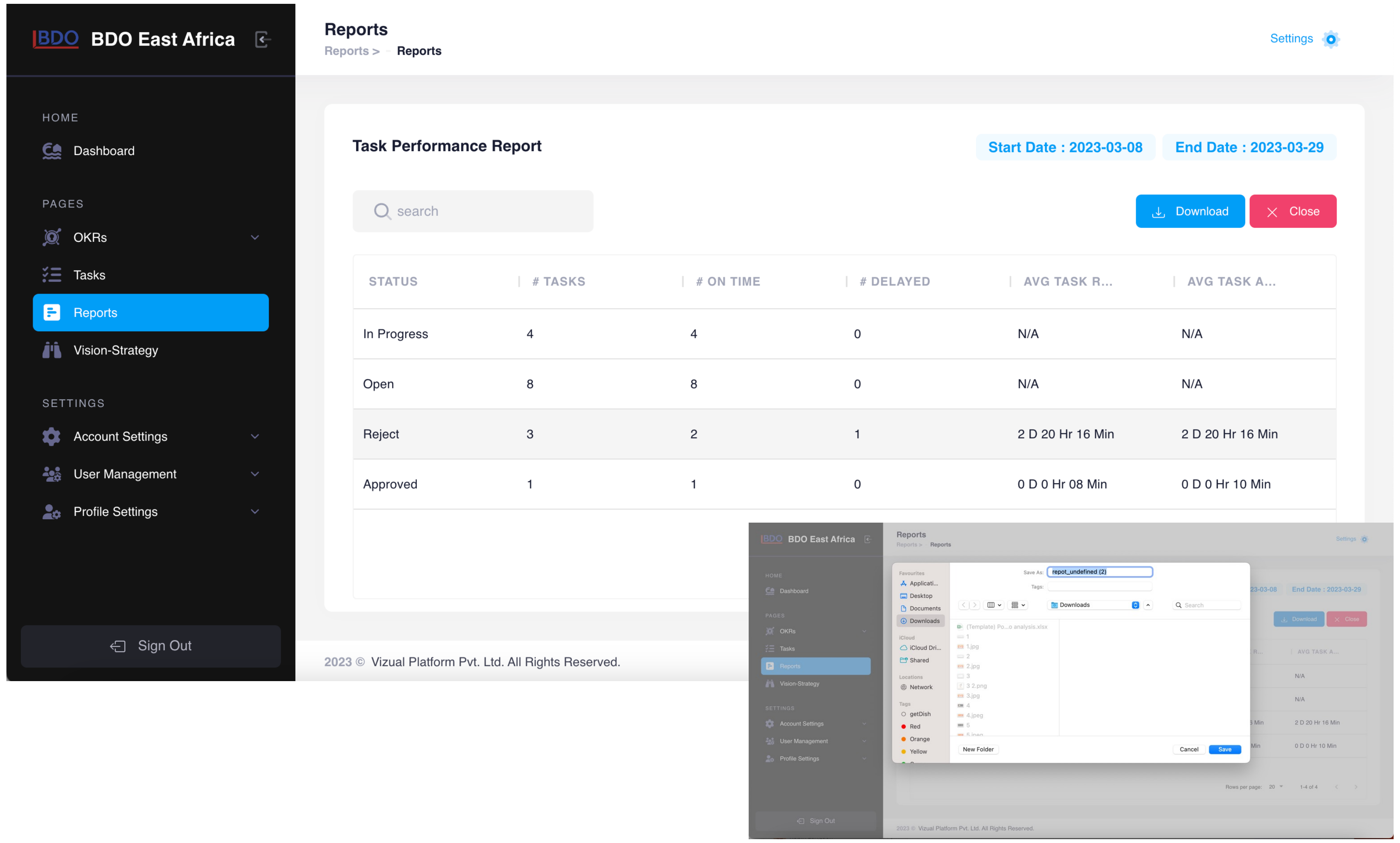
13.2 The user can click on **'Reports'** followed by **'Executive Level'** and **'Employee Performance Report'** to see how all tasks at an employee level or across all the employees are performing. The details like Task status, Avg. resolution Time, Avg. Task approval time etc. Click on **'Generate'** to generate the report.



13.3 The **report is ready** for view

13.4 There is also an option to **download the report.** The report gets downloaded in CSV file format.

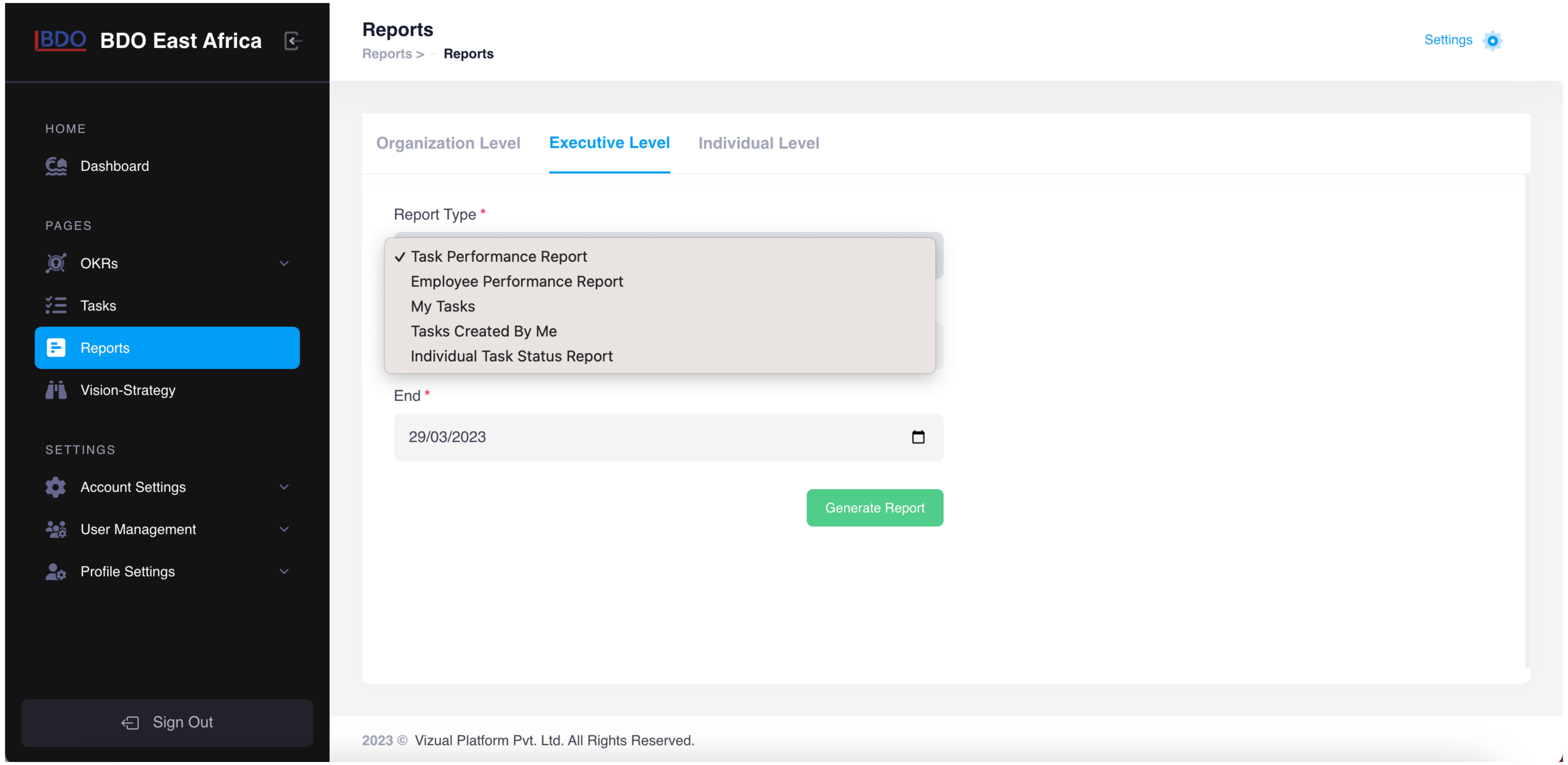
13.4 You can compare and contrast task performance against different employees



14 Reports – Executive Level

14.1 Login to the 'Vizual Pro' console

14.2 Similar to the previous reports, there are various reports are available, that can be generated and downloaded

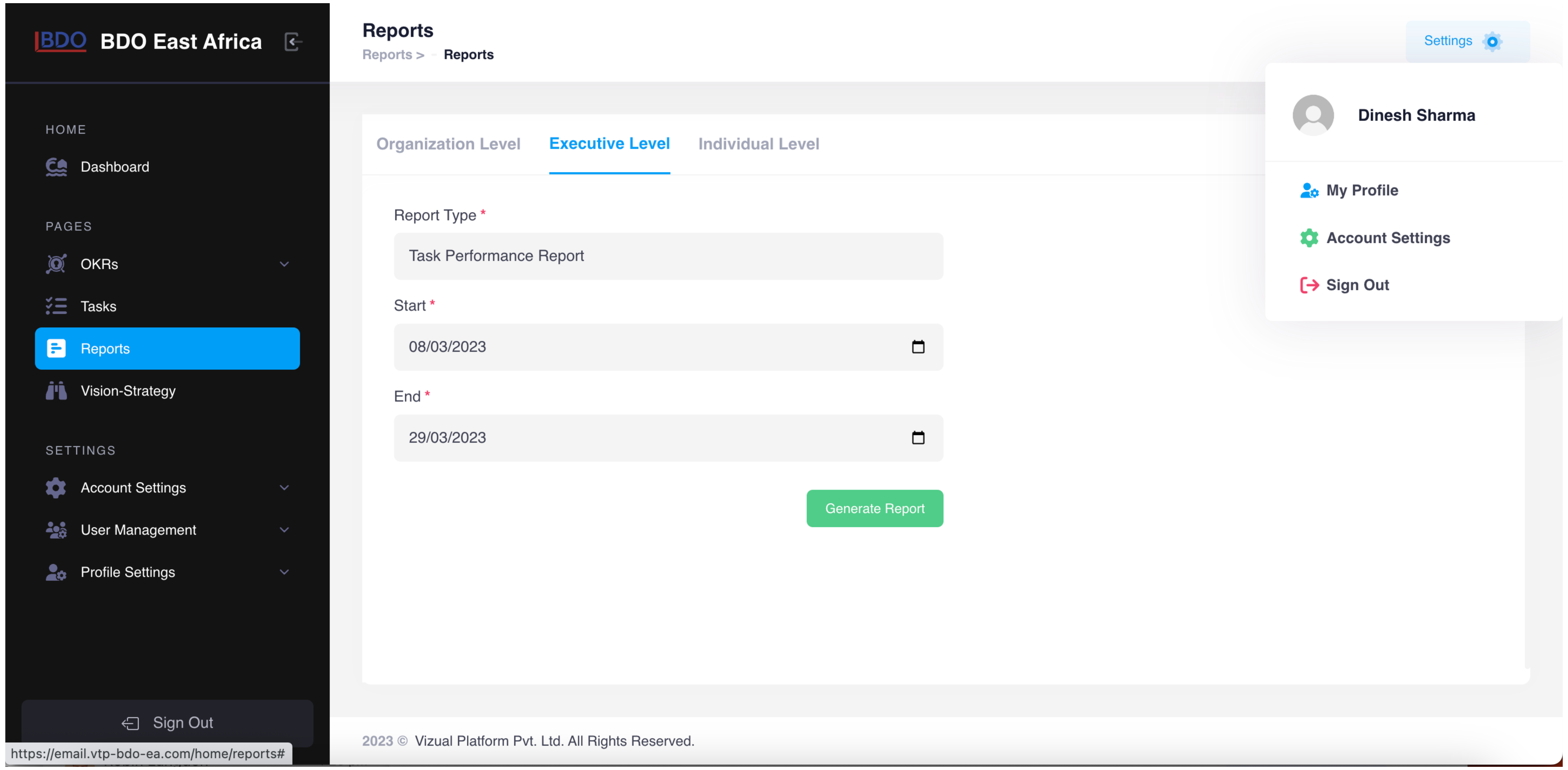


Handy tips and Instructions for Users

18 Logout

18.1 Click on **Settings Icon**

18.2 Click on **Logout,** You will be redirected to **Sign In screen**



Handy tips and Instructions for Users

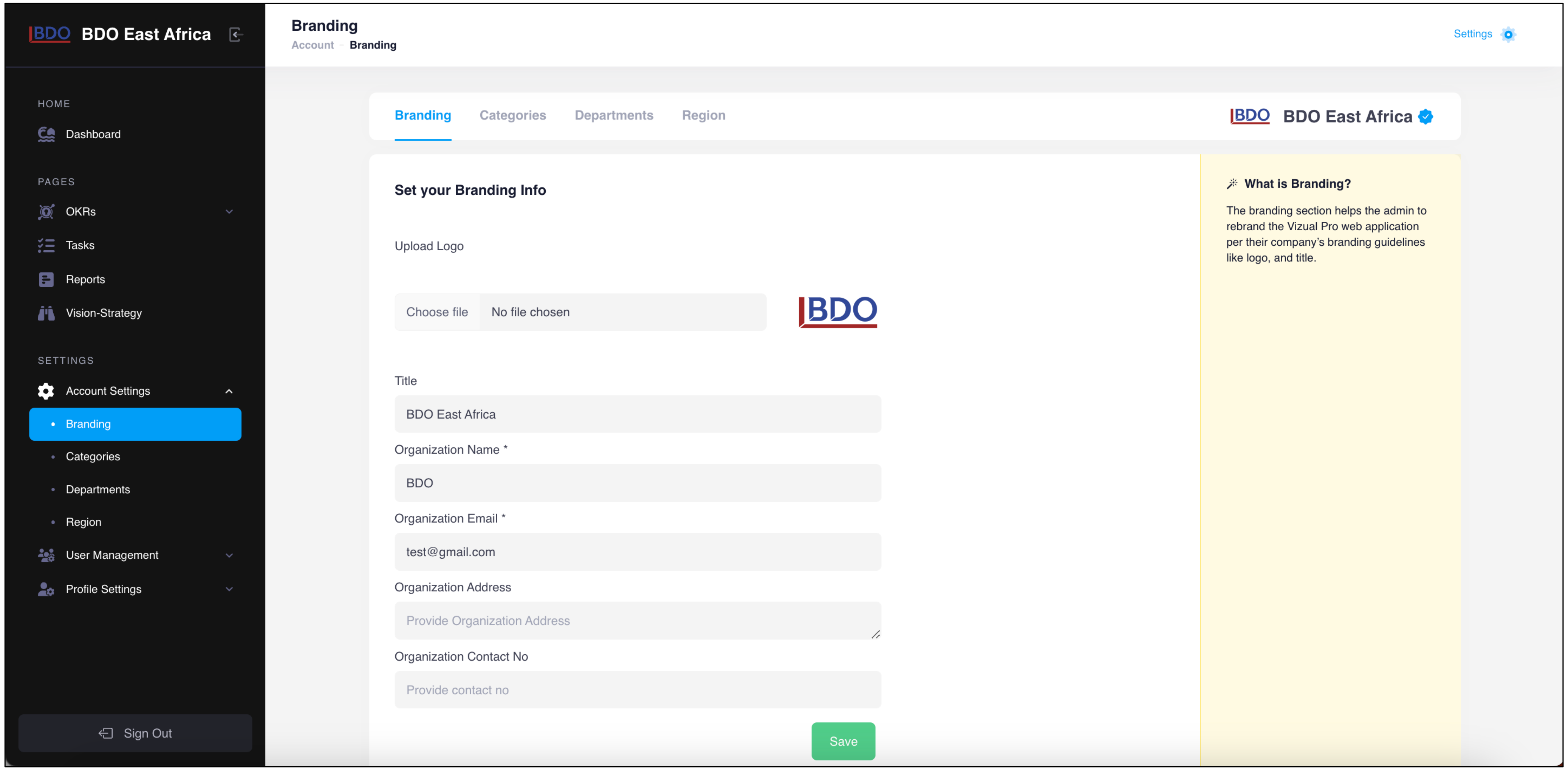
18 Account settings - Branding

18.1 Click on **Account Settings**

18.2 Click on **Branding,** Update the Branding information

18.3 Click on **Save**

18.3 Refresh the screen



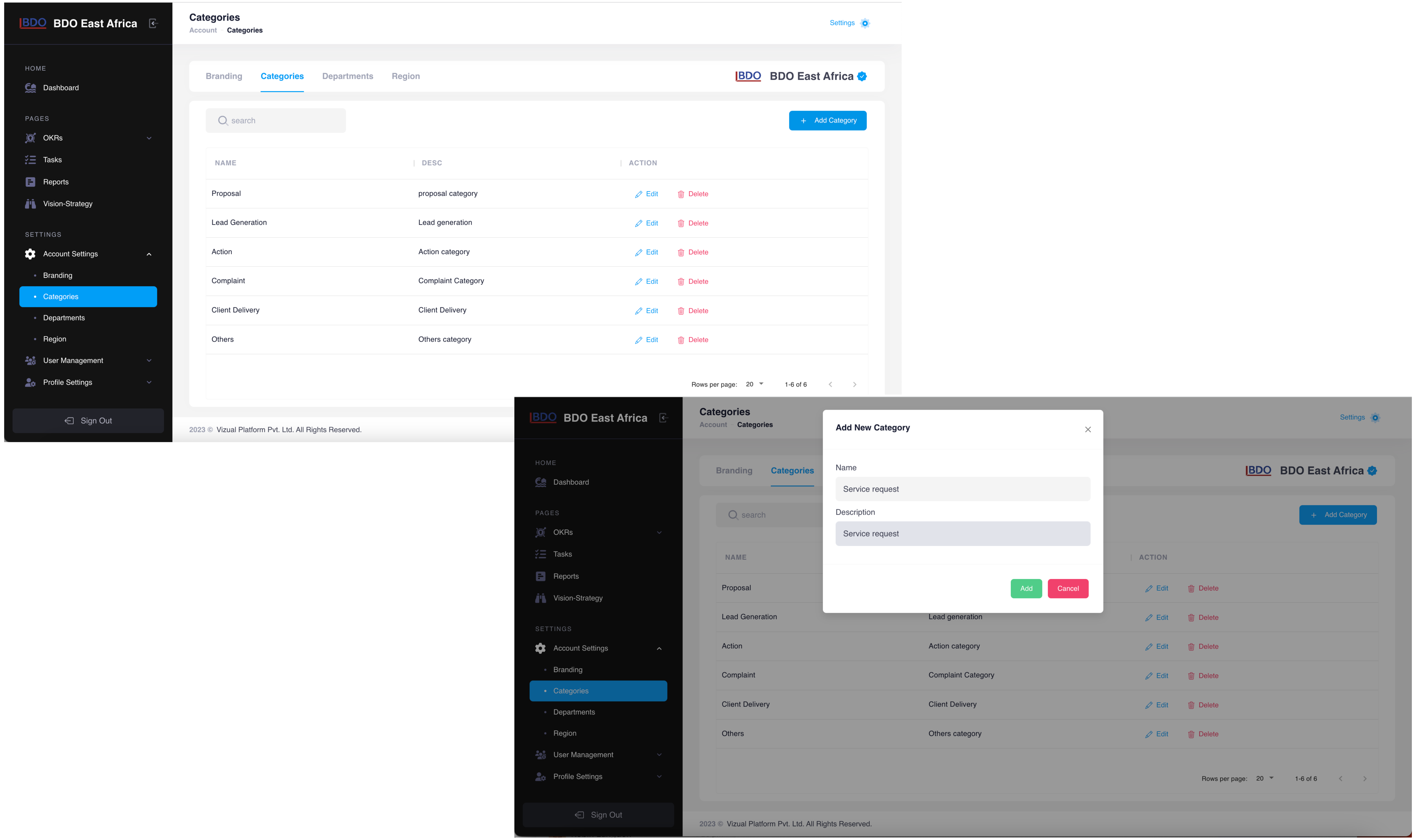
18 Account settings - Categories

18.1 Click on **Account Settings**

18.2 Click on **Categories,** Update the Category details

18.3 Click on **Save**

18.3 Next time when you create the Task, these categories will appear

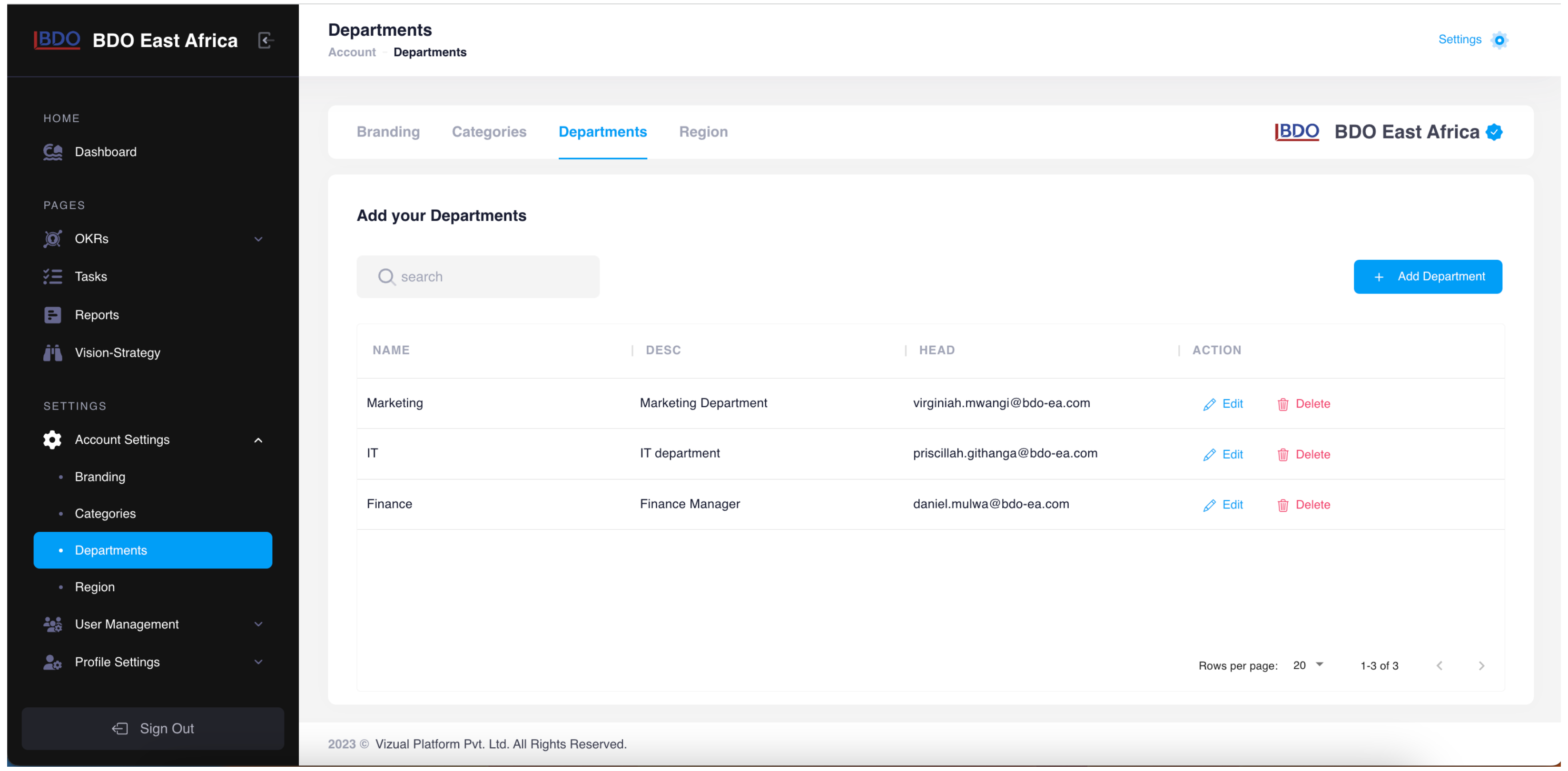


18 Account settings - Departments

18.1 Click on **Account Settings**

18.2 Click on **Departments,**

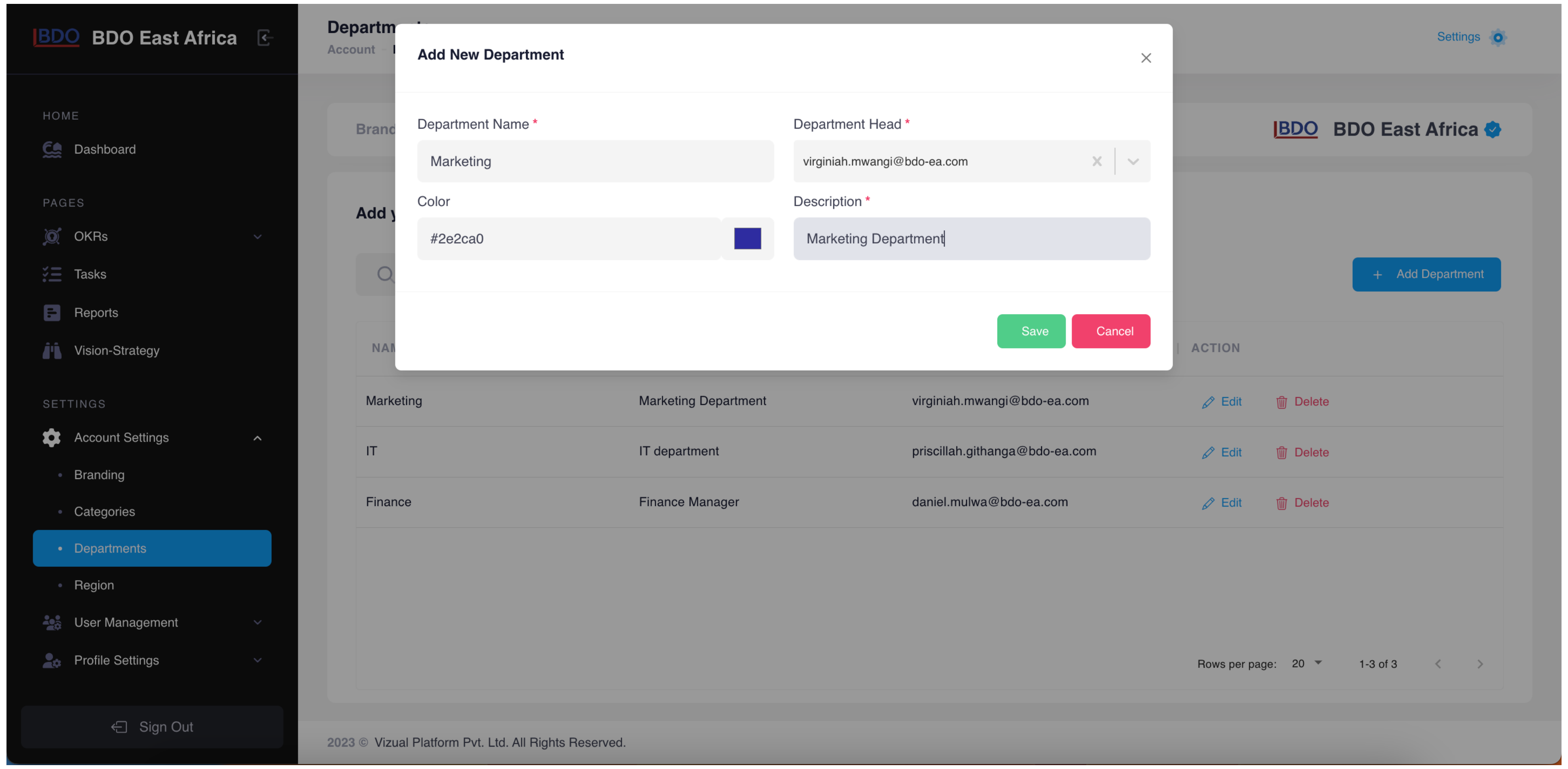
18.3 Click on **'+ Add Departments'**



18.4 Enter the **Department Details**

18.5 Click on **Save**

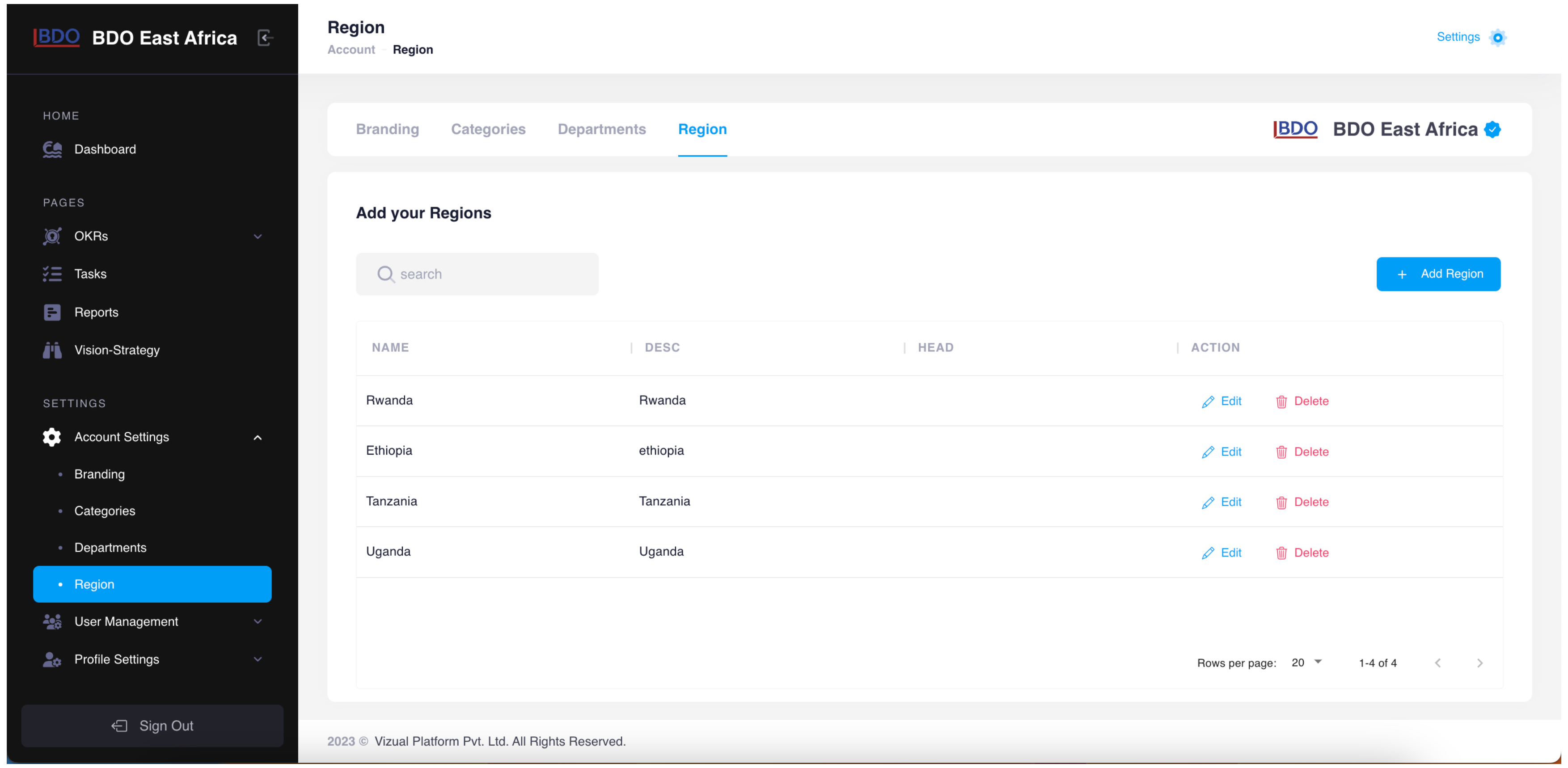
18.5 The department details help to assign OKRs, view Department level insights



18 Account settings - Regions

18.1 Click on **Account Settings**

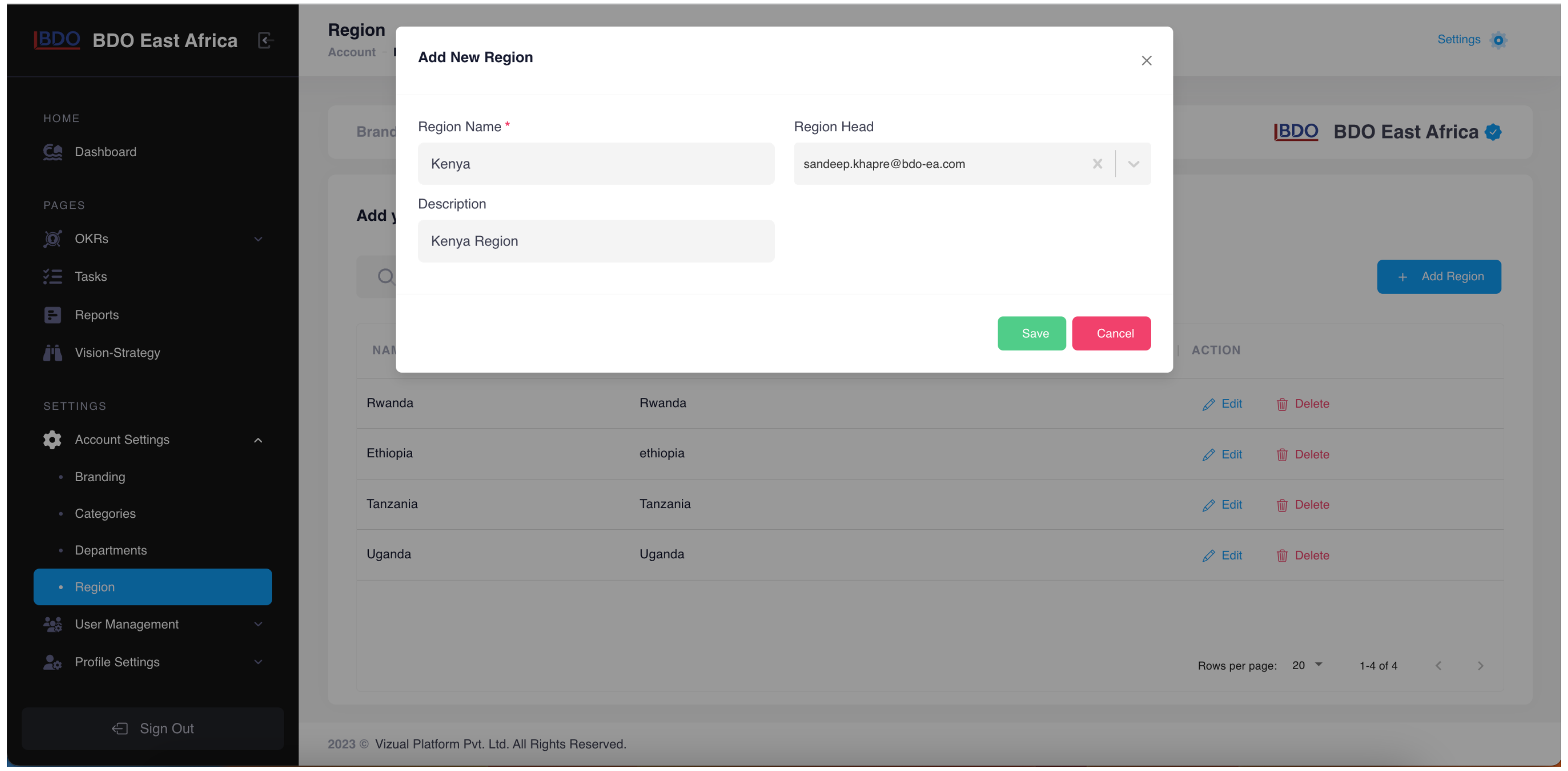
18.2 Click on **Regions – This helps to add multiple countries part of a Region**



18.4 Enter the **Department Details**

18.5 Click on **Save**

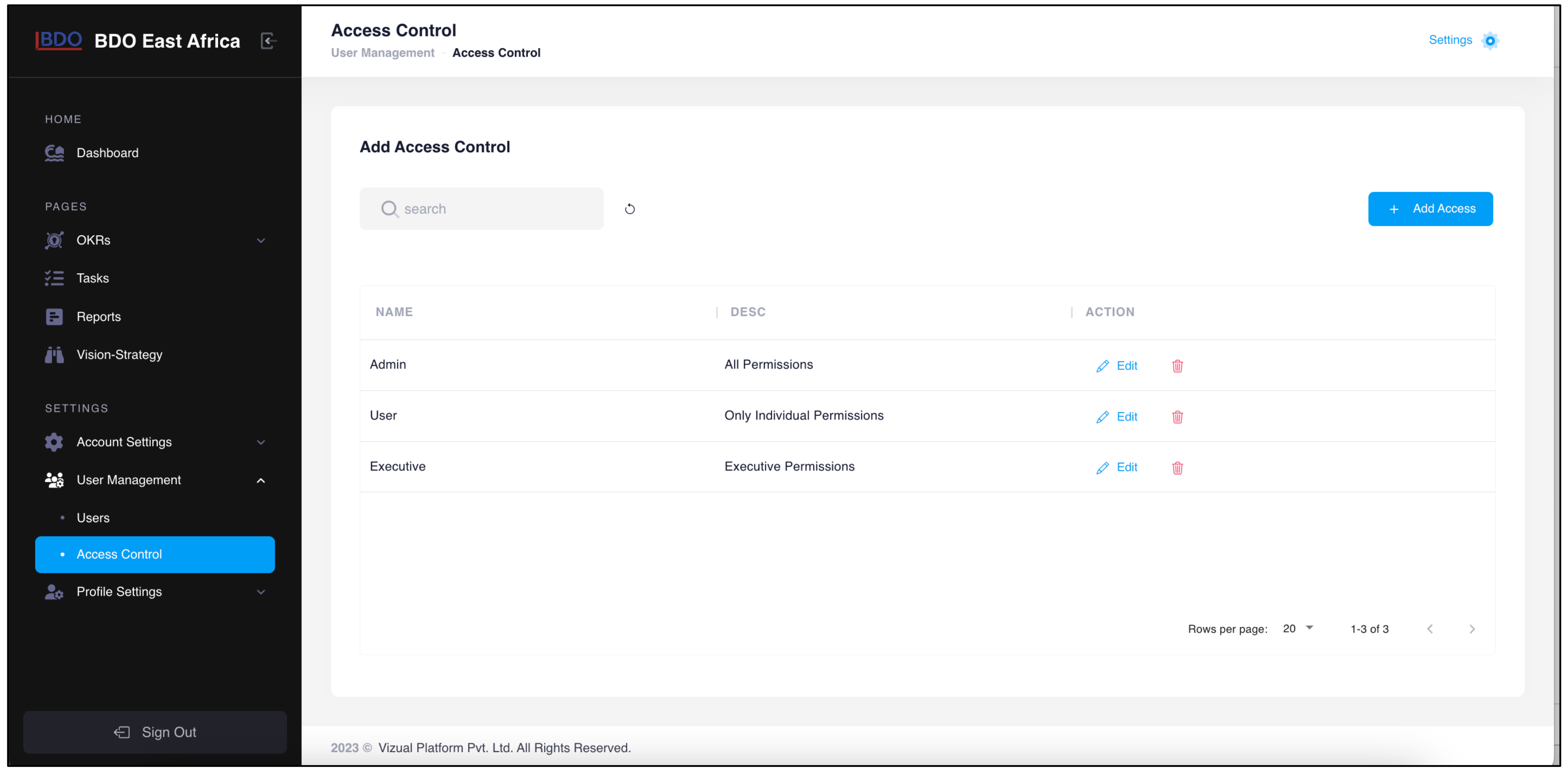
18.5 The department details help to assign OKRs, view Department level insights



18 User Management – Access Control

18.1 Click on **User Management**

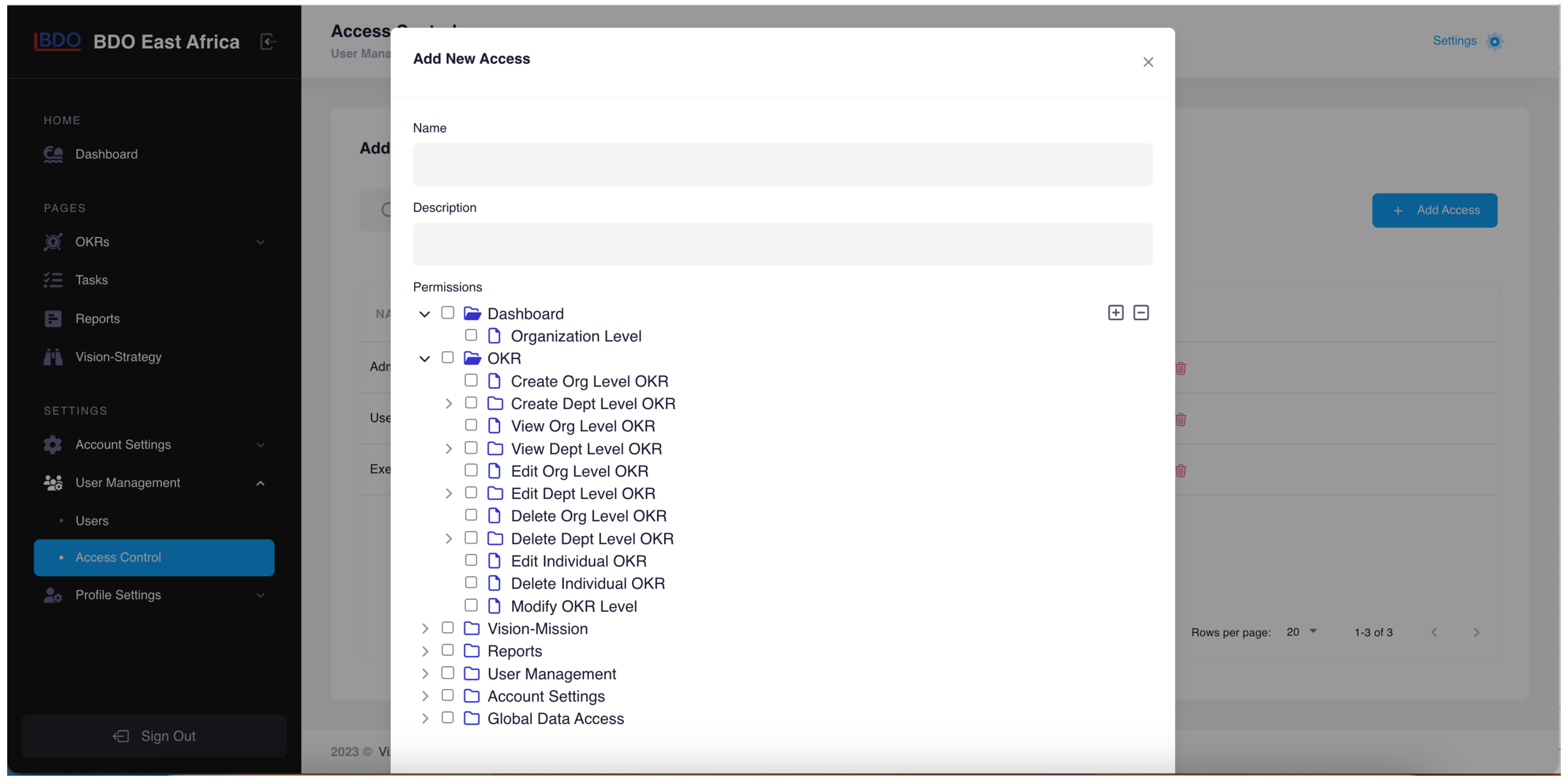
18.2 Click on **Access Control – This will show all the available roles.**



18.4 You can create a new role by clicking on **+Add Access**

18.5 The Add access will show all the features to which access can be given

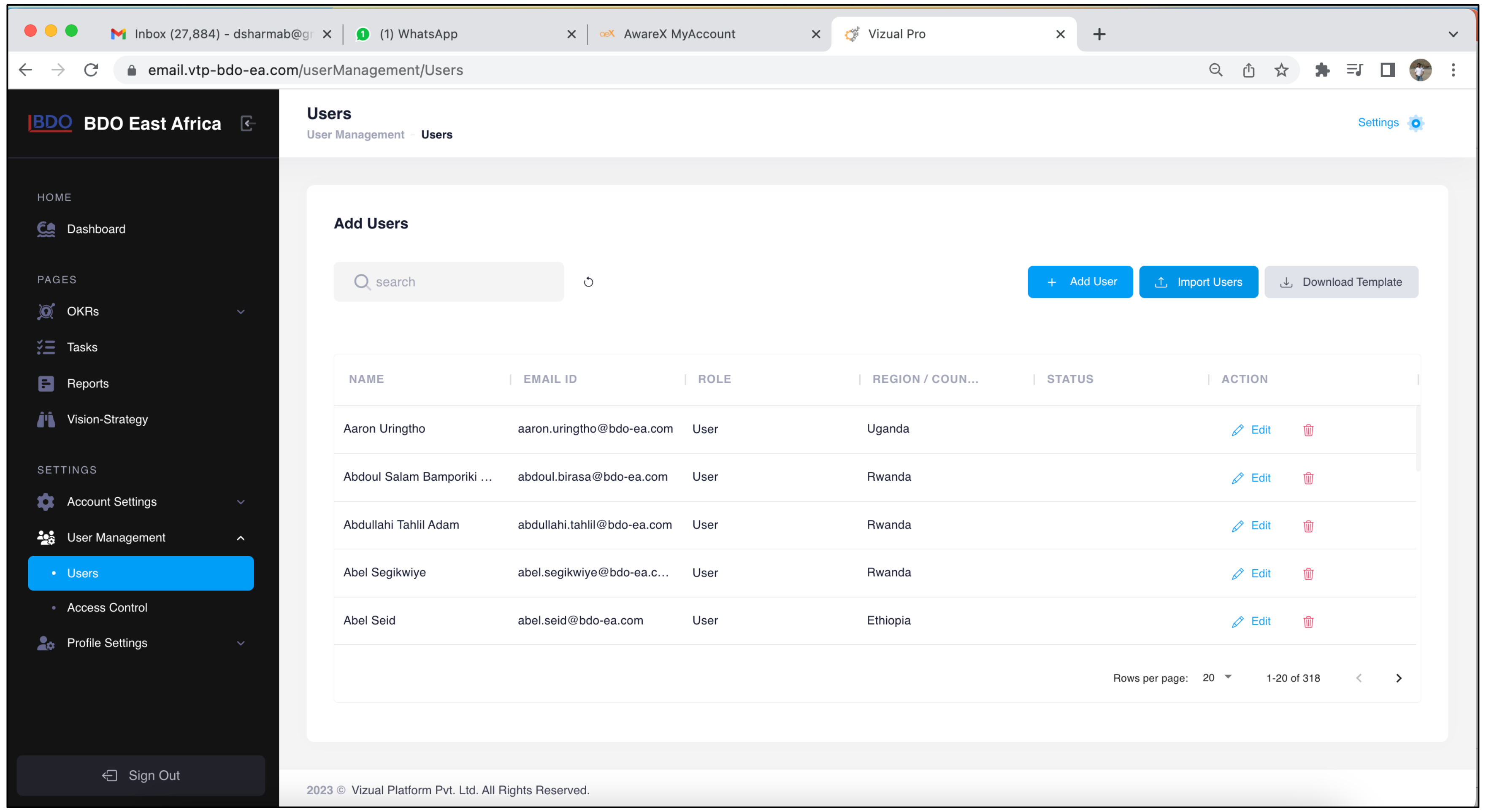
18.5 Define the role, select the access and click on **'Add'**



18 User Management – Users – View, Add individual, Bulk add using Import

18.1 Click on **User Management**

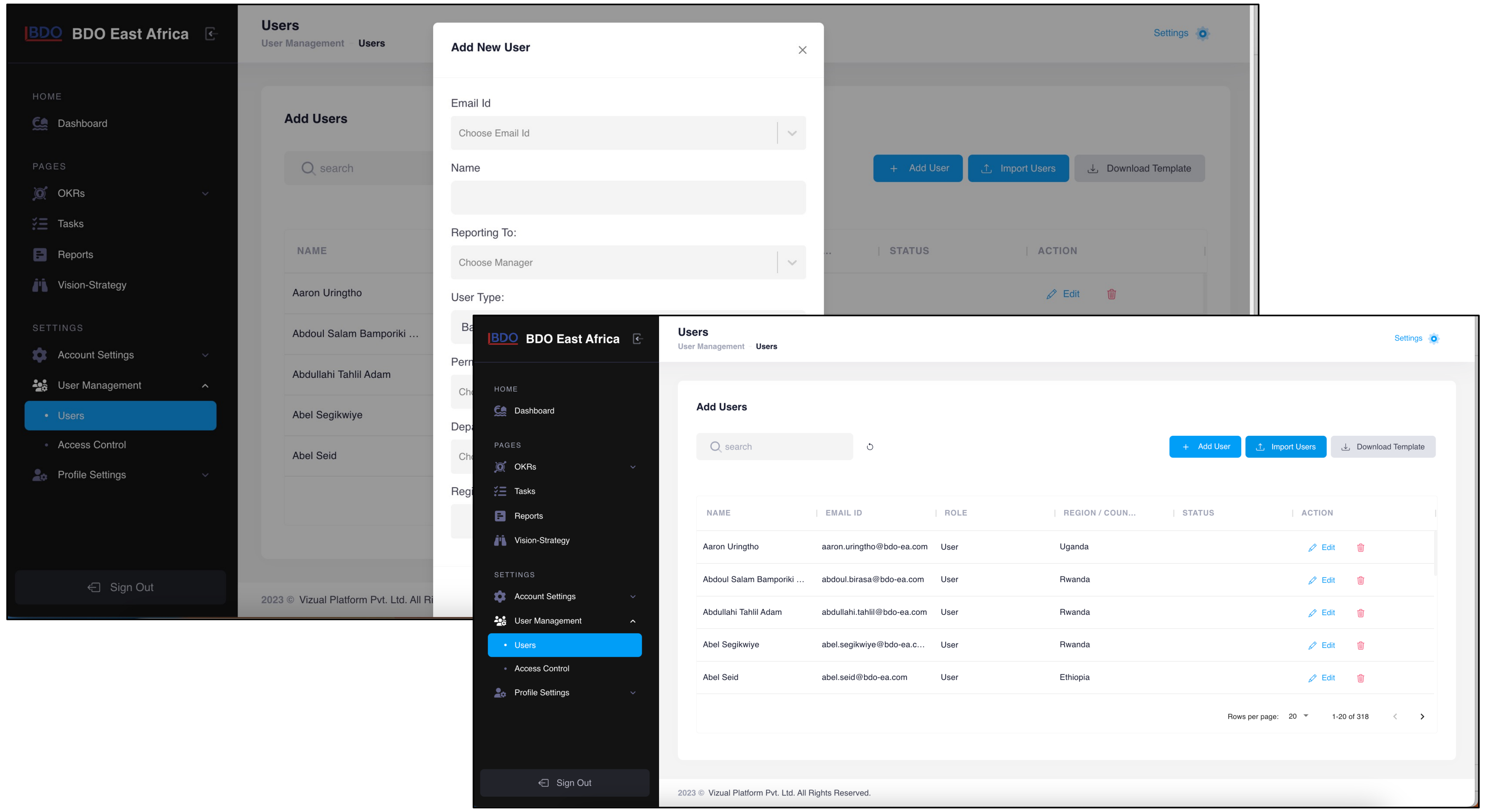
18.2 Click on **Users –** This shows the existing users



18.4 Add users using **'+ Add users'**

18.5 You can add users individually, by entering the details, specifically add the **User Type** based on the access created in the previous step and clicking on **'Save'**

18.5 You can export the template and add the users in the CSV format and import the users throubh bulk import option

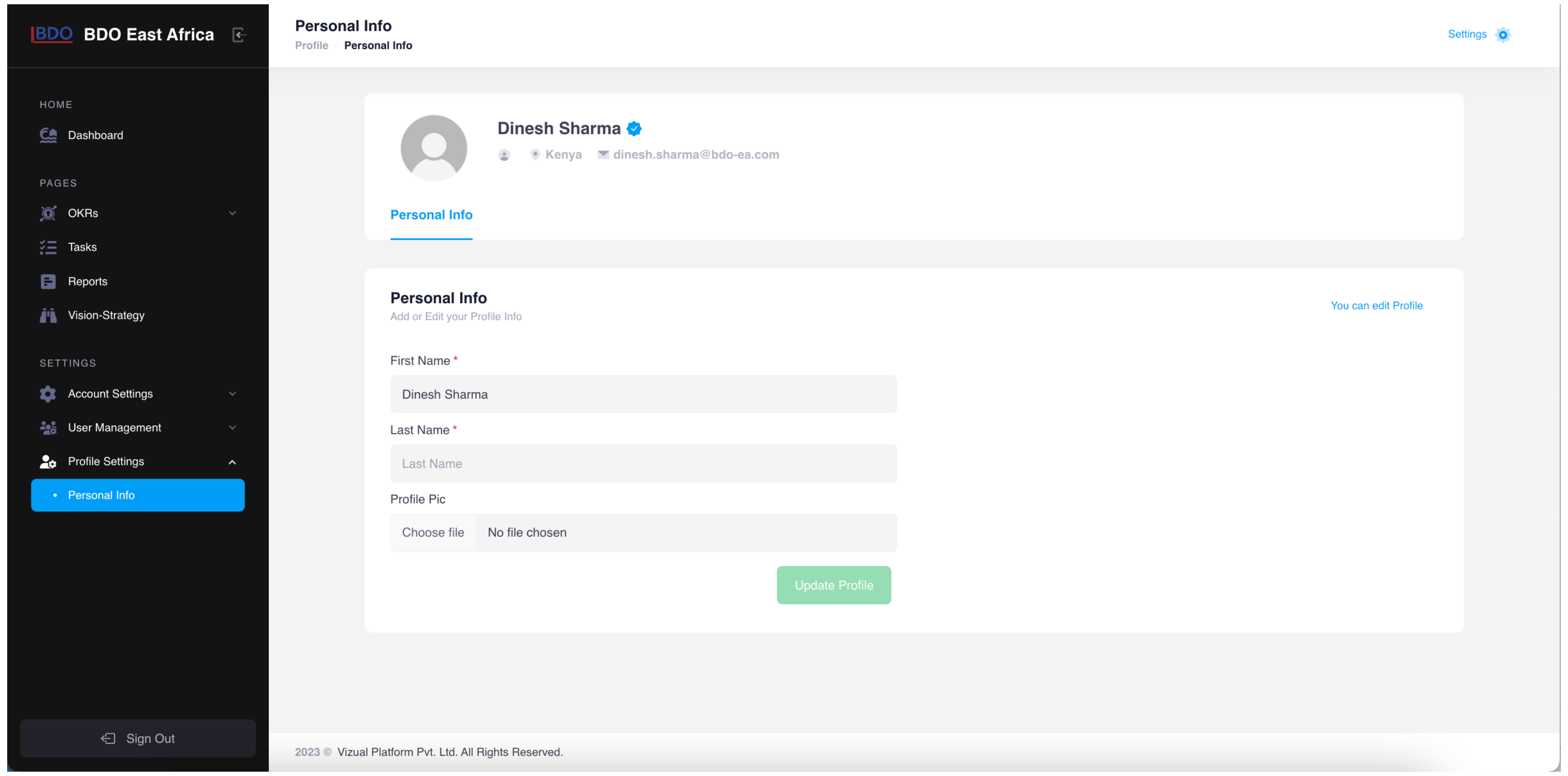


18 Profile Settings – Personal Info

18.1 Click on **Profile Settings**

18.2 Click on **Personal Info**

18.2 Update the Personal Info and click on **’Update Profile’**



VIZUAL PLATFORM

Your Feedback matters.

Thank You!