Quick Reference
User Guide E

Task Functionality

Sections in this user guide:

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:

At the bottom of the page, click on "+Add Task":
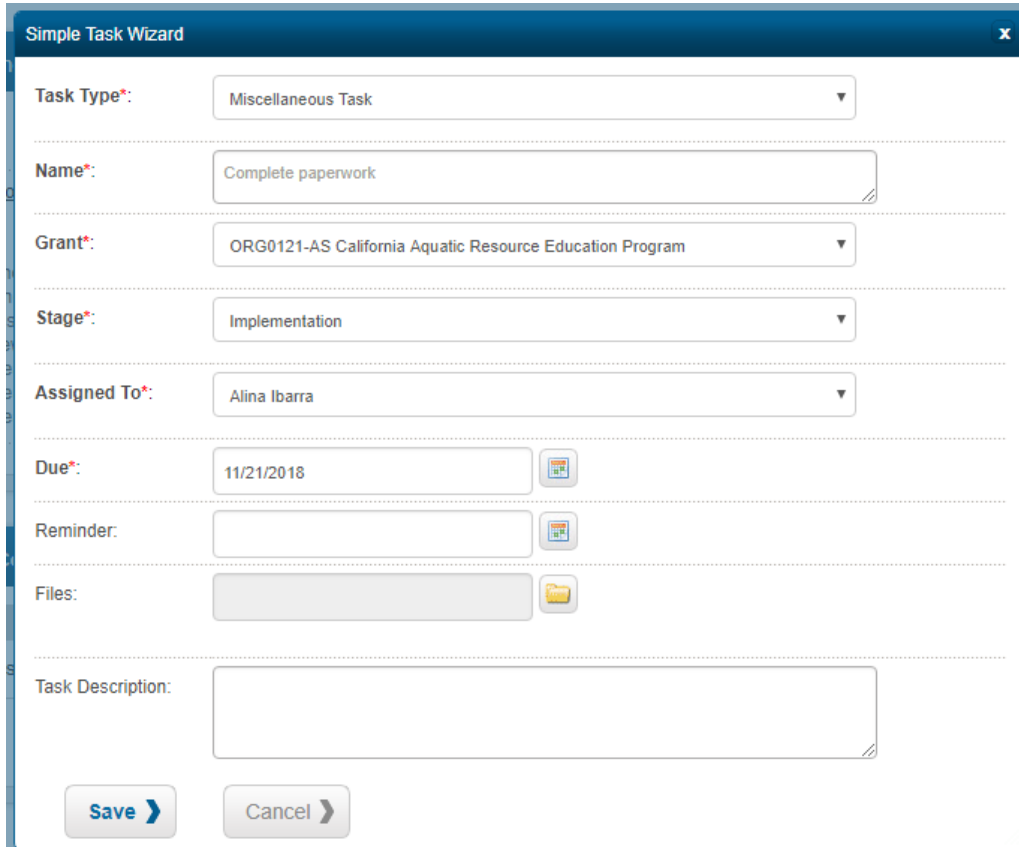
Select if the task will be Simple or Advanced. Click on "Cancel" to and then "+Add Task" to restart the sequence if you determine you need a different task type.

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:

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:

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:

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.:

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:

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:

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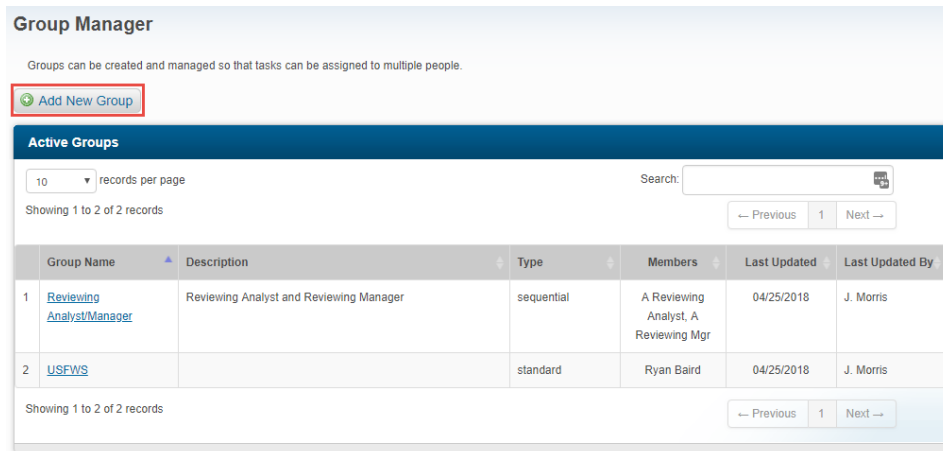
Click on "+Add New Group" to create a new user group or the Group Name to edit the group:

Group Manager

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

⊕ Add New Group

Active Groups						
	records per page				Search:	
	Showing 1 to 2 of 2 records				← Previous 1 Next →	
	Group Name	Description	Type	Members	Last Updated	Last Updated By
1	Reviewing Analyst/Manager	Reviewing Analyst and Reviewing Manager	sequential	A Reviewing Analyst, A Reviewing Mgr	04/25/2018	J. Morris
2	USFWS		standard	Ryan Baird	04/25/2018	J. Morris
	Showing 1 to 2 of 2 records				← Previous 1 Next →	

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:

Add New Group

Group Name *: ①
Approval Group - Applications

Description:

Type *: ②
○ Standard
● Sequential

Select from Department and Users

Select one or more departments on the left to narrow the list of users on the right.

Departments: ③

Advanced Programs
Miscellaneous
NOAA
NOAA Section 6
Non-Traditional Section 6
PR (Pittman-Robertson)
SFRA (Sport Fish Restoration Act)
SWG (State Wildlife Grant)

Users: ④

Lisa Bays (Lisa.Bays@wildlife.ca.gov)
Mike McCormick (Michael.McCormick@wildlife.ca.gov)
Nicole Nelson (nicole.nelson@wildlife.ca.gov)
Ryan Baird (donotreply@ecivis.com)
Steve Wong (Steve.Wong@wildlife.ca.gov)

⑤

Selected Users:

Jason Brayer (jbrayer@ecivis.com)

⑥

Save ❭ Cancel ❭
⑦

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.

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:

Under Organization Template, click on the pencil icon:

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

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.
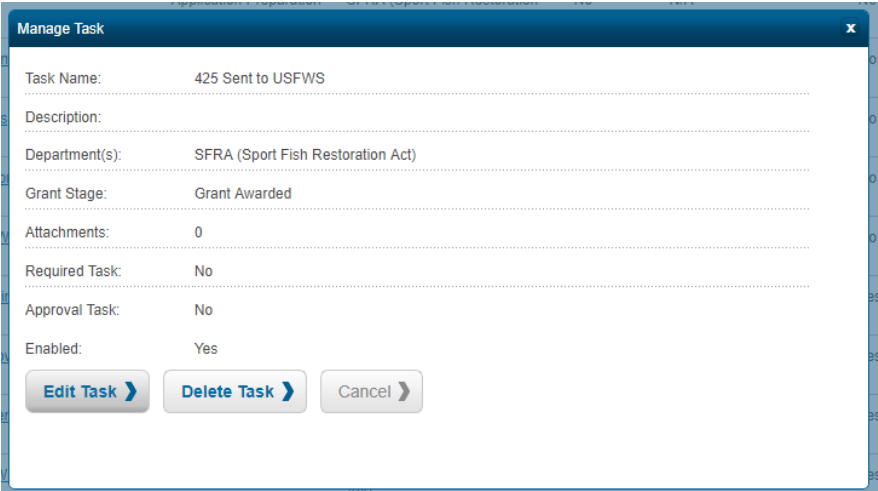
Enable the Template Task

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:

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: