

## Quick Reference User Guide E

### Task Functionality

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Within a project, you can assign two different types of tasks: Simple and Advanced.

- **Simple**- allows you to assign a basic task with a due date
- **Advanced**- provides more functionalities such as approval sequences, frequent reminders, and required tasks.

First, find your project by using the Project Search. Type in the title of the project or grant and click on the appropriate result to access the Project Dashboard:

**Project Search**

Search for Project

See help popup for advanced search syntax. ?

CAEP

- CAEP R1 - 36008902045028 FY2018 (36008902045028)  
ORG0121-AS - California Aquatic Resource Education Program (G1898023)
- CAEP R2 - 36008902045029 FY2018 (36008902045029)  
ORG0121-AS - California Aquatic Resource Education Program (G1898023)
- CAEP R3 - 36008902045030 FY2018 (36008902045030)  
ORG0121-AS - California Aquatic Resource Education Program (G1898023)

At the bottom of the page, click on “+Add Task”:

Pending Tasks | **Completed Tasks** | Approval History

Task Name	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
Contract Close	ORG0121-AS: FY2018	Funding Allocated	A. Ibarra	06/30/2019			

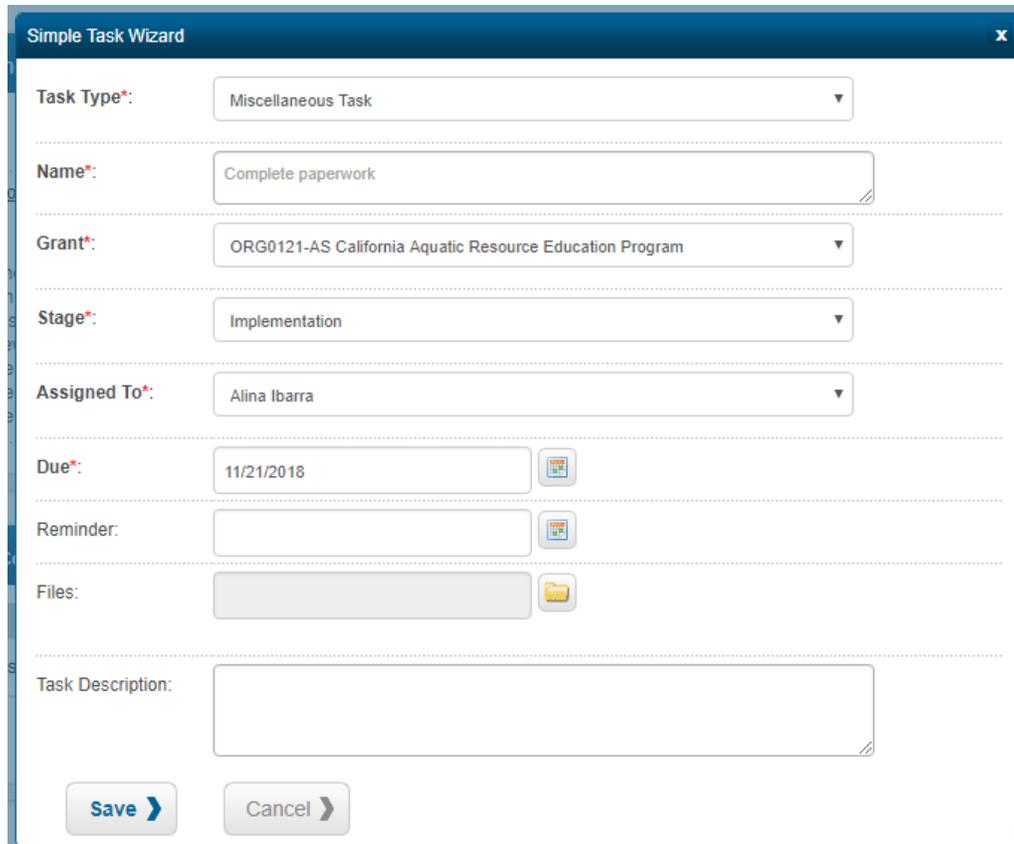
**+ Add Task** | Task Report | Refresh

Select if the task will be Simple or Advanced. Click on “Cancel” to and then “+Add Task” to restart the sequence if you determine you need a different task type.

## Simple Tasks

Simple tasks can be assigned to a user or user group for completion. If a user group is assigned, anyone from the group can complete the task.

Complete all required fields, marked with a red asterisk. Assign the task to the person who will be responsible for ensuring the task is complete:



The screenshot shows a "Simple Task Wizard" window with the following fields and values:

- Task Type\*:** Miscellaneous Task
- Name\*:** Complete paperwork
- Grant\*:** ORG0121-AS California Aquatic Resource Education Program
- Stage\*:** Implementation
- Assigned To\*:** Alina Ibarra
- Due\*:** 11/21/2018
- Reminder:** (empty)
- Files:** (empty)
- Task Description:** (empty)

At the bottom, there are "Save" and "Cancel" buttons.

Click “Save” and the task will appear in the Pending Tasks list.

## Advanced Tasks

Advanced tasks provide more functionalities, such as being set as required before the grant can be moved to the next stage, setting a sequence of approval, or setting reoccurrence and frequency.

If there are scheduled reports to submit regularly, you will want to use the Advanced Task option. This provides the option to repeat the task, send reminders, and can be customized.

A step-by-step guide to creating the task can be activated by clicking on the question mark in the top left corner. You must click on the Steps at the top to continue the step-by-step guide.

In Step 1, complete all required fields, marked with a red asterisk:

The screenshot shows the 'Advanced Task Wizard' window at Step 1. At the top, there are five buttons labeled 'Step 1', 'Step 2', 'Step 3', 'Step 4', and 'Step 5'. Below the buttons are several form fields, each with a red asterisk indicating it is required:

- Task Type\*:** A dropdown menu with 'Miscellaneous Task' selected.
- Name\*:** A text input field containing 'Complete paperwork'.
- Grant\*:** A dropdown menu with 'ORG0121-AS California Aquatic Resource Education Program' selected.
- Stage\*:** A dropdown menu with 'Implementation' selected.
- Files:** A text input field followed by a folder icon.
- Task Description:** A large text area.

In Step 2, specify if the task will be standard, which can be approved by a user or anyone in a user group, or sequential, which must be approved by a specific order of people before the task can be completed.

Click "Required" if the task must be completed before the grant or award can be moved to the next stage:

The screenshot shows the 'Advanced Task Wizard' window at Step 2. At the top, there are five buttons labeled 'Step 1', 'Step 2', 'Step 3', 'Step 4', and 'Step 5'. Below the buttons is a section titled 'Task Options' with the following settings:

- Approval**
  - Standard  
'Standard' approvals require an approval by an assigned approver or member of an approval group. In a group, any member can approve.
  - Sequential  
'Sequential' approvals are those that require each approval group member to approve in a specific order, one after another.
- Required**  
The 'required' flag blocks the grant from moving to the next stage if the task has not been completed.

In Step 3, the Assigned To box should be the person who will ultimately complete the task. If you chose Standard Approval in Step 2, then the approval can be performed by anyone in the User Group. If you chose Sequential Approval in Step 2, the task will move through the person or group set as Designated for Approval before it can be completed by the person set as Assigned To.:

The screenshot shows the 'Advanced Task Wizard' window at Step 3. At the top, there are five step buttons: Step 1, Step 2, Step 3 (highlighted), Step 4, and Step 5. Below the steps, the 'Assigned To\*' field is a dropdown menu with 'Alina Ibarra' selected. Under the 'Designated for Approval\*' section, there are two radio button options: 'User' (unselected) and 'User Group' (selected). Below the 'User' option is the text 'Choose a user that will be designated as approver' and two dropdown menus: 'Select Department' and 'Select User'. Below the 'User Group' option is the text 'Choose a user group that will be designated for approval. The group is based off Approval Type in previous step.' and a dropdown menu with 'USFWS' selected.

To learn how to create a User Group, refer to the Approval Groups section of this manual.

In Step 4, set the Due Date and a Reminder Date:

The screenshot shows the 'Advanced Task Wizard' window at Step 4. At the top, there are five step buttons: Step 1, Step 2, Step 3, Step 4 (highlighted), and Step 5. Below the steps, the 'Due\*' field is an empty text box with a calendar icon to its right. Below the 'Due\*' field is a horizontal dashed line. Below the dashed line, the 'Reminder:' field is an empty text box with a green plus icon to its left and a calendar icon to its right.

In Step 5, you can select if the task will repeat or happen only once. Select “Repeat” if this task is meant to be completed more than once. You can select weekly or monthly frequency, when the task will be due, and the frequency of task reminders:

The screenshot shows the 'Advanced Task Wizard' window at Step 5. The 'Task Recurrence' section is active, with 'Task repeats' selected. The configuration is as follows:

- Frequency\*: Weekly
- Interval\*: Every 3 weeks
- On\*: Tue
- Starting\*: 11/22/2018
- Create\*: Two days before due date
- Create with a reminder
- Until: 12/20/2019

Buttons at the bottom include 'Previous', 'Save', and 'Cancel'.

Click “Save” and the task will appear in the Pending Tasks list.

## Approval Groups

To create or edit a group that can be used in the task approval process, go to the Administration tab and select Group Manager:

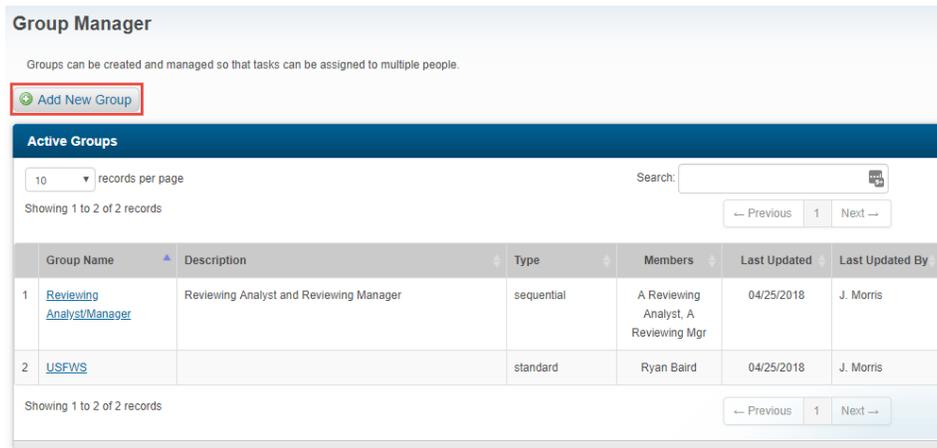
The screenshot shows the eCIVIS interface. The 'Administration' tab is selected in the top navigation bar. A dropdown menu is open, showing the following options:

- My Account
- My Preferences
- Organization Preferences
- Organization Library
- Organization Programs
- Funding Sources
- Account Manager
- Group Manager**

The 'Group Manager' option is highlighted with a red box. Below the navigation bar, there are buttons for 'Research Find Grants' and 'Tracking & Reporting Manage Grants'. An 'Organization Activity Summary' table is also visible.

Open Projects	Applications Due	Applications Submitted	Funding Awarded	Post Award Reports Due
481	0	0	172	0

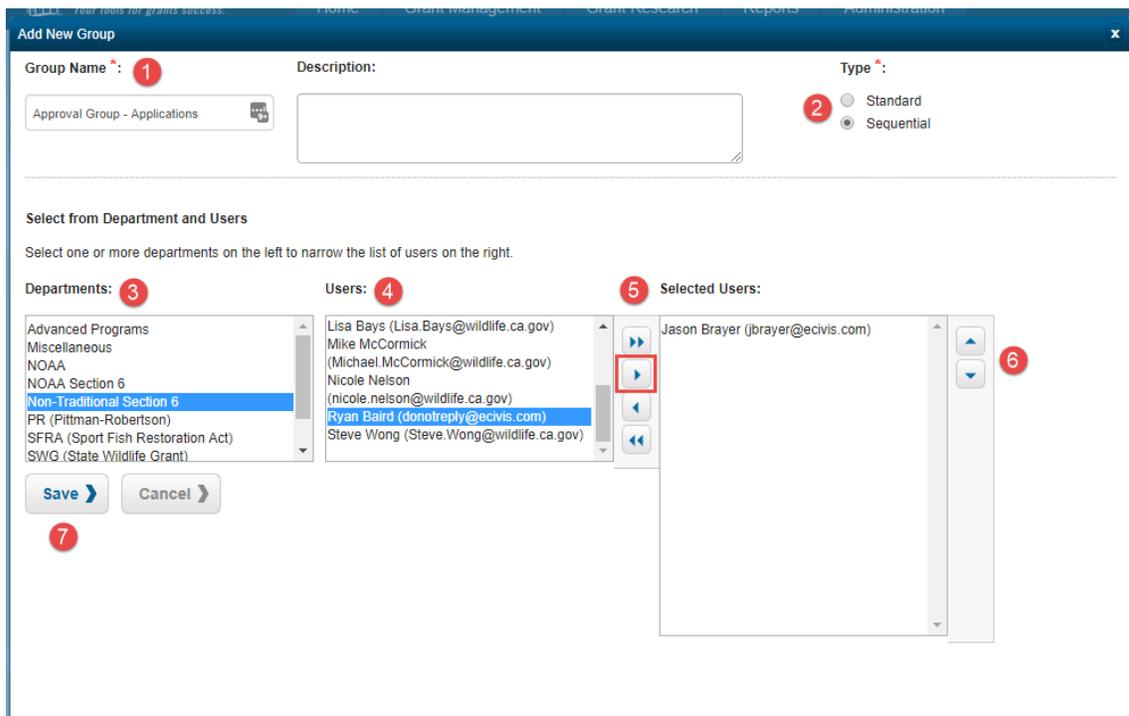
Click on “+Add New Group” to create a new user group or the Group Name to edit the group:



Complete the required fields, marked by a red asterisk, including the group name and setting the group as a standard group or sequential group. Select the group users by clicking on a Department, then a user, and the single right arrow. Click on the right double arrows to move all of the users within the department into the User Group.

Use the up and down arrows to set the sequence of approvers. If Sequential, the task will move from the top user to the bottom user. If Standard, anyone in the group may approve.

Remove users by clicking on their name from the Selected Users column and clicking on the single left arrow. Clicking on the double left arrow will remove all users from the Selected Users column:



Click “Save” and your new approval group will appear in the list of Active Groups.

When creating tasks, you can assign tasks to the group of your choice. The Group will also appear as an option in the list of User Groups in Designated for Approval lists when creating tasks.

**Group Manager**

Groups can be created and managed so that tasks can be assigned to multiple people.

[Add New Group](#)

**Active Groups**

10 records per page Search:

Showing 1 to 3 of 3 records

← Previous 1 Next →

Group Name	Description	Type	Members	Last Updated	Last Updated By
1 <a href="#">Review Applications</a>	Applications must be approved by the following users before submission	sequential	Ryan Baird, Nikita Dudley, Alina Ibarra	11/27/2018	J. Brayer
2 <a href="#">Reviewing Analyst/Manager</a>	Reviewing Analyst and Reviewing Manager	sequential	A Reviewing Analyst, A Reviewing Mgr	04/25/2018	J. Morris

## Template Tasks

Template tasks are tasks that are automatically created and assigned to a grant, depending on the stage they are assigned to. If a grant reaches the template task’s stage, it will be automatically assigned to the Project Lead.

Access the template tasks by going to the Administration tab and selecting Organization Library:

The screenshot shows the eCIVIS interface. At the top, there is a navigation bar with tabs: Home, Grant Management, Grant Research, Reports, and Administration. The Administration tab is selected and highlighted with a red box. Below the navigation bar, there are several main sections: Research (Find Grants), Tracking & Reporting (Manage Grants), and Organization Activity Summary. The Organization Activity Summary section contains a table with the following data:

Open Projects	Applications Due	Applications Submitted	Funding Awarded	Post Award Reports Due
481	0	0	172	0

On the right side, a dropdown menu is open for the Administration tab, listing various options: My Account, My Preferences, Organization Preferences, Organization Library (highlighted with a red box), Organization Programs, Funding Sources, Account Manager, and Group Manager. Below the dropdown menu, there is a section for 'No past due items.'

Under Organization Template, click on the pencil icon:

**Organization Library**

Organization Template			
	Last Updated	Last Updated By	Edit
Grant Process	11/20/2018	R. Baird	

Click on “+Add New Task” to create a new template task:

**Template Task Management**

[+ Add New Task](#)

Grant Process Template						
Task	Stage	Dept	Req'd Task?	Approver	Enabled	Download Files
<a href="#">Upload 889 Transmittal</a>	Application Preparation	SFRA (Sport Fish Restoration Act)	No	N/A	No	
<a href="#">Upload Narrative</a>	Application Preparation	SFRA (Sport Fish Restoration Act)	No	N/A	No	
<a href="#">Upload Budget Detail</a>	Application Preparation	SFRA (Sport Fish Restoration Act)	No	N/A	No	
<a href="#">Upload Duty Statements</a>	Application Preparation	SFRA (Sport Fish Restoration Act)	No	N/A	No	
<a href="#">Upload Maps</a>	Application Preparation	SFRA (Sport Fish Restoration Act)	No	N/A	No	

Complete all required fields, marked with a red asterisk. Select the departments that will complete this task. The Grant Stage will determine when the template task will be created in the grant lifecycle. You can also add attachments, such as forms to be completed, make it a required task, set as Standard or Sequential Approval, and set approvers or approval groups.

**Add New Task**

NOAA Section 6

**Grant Stage \*:** Application Preparation

Attachments: 

**Required Task? \*:**  Yes  No (A required task blocks a grant status change until completed)

**Approval Task? \*:**  Yes  No

**Approval \*:**  Standard  Sequential

**Designated for Approval \*:**

User

Select Department

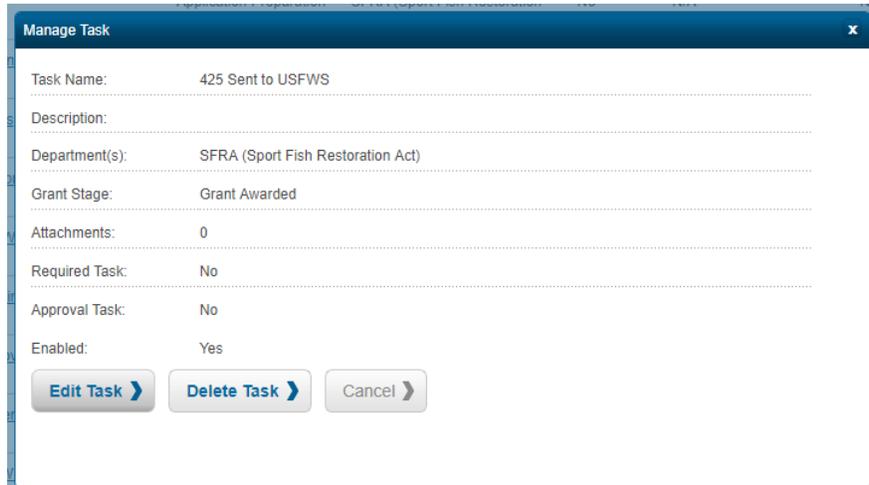
User Group

Review Applications

## Enable the Template Task

A task can be enabled or disabled at any time. If disabled, the template task will not automatically be created when the grant reaches its Grant Stage.

Click on the Task name to edit the template task, then click Edit Task:



The 'Manage Task' dialog box displays the following information:

- Task Name: 425 Sent to USFWS
- Description:
- Department(s): SFRA (Sport Fish Restoration Act)
- Grant Stage: Grant Awarded
- Attachments: 0
- Required Task: No
- Approval Task: No
- Enabled: Yes

Buttons at the bottom: Edit Task, Delete Task, Cancel.

At the bottom of the window, click on Yes to enable the task or No to disable the task. Then click Save to save the update:



The bottom section of the dialog box contains the following options:

- Required Task?\*:  Yes  No (A required task blocks a grant status change until completed)
- Approval Task?\*:  Yes  No
- Enabled\*:  Yes  No

Buttons at the bottom: View Task, Save, Cancel.