Reflexis Task Manager User Guide

OVERVIEW

Reflexis Task Manager is Total Wine & More's task management system designed to simplify work, enhance communication, and empower productivity across our organization. This guide contains the technical use of Reflexis Task Manager functions to help Field-level users get started using the Reflexis platform.

For additional information on Reflexis Task Manager, see the training curriculum on Talent Gateway.

Contents

1. ACCESSING REFLEXIS 2
2. FIRST TIME LOGGING IN 2
   BROADCAST MESSAGING 2
3. MAIN NAVIGATION 4
   SYSTEM LINKS 4
   CUSTOM LINKS 4
   FILTER FUNCTIONS 5
   VIEW OPTIONS 5
4. INCOMING 6
   PROJECT DETAILS 7
   OPENING A MESSAGE FROM THE PROJECT 9
5. CALENDAR 10
6. MESSAGING 11
7. FORMS 12
8. STORE WALK 15
9. OVERDUE 18
10. TROUBLESHOOTING 18
    WEB BROWSER NAVIGATION BUTTONS 18
    SESSION TIME OUT 18

Reflexis Task Manager User Guide

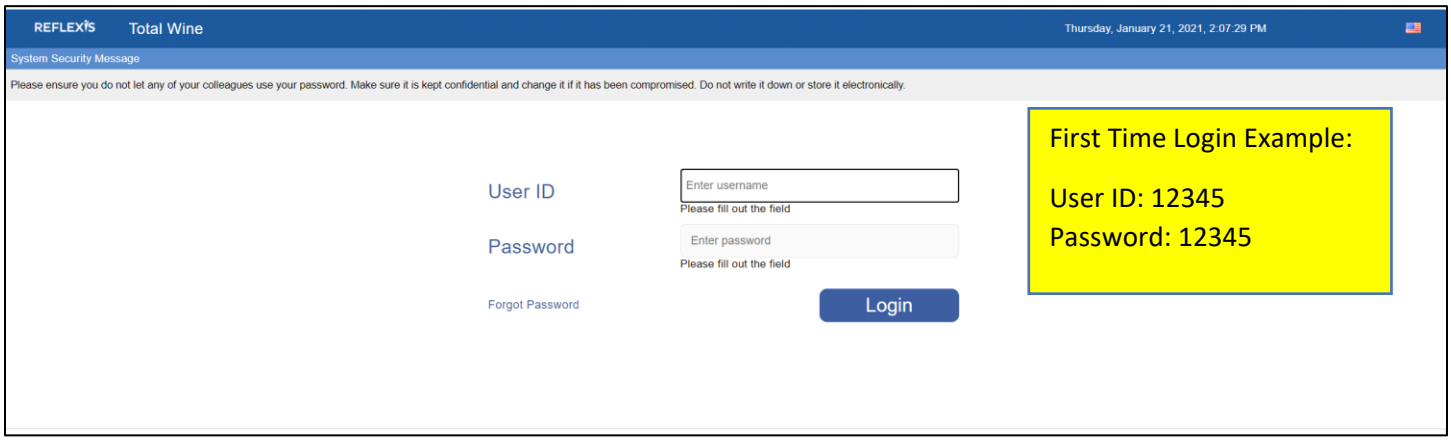
1. ACCESSING REFLEXIS

Team Members can access Reflexis from the link on the Corkboard or through the app on a SAM device.

- System access and functionality are based on your assigned Total Wine & More role.
- Google Chrome is the preferred web browser for Reflexis.

2. FIRST TIME LOGGING IN

To log in for the first time, employees should sign in with their five-digit employee ID number as the username and password.



Important Note: Most employees have a five-digit employee ID number. However, if your employee ID is fewer than 5-digits, add the appropriate number of zeros to the front of your employee ID number to reach 5 digits (e.g., 01234).

Logging in for the first time will prompt employees to set up security questions and a new password.

- Select the preferred Security Questions from the options in the dropdown, and type in the response in the designated fields
- Create a new password
    - Follow the password specifications directed in Reflexis
- Click **Save**

Once the account is set up, users will be prompted to log in using their new password.

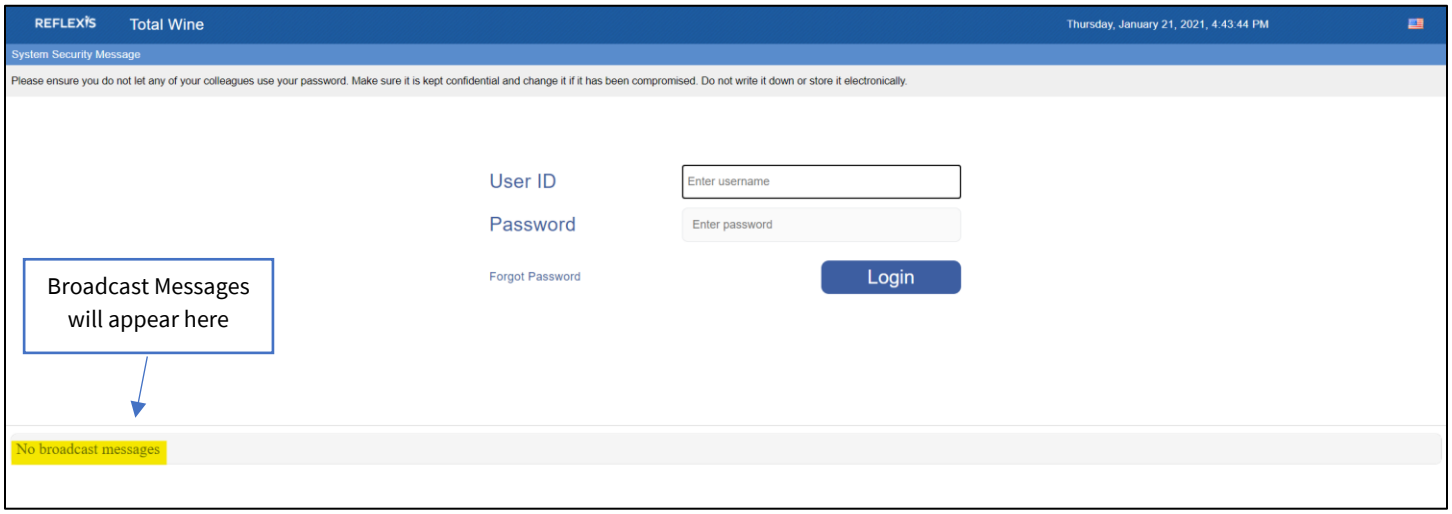
Passwords and security questions will need to be reset every 90 days.

BROADCAST MESSAGING

A broadcast message is an announcement created with Reflexis Task Manager visible on Reflexis My Work on desktop and mobile. Broadcast messages can be customized with an effective date, formatting options, pictures, and links.

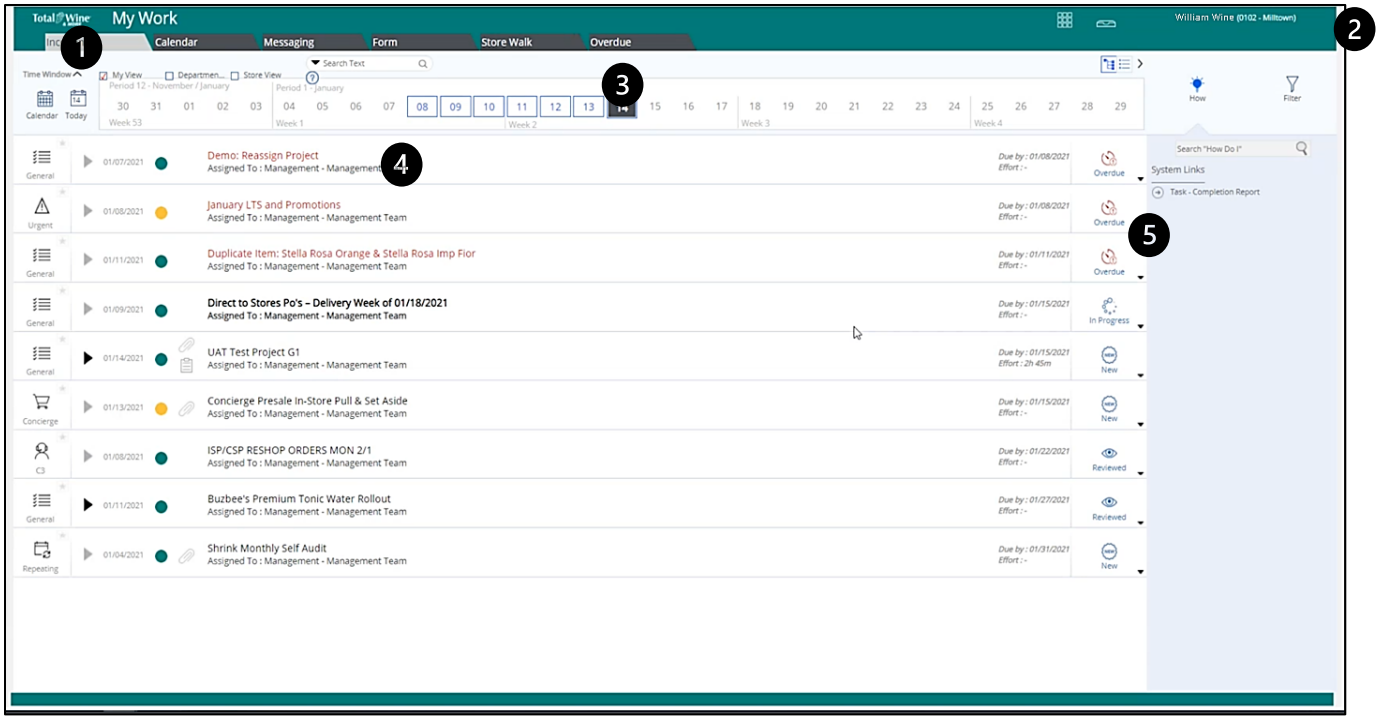
A broadcast message can be Public or Private, allowing the SSC to send it to all users or to target a specific sub-set of users. See the table below to see the display details for Public and Private messages.

Public	Private
• Desktop: On log on screen below log on credentials • Mobile: On log on screen, click Broadcast Message to view information	• Desktop: As a scrolling banner at the bottom of the screen seen after logging in. Click on it to open and read more • Mobile: As a popup notification upon logging in. Click on the grid menu and select Broadcast Message to read more



3. MAIN NAVIGATION

Reflexis My Work is your platform view. Refer to the table below for the My Work components and descriptors.



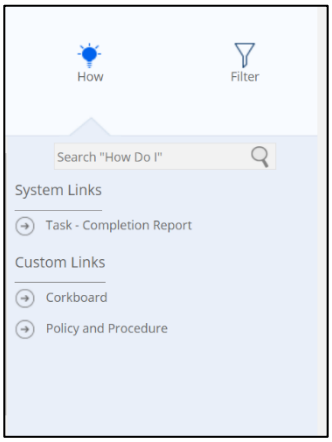
No.	Component	Description
1	Tab Menu Bar	Provides access to main My Work functions (i.e., Incoming, Calendar, Messaging, Form, Store Walk, Overdue)
2	Name Quick Link	Provides access to Reflexis user account details and Sign Out button
3	Calendar Pane	Ability to change the period for the information displayed (day, week, month, etc.). This also reflects our Total Wine fiscal weeks
4	Projects Pane	Displays projects, forms, and store walks for the calendar period selected
5	Right Pane	Provides access to additional functions like System Links, Custom Links and the Filter. The filter provides numerous filter options available on different tabs in the Reflexis platform

SYSTEM LINKS

System Links will populate based on the system access and functionality of your assigned Total Wine & More Role. When available, System Links offer quick access to reporting, project creation, task field view and more.

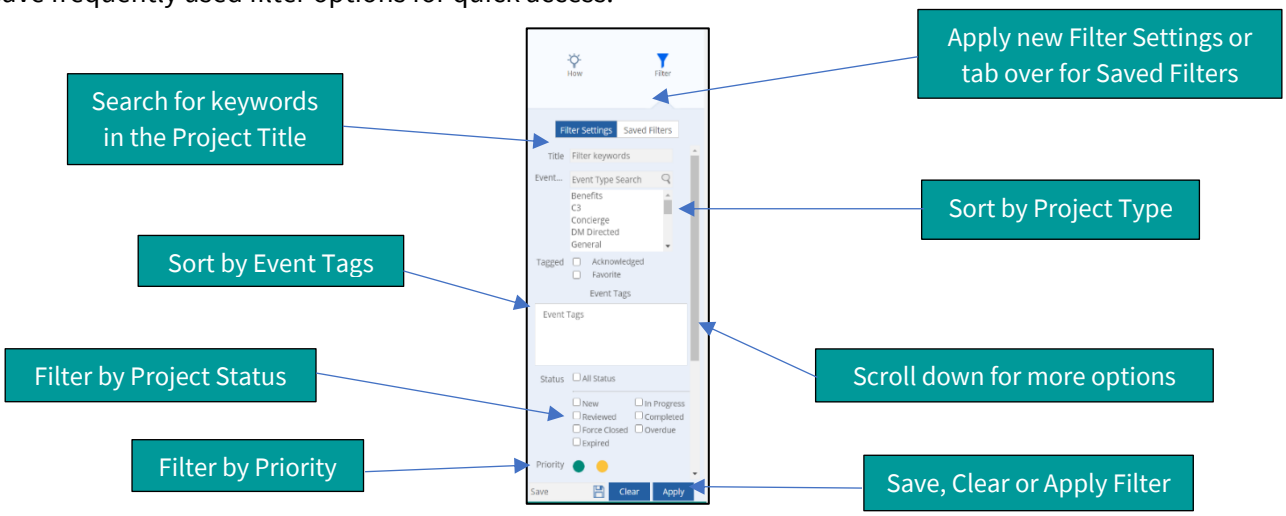
CUSTOM LINKS

Custom Links will serve a quick reference jump to external sources like the Corkboard and the Policy & Procedures page. All TWM roles will have these Custom Links along the right pane of the main navigation screen.



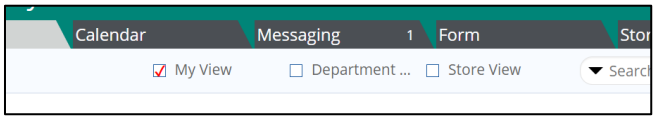
FILTER FUNCTIONS

The Filter allows users to control the information displayed on the active My Work window. Filter options available on the Right Pane are based on the function in use and My Work window displayed. The Save Filter function enables you to save frequently used filter options for quick access.



VIEW OPTIONS

There are different view options available within Reflexis My Work. Access to these different views is based on your Total Wine & More role.



My View: The default and the option available to all users. This view shows all things assigned to the individual user.

Department view: The view of items assigned to a specific department (merchandising, front end, etc.)

Store view: The overall view of all items assigned to any team members/departments in the store. Only Store Managers and Assistant Managers have access to this view.

To change the view in Reflexis web:

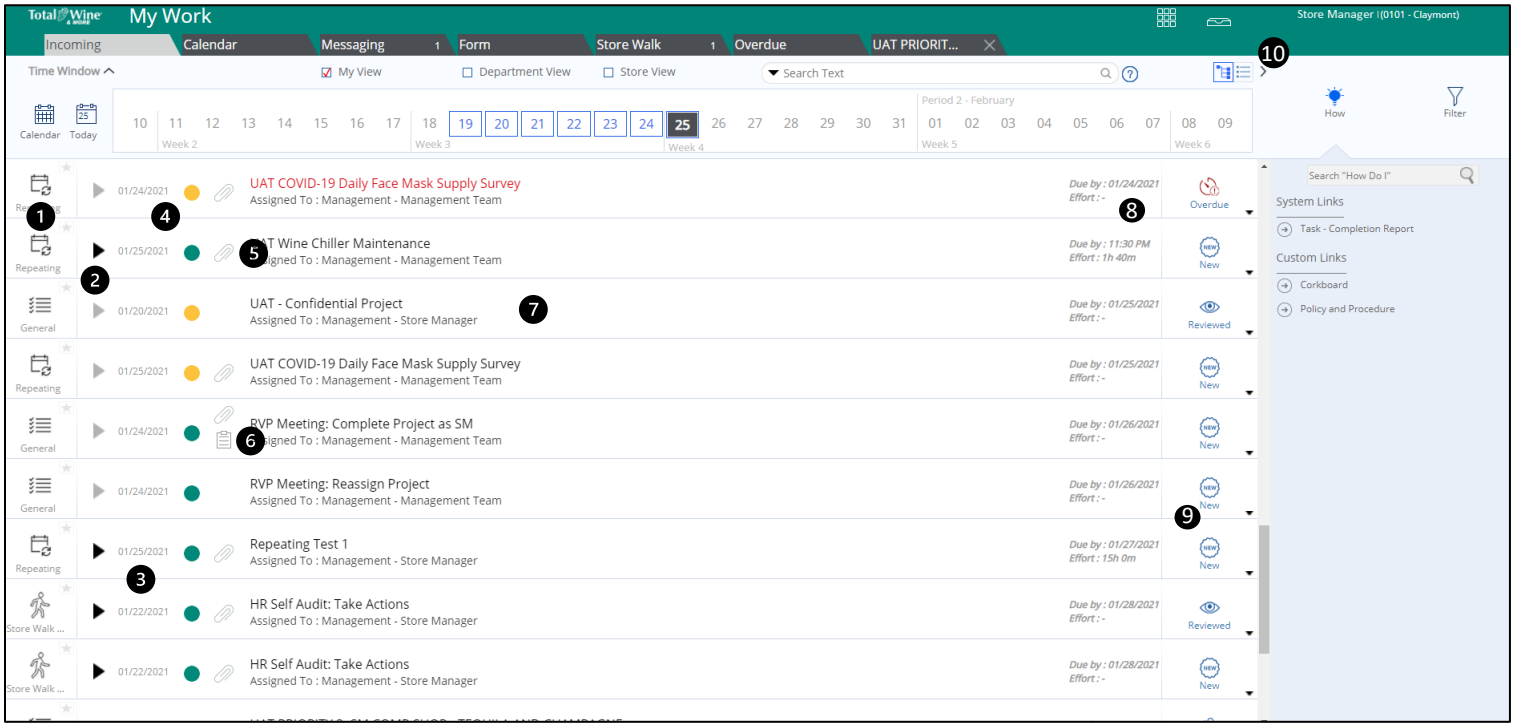
- Underneath the Tab Menu Bar locate the view options available to your user
- Select the preferred view
- If selecting Department View, choose the department from the dropdown list (e.g., Front End, Merchandising, Management)
- Screen will refresh showing the selected view

To change the view in the Reflexis app:

- Click the Grid icon in the top left corner
- Select View Type
- Choose the available option from the drop-down list
- Screen will refresh showing the selected view

4. INCOMING

The Incoming tab provides notifications regarding active projects, tasks, and store walks assigned to each user, and is where team members will view and complete projects. Refer to the table below for the Incoming tab components and descriptors.

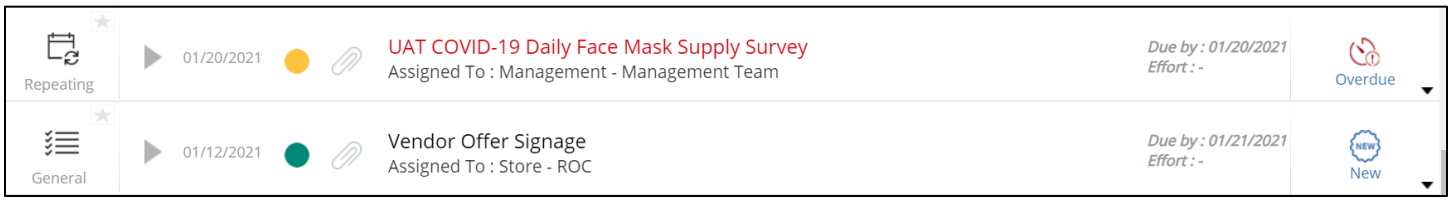


No.	Icon	Description
1		Project types. There are icons for each project type. See the *Reflexis Task Manager Project Types* for additional details on the project types and descriptions.
2		Individual project Project with sub-tasks, will open in another tap for easier viewing
3	n/a	Assigned date
4		Standard priority High priority
5		Project that has an attachment
6		Project that includes feedback request, typically survey-like questions
7	n/a	Project title
8	n/a	Project due date
9		Project status. There are icons for each status. (e.g., New, Reviewed, In Progress, and Overdue)
10		Allows users to toggle between Project View vs. Task View. For Store Managers, using “My View” and “Task View” is the only way to see subtasks that are specifically assigned to them (without having to open every project).

PROJECT DETAILS

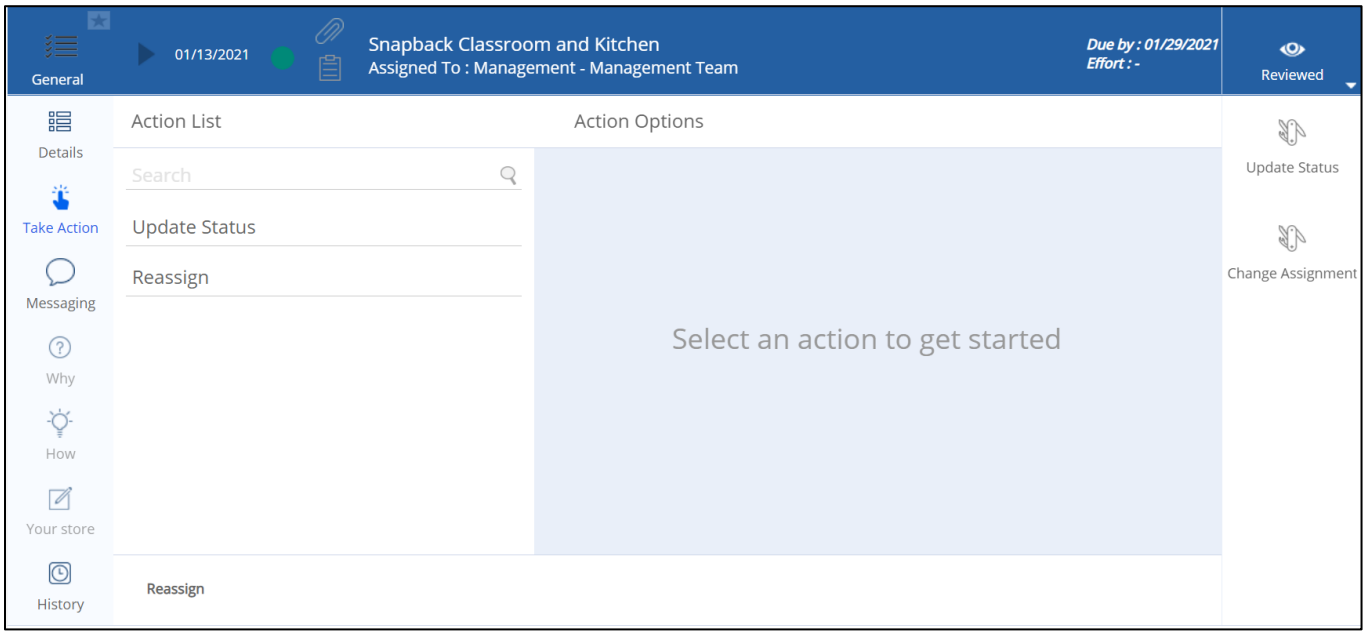
There can be visual text differences for project titles to signify a regular project, an overdue project, and an edited project.

Red project title text indicates when a project becomes overdue.

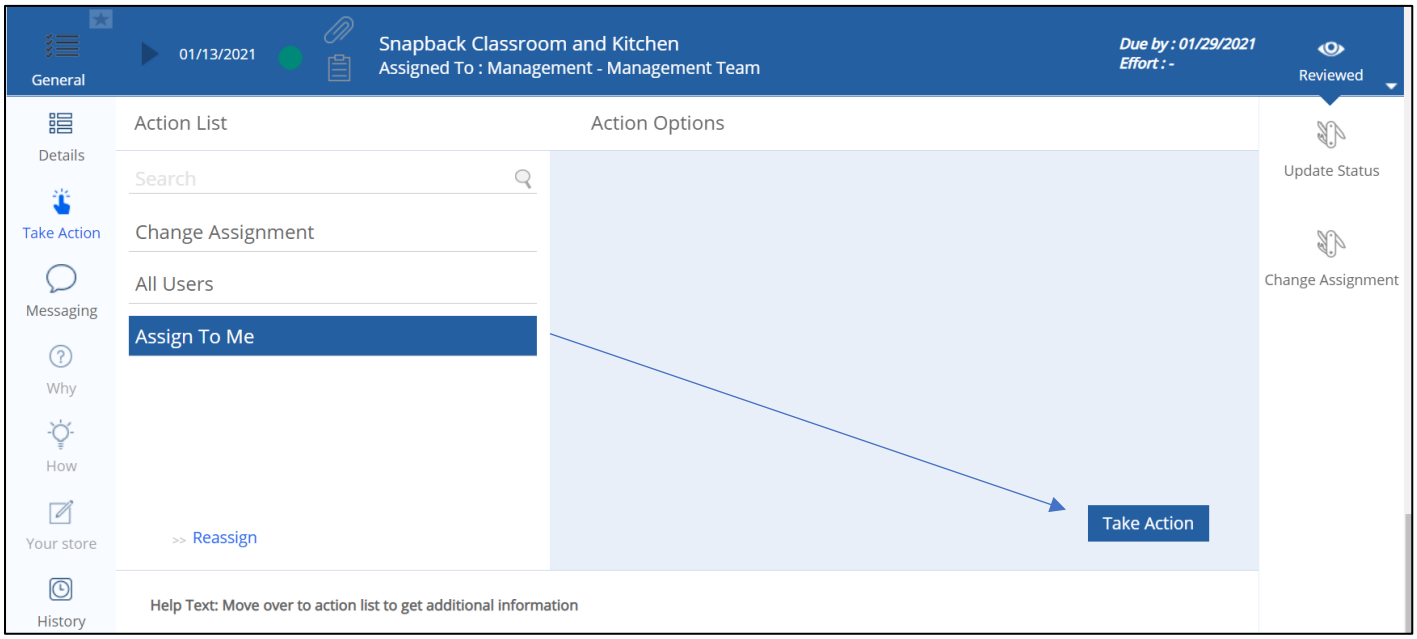


Bolded project title text indicates when a Reflexis Project Creator (SSC/Field Leadership) makes an edit to a project after it has launched.

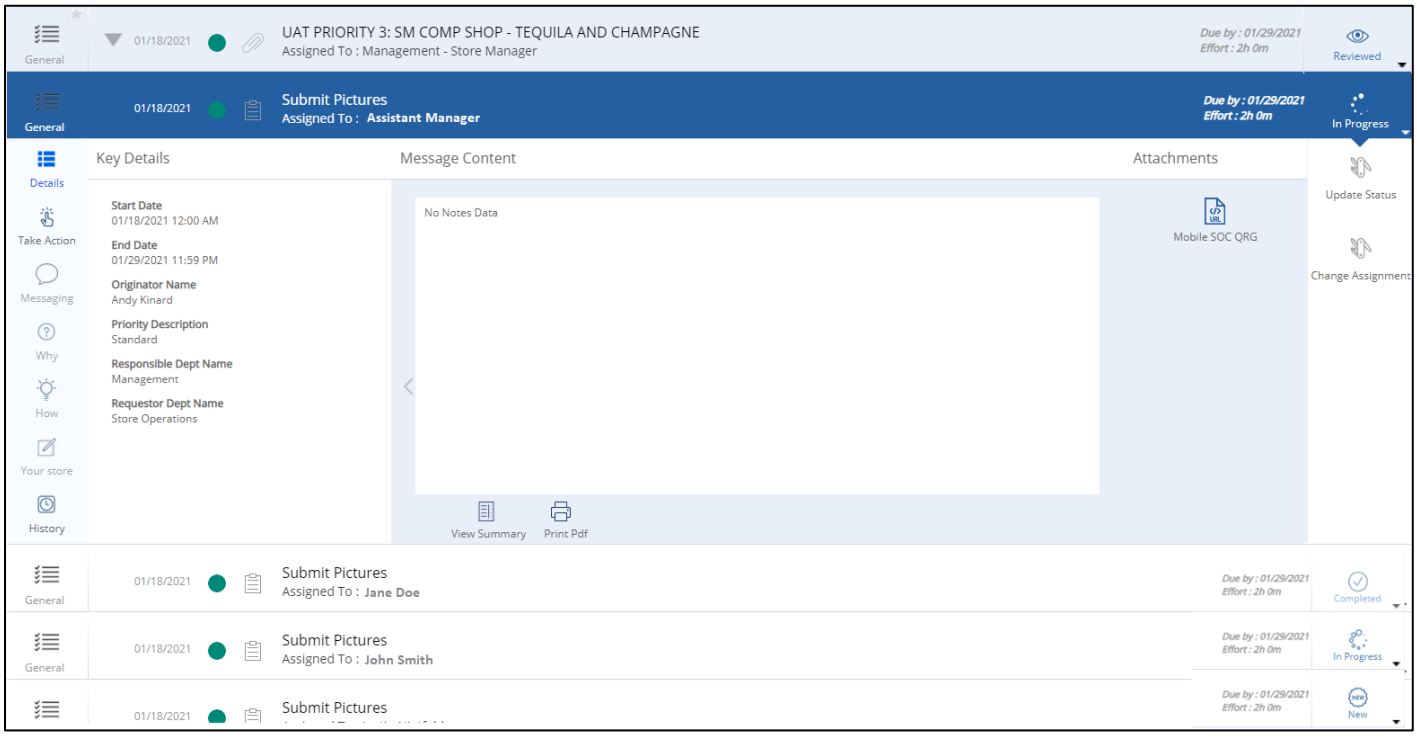
To update or reassign a project, click on the project title. It will open the project to view more options. Click "Take Action" from the row of icons on the left.



- **Reassign** will allow Store Managers and Assistant Managers to reassign the project to a specific Team Member, Department, or simply assign to themselves by clicking **Assign to Me**.
    - After selecting the correct reassignment, click **Take Action** in the lower right corner of the project view



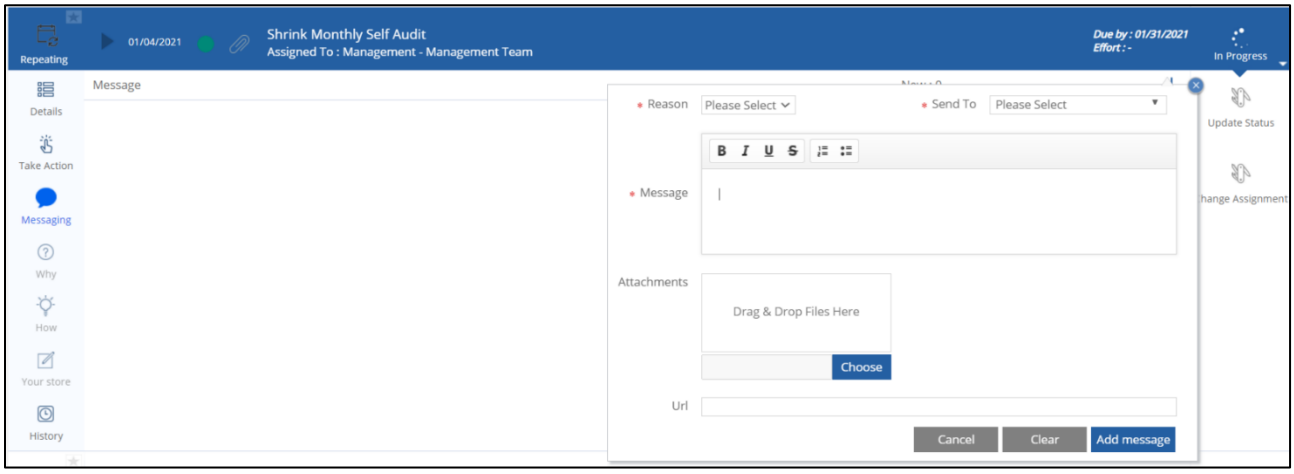
- **Update Status** changes the project status to **In Progress** or **Complete**
  - Note: If the project has subtasks, these will need to be marked complete prior to marking the main project complete.



OPENING A MESSAGE FROM THE PROJECT

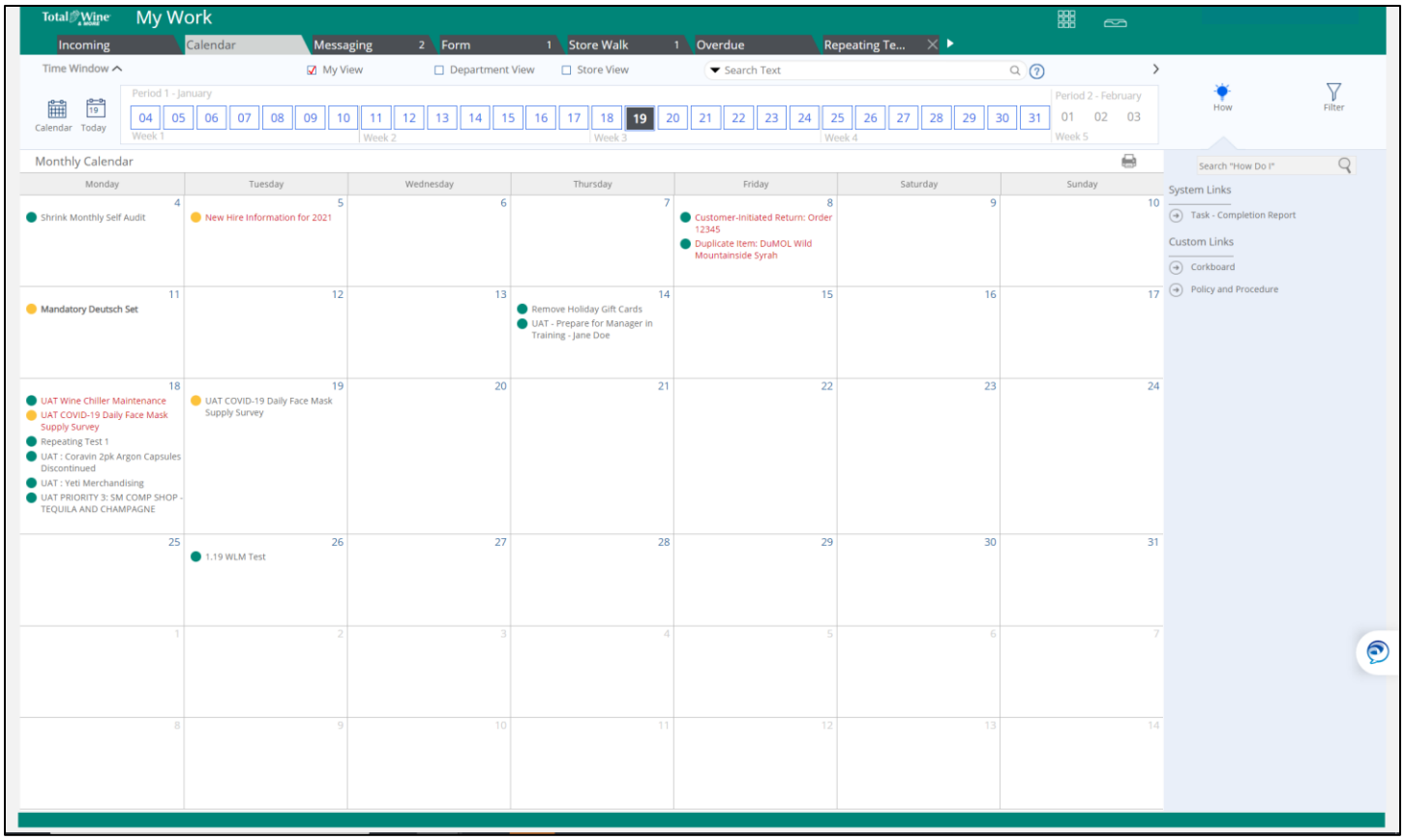
Messaging allows users to ask questions or provide feedback about a particular project to the correct SSC department or to the district manager.

- Click the **messaging icon** from within a project
- Click the **+** sign
- A new window pops open
- Fill all entry fields with the red asterisk (*)
    - Click **Reason** and select Reason option from the drop-down
    - Click **Send To** and select preferred Recipient from the drop-down
    - Write a comment
- Choose or Drag & Drop files to attach if applicable
- Click **Add message** to submit



5. CALENDAR

The Calendar tab displays all currently assigned projects in a block calendar format.

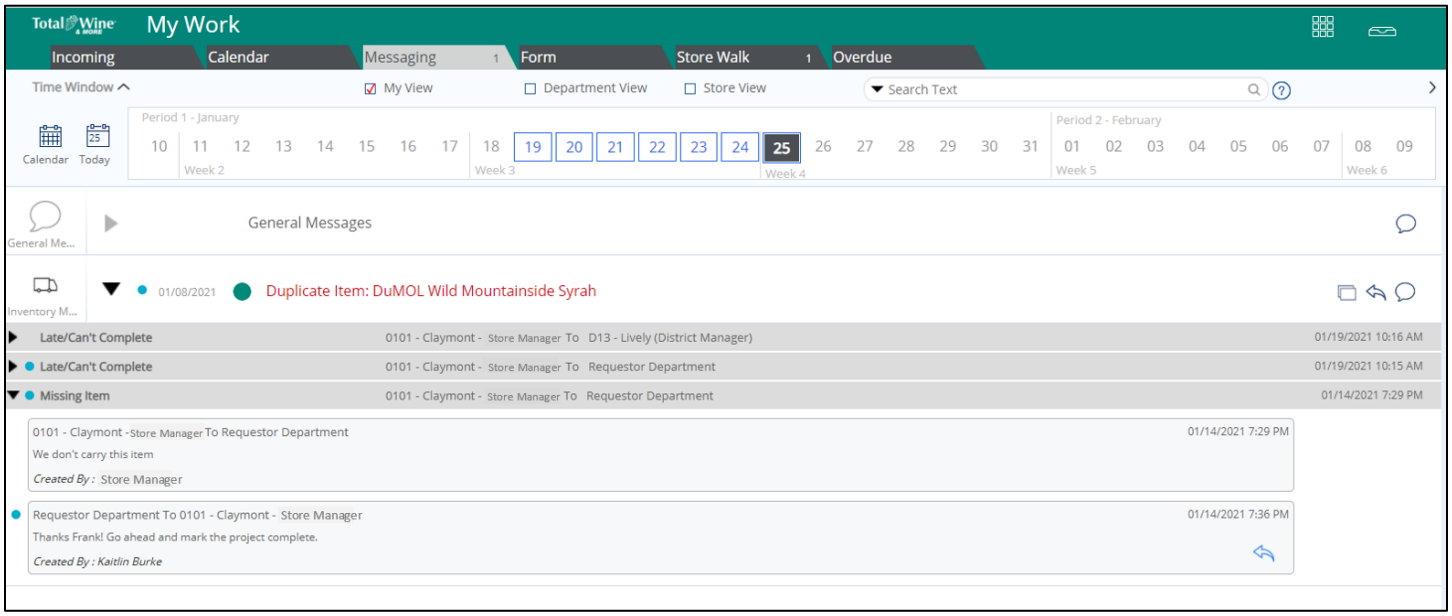


- To view project details, click on the project title
- Use filter options from the Right Pane to filter by status of projects

6. MESSAGING

The Messaging tab contains functions to view, reply to, and manage messages.

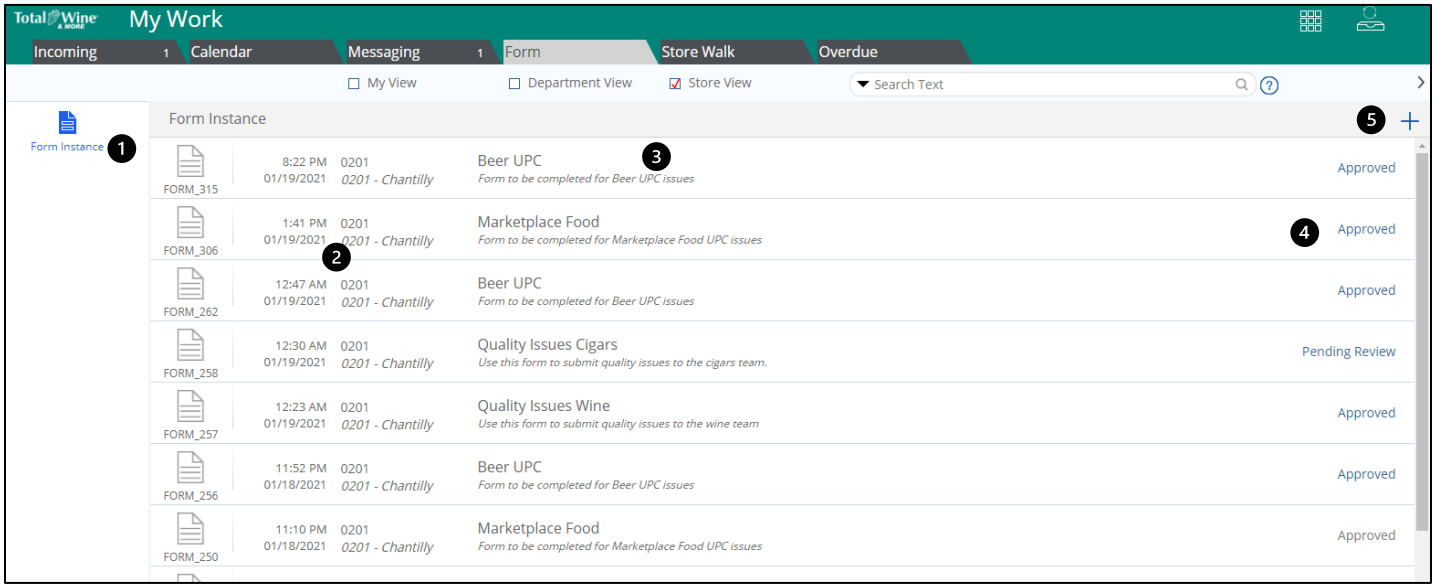
The layout of the Messaging tab is similar to the Incoming tab, with options to change dates with the calendar bar or to switch between My View, Department View, and Store View (for management). Here the user can see all open messages against projects and the conversation trail between the store and the SSC or District Manager.



7. FORMS

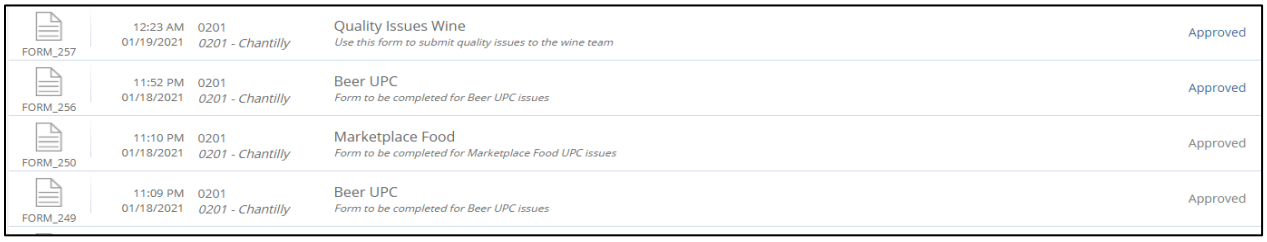
A Form is a data collection source used to communicate issues and feedback to the appropriate SSC department.

On the **Form** tab, users will see a list of all forms that have been submitted to the SSC or are still in progress and will also have the option to submit a new form.



No.	Icon	Description
1		Form Instance. Each submission of a form is referred to as an Instance and is assigned a reference number
2	n/a	Time, date, and store that submitted the form instance
3	n/a	Form title
4	n/a	Form status: • **Approved** indicates the form has been submitted and approved by the corresponding SSC department • **Pending Review** indicates the form has been submitted to the SSC but has yet to be reviewed or actioned by the SSC department • **Incomplete** means the form was started by your store, but it has not yet been submitted
5		Submit a new form

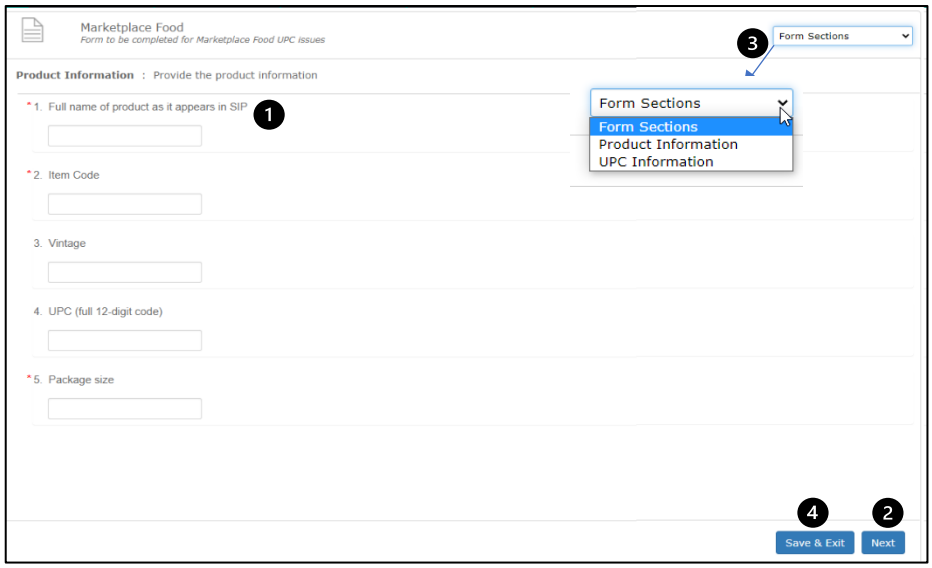
When a form has been submitted by the user, the status appears in **blue text;** if the form was submitted by another team member in the store, the status appears in **gray text**.



To open a new form:

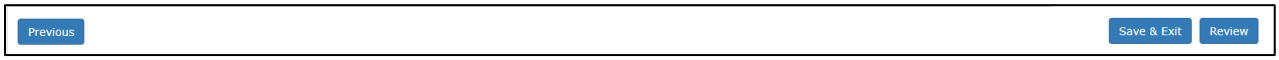
- Select the "+" sign in the top right corner
- Select the appropriate Form template from the list:

A new tab will open with the Form name as the header:

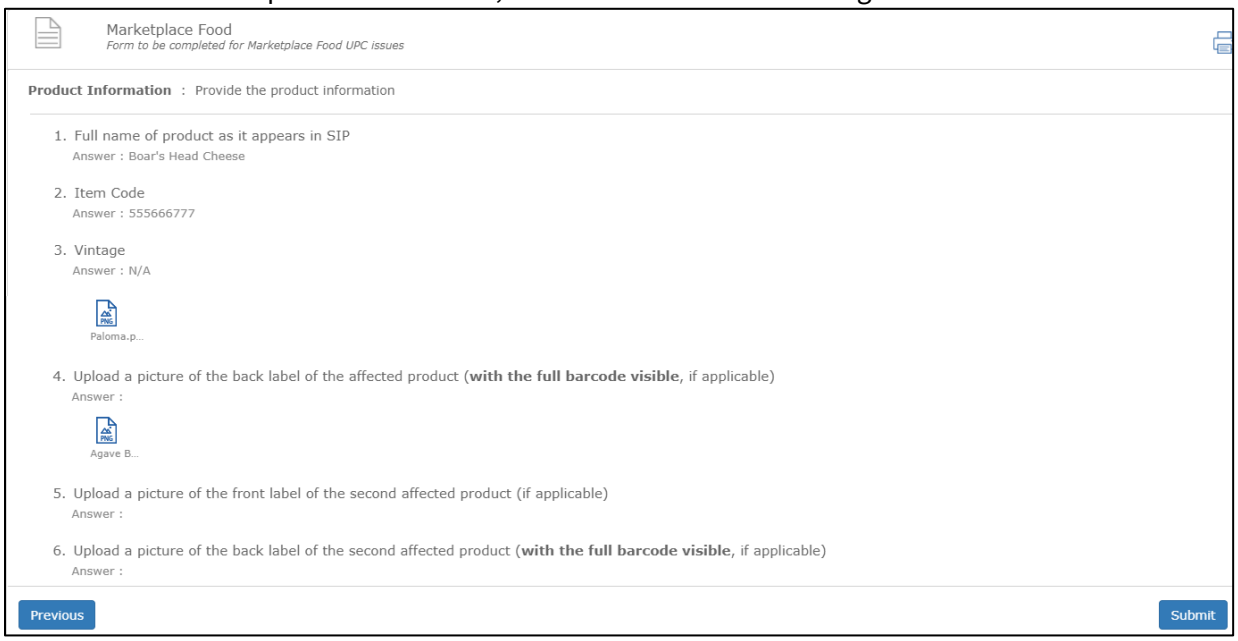


No.	Description
1	Fill out the fields (required fields are marked with an asterisk)
2	Next: Takes you to the following section of the form
3	Section Navigation: The dropdown in the top right can be used to move between sections
4	Save & Exit: Used to save responses if the form is not ready to submit

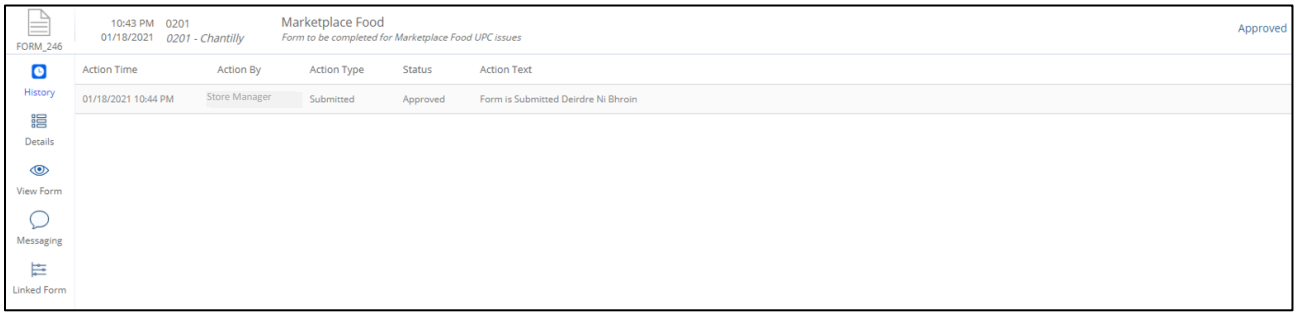
Once all information has been filled out, you will have a chance to review all answers before submitting:



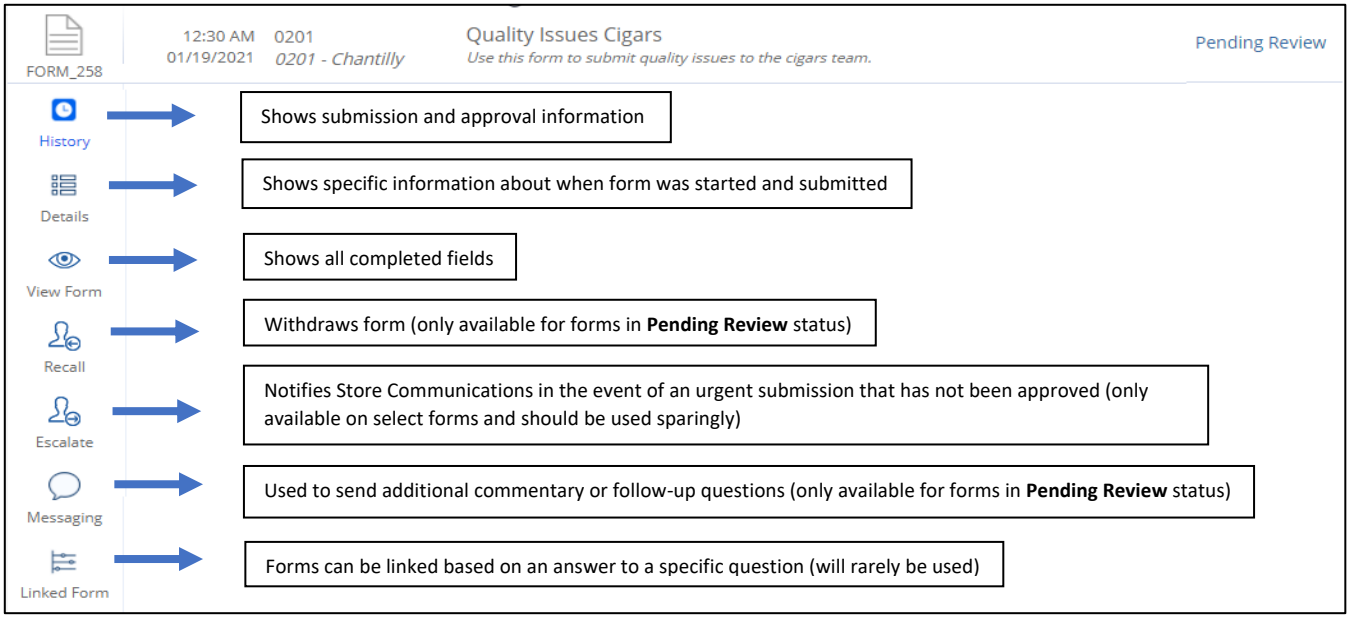
When the form is complete and accurate, click Submit in the bottom right corner.



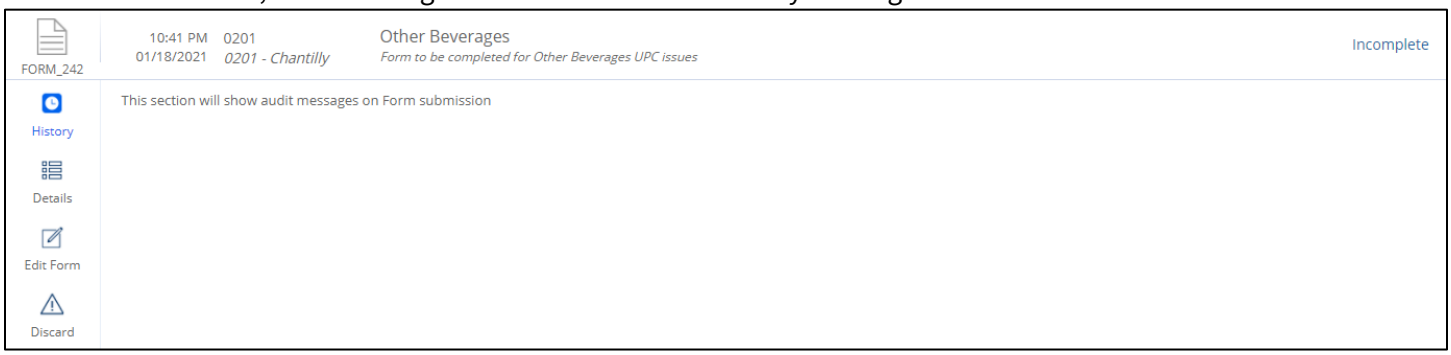
To view form information, click on the name of the form instance:



On the left side of the screen, you will have several different options:



A form that was started but not submitted will appear as **Incomplete**. To finish submitting the form, click **Edit Form** on the left side menu; if it is no longer needed it can be deleted by clicking on the **Discard** icon.

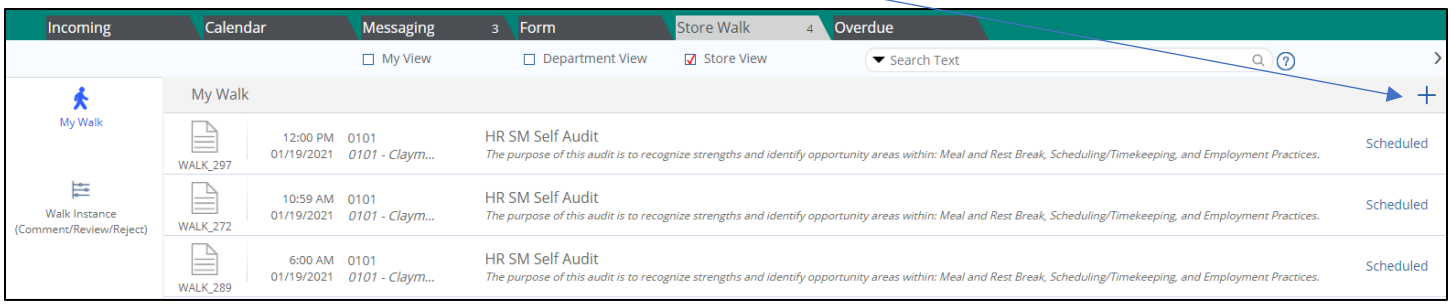


8. STORE WALK

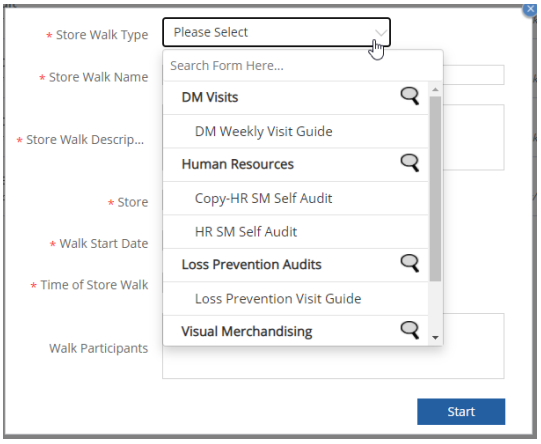
The Store Walk tab contains audits that are scored and may require corrective action for failed questions. Walks can be scheduled to complete at a specific time or can be completed as needed. Not all profiles will be able to complete Walks; availability is based on your TWM role level.

On the Store Walk tab, users will see a list of all walks that are scheduled, that have been submitted to the SSC, or are still in progress. It will also provide the option to complete a new walk.

To complete a new walk, click the + in the top right corner.



Select the Store Walk Type from the dropdown menu:



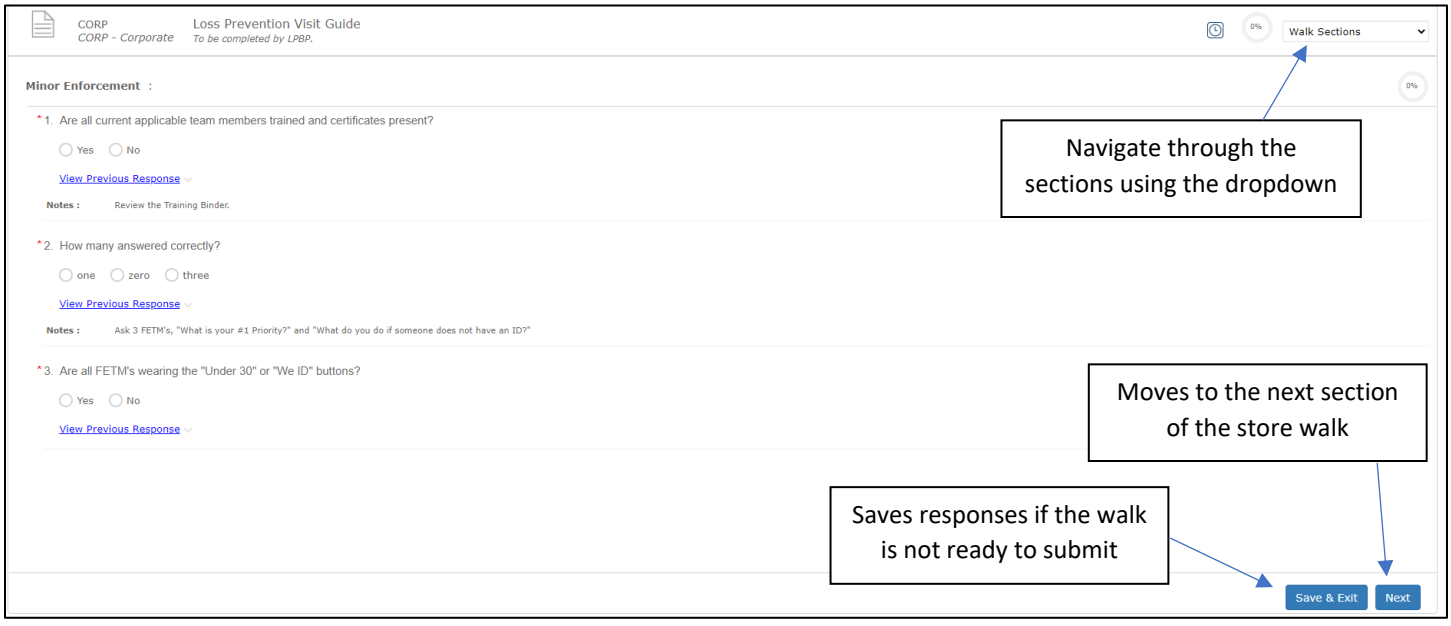
To complete a scheduled walk, click on the name of the walk and then click **Record Response** in the bottom right corner to begin. Scheduled walks can be accessed from the Incoming screen or from within the Store Walks tab.

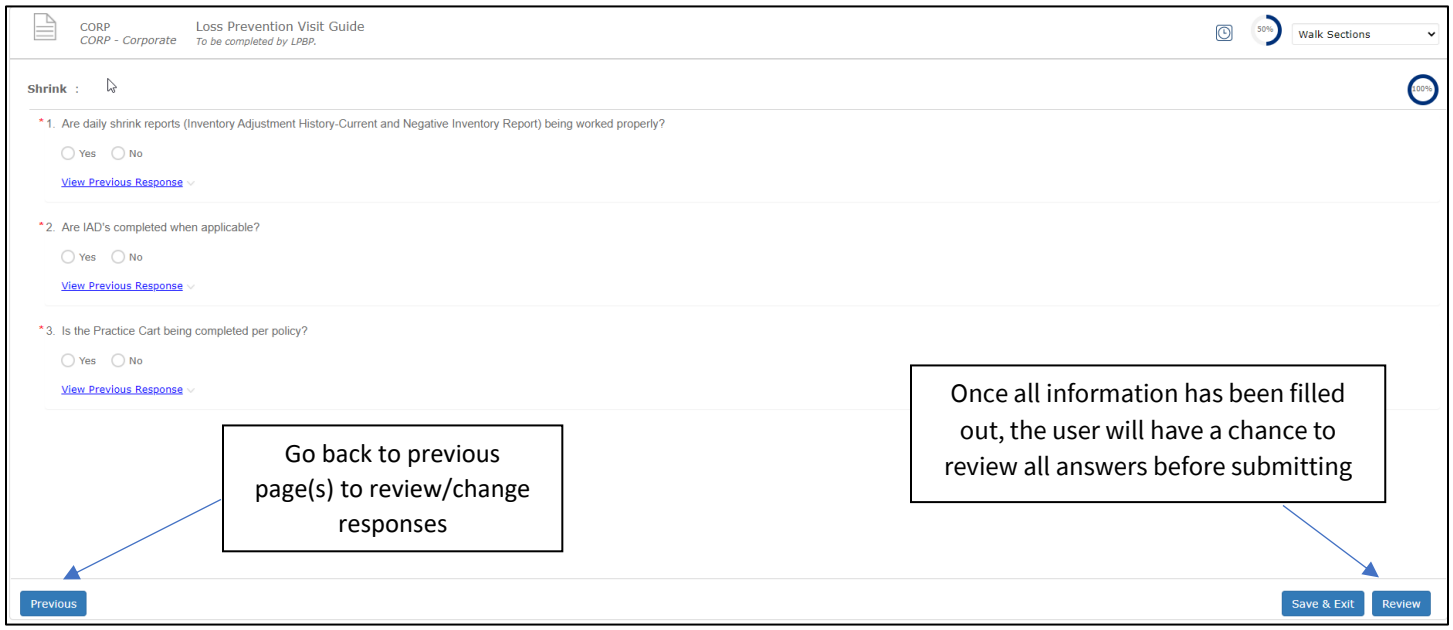
Incoming Project Tab:

Store Walks tab:

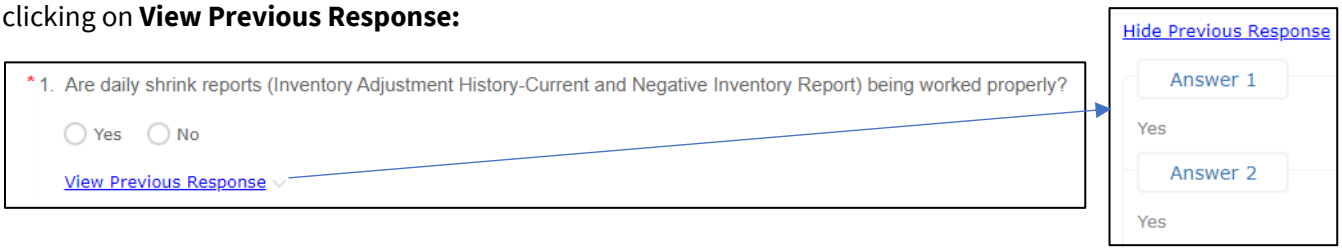
Respond to each question; required questions are marked with an asterisk.

Navigation through store walks is similar to forms.

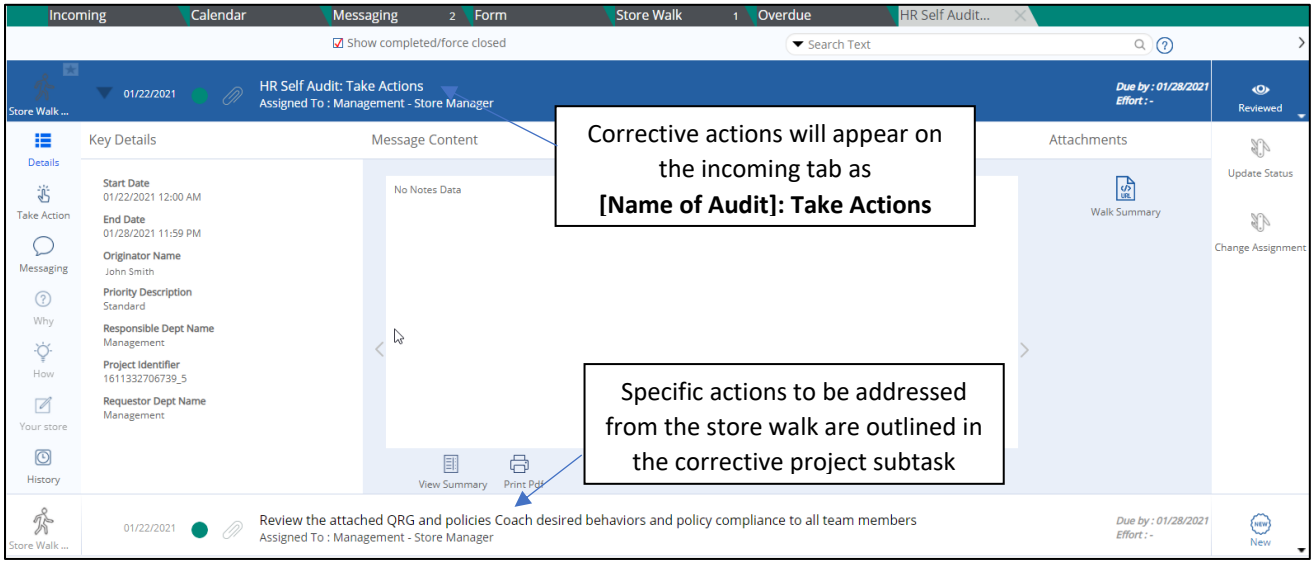




If a store walk has been completed before, the user can view how they've responded to each question before by clicking on **View Previous Response:**



Some walks will have corrective actions associated with select questions.



9. OVERDUE

Projects include a due date set by the SSC defining when project work must be complete. Projects not updated to Complete within the time allotted generate exceptions in Reflexis with notifications/alerts sent to appropriate users. In addition to the Incoming tab, overdue projects will be consolidated in the Overdue tab.

The status icon will also show **Overdue**, and the only status update option available is **Complete**.

10. TROUBLESHOOTING

WEB BROWSER NAVIGATION BUTTONS

The back and forward buttons on a web browser do not function within the Reflexis Work Platform. Use the tabs and How Do I Links to navigate through the system.

SESSION TIME OUT

Reflexis automatically ends a user session when no activity occurs for 30 minutes. If a session time out is approaching, a notification displays to let you know. Frequently save your work during Reflexis software sessions. If a software time out occurs, work not saved is lost.

WHO TO CONTACT

Store Managers should be the first point of contact for any issues or questions about Reflexis. If an employee needs more assistance, please open an IT service desk ticket.