Managing Tasks in eCivis – State as Grantee

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Task Functionality and Helpfulness

The task functionality in eCivis allow you to streamline business processes in a central hub. You can assign tasks to yourself and colleagues, set up approvals, create recurring tasks, and upload documents to share with team members.

This guide will assist you in selecting the task type that is best for your needs, and learn how to best implement that task within the eCivis system.

Selecting Appropriate Task Type

Simple vs. Advance Tasks

eCivis has two task options, simple and advanced. The complexity of the task you are creating will determine which task type to choose. See below to determine which fits your needs best.

Simple Tasks have two roles:

1. User that creates the task

2. *Assigned To* – user or group the task is assigned to. The user that creates a task may assign it
   to themselves, to another user, or to a group. Assigned users are responsible for completing the task, and marking it *Done.*

Advanced Tasks have a third role:

3. *Approver* - user or group able to approve, reject, or request additional information. Approvers do
   not have access to the task until the Assigned users have marked it Done.

Simple Task: Allows for selection of task type, custom name, assigning task to specific user, task due date, task reminder date, and task description

Advanced Task: Includes functionality from simple task as well standard or sequential task approvals, option to block grant progress if task has not been completed, and task repetition option. You may want to upgrade to an advanced task if you

- o Want task to be approved by a single user or multiple people in a sequential order
- o Want to ensure grant is not moved into a new stage until this task is completed
- o Want a task to repeat on scheduled basis

Now that you have chosen a task type, please follow to user instructions below on the set up of a simple or advanced task, as well as examples of tasks that would fit into either category.

Setting Up Simple Task

1. Login to eCivis

2. Hover over the "Grants Management" tab and select "My Projects"
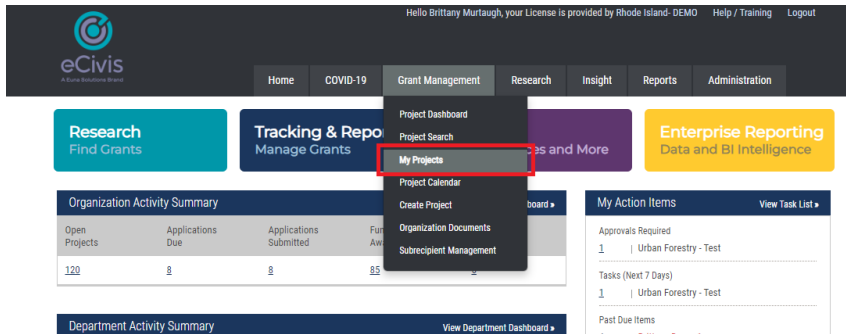
3. Select the project you would like to create a task for

4. Click on the "Add Task" button at the bottom of the screen

5. Select "Simple Task" and select next
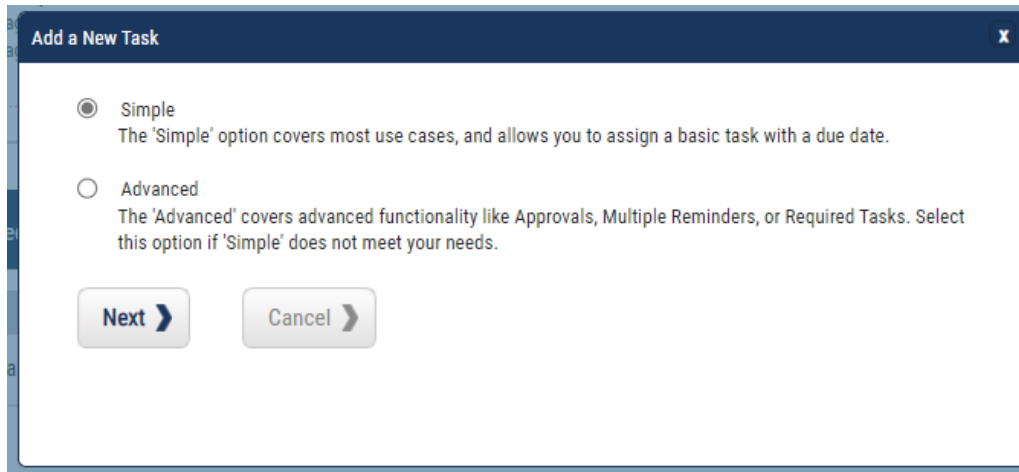
6. Select your task type
   o Miscellaneous tasks: Simple Yes or No tasks – typically used to mark something "complete"
   o Scheduled Report: Reports you may want periodically such as budget, program, updates etc. (see advanced task set up section)

7. Create a name for your task – make it descriptive enough so the people you are sharing with understand the meaning

8. Select the grant that is associated with the task you are creating

9. Assign the task to an individual or a user group
   o User groups can be created by Department Master Account Holders in the Administration – Group Manager tab in eCivis

10. Select a due date you want this task completed by the assignee
    a. Optional: Set a reminder date for the task assignee about their task
    b. Optional: Upload any files relevant to the task for the assignee to view
    c. Optional: Add a task description assignee has more information on what they are being asked to complete

11. Click Save

➢ TIP: Now that your task has been created, it will be active in eCivis and you will now be able to view it in your Project Dashboard. Other tasks that have previously been created and are unfinished will display here as well

➢ TIP: Any user you assigned to the task, or who was a member of the user group you assigned to review will get also get an email alerting them there is a task that needs their attention

Example of Simple Task Set Ups

Request Budget Review

A program staff person may want a finance colleague to check their budget breakdown in eCivis before locking the budget. A simple task can be created to request this review. See below for an example of how you may create this task in eCivis.
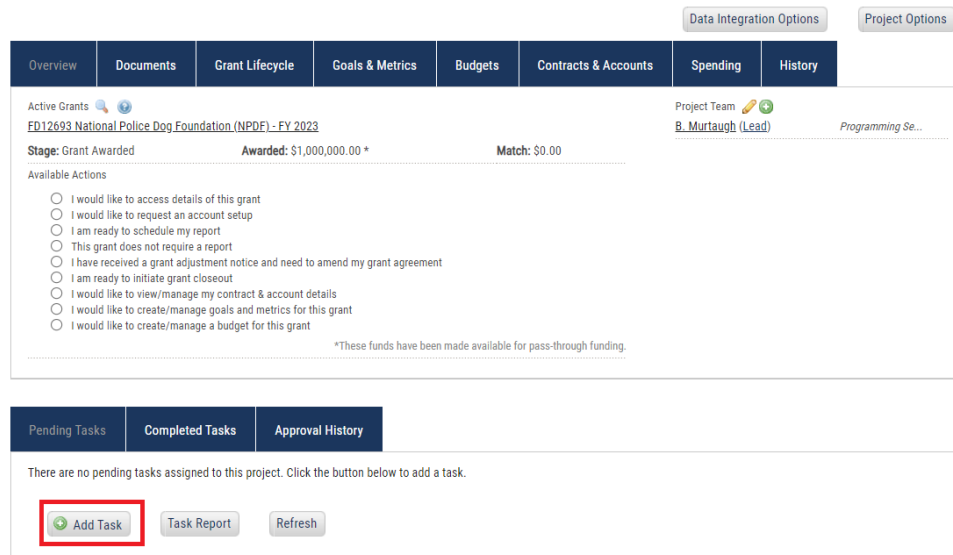
Setting Up Advanced Task

1. Login to eCivis
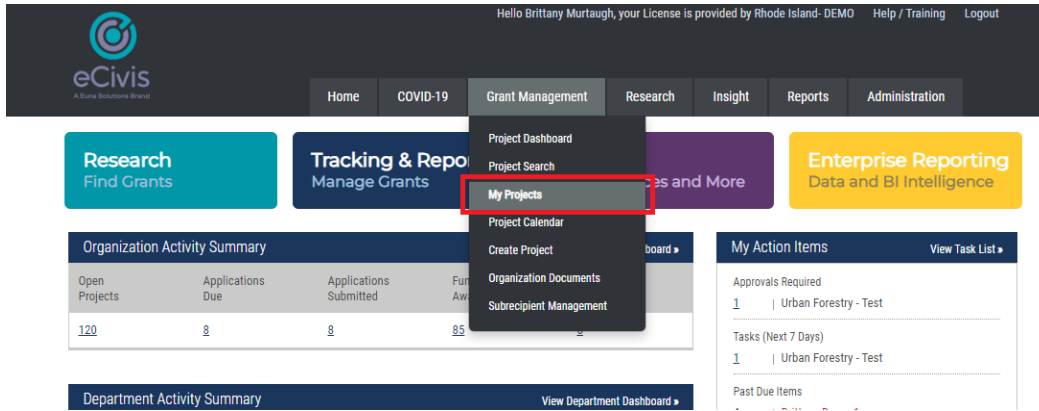
2. Hover over the "Grants Management" tab and select "My Projects"
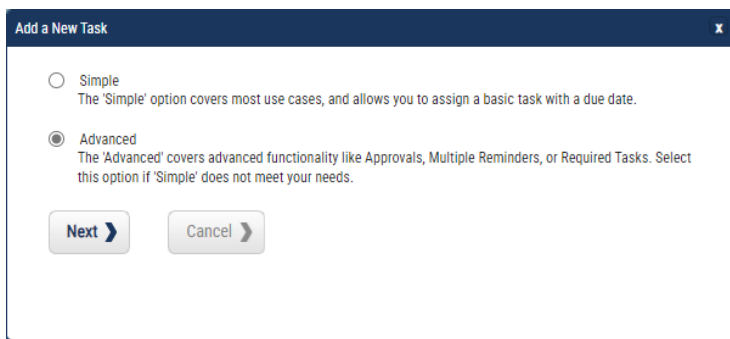

3. Select the project you would like the create a task for

4. Click on the "Add Task" button at the bottom of the screen

5. Select "Advanced Task"
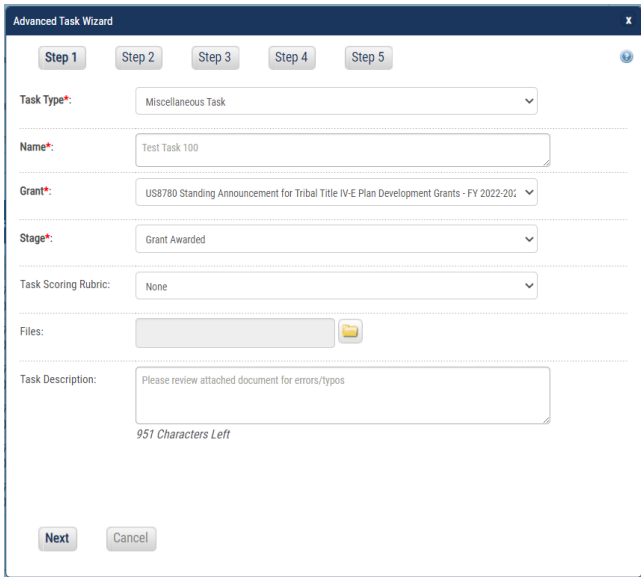
6. Step 1: Fill out relevant information pertaining to your task

7. Step 2: Select your approval workflow and (optional) "required" blocking (explanation below)
    a. Standard: requires an approval by an assigned approver or approval group. In a group, any member can approve
    b. Sequential: requires each approval group member to approve the task in a specified order, one after another.
    c. Required Blocking: Prevents the grant from moving forward to a new stage until the task is complete.
        i. For example, if required blocking is selected, the grant cannot be moved from award pending to grant awarded stage in eCivis until the task is completed/marked *Done*.

8. Step 3: Assign Task and User Group
    a. Assign to: Who do you want completing this task
    b. Approver: Who do you want approving this task
        i. User: a single user
        ii. User Group: a group you previously created in eCivis. This may be your grant project team, finance/budget staff, or other individuals working on this project.

9. Step 4: Set task due date and reminder
   a. Due date for the task is required, and reminder date/s are optional. The person who is assigned to the task will receive the reminders via email.

10. Step 5: Recurring task
    a. If you want this task to repeat on a scheduled basis, select "Task repeats". You can then set up the frequency of your task depending on your needs. If you do not want your task to repeat, select "Task does not repeat".

11. Click Save
    a. If you are happy with your task set up, click save to complete your task. If you need to make changes, you can go back to any of the previous steps and make edits as needed.

➢ TIP: Now that your task has been created, it will be active in eCivis and you can view in your Project Dashboard. Reminder, previously created tasks that have not been completed will also be viewable in this area.

➢ TIP: The task will need to be completed by the person assigned to complete the task before it is sent the designated approvers
➢ TIP: Approvers will get an email notification when the user who the task was assigned to completes the task

Example of Advanced Task Set Ups

Request Approval Before Submitting Application

Before submitting an application, you may want other members of your team to review your application. You can upload a PDF, screenshots, or other application materials to a task for them to review. If you set up the task with sequential reviewers, multiple people can have approval authority. Mark yourself as the "Assigned to" and select the user group who you would want to review your application. Alternatively, you can assign the task to the individual completing the application if you need to be the final approver.

Upload Financial Documents (Recurring Task)

If your federal awarding agency requires reports to be completed, or there are other recurring internal reports or tasks you need to complete on a quarterly/recurring basis, it may be helpful to set up a recurring task for yourself and/or others on your team to upload copies to eCivis for recordkeeping. Below is an example of a recurring task that demonstrates personal reminders for uploading backup documentation for federal drawdowns, with an approver (potentially finance staff).

Advanced Task Wizard (Step 3)

| Step 1 | Step 2 | **Step 3** | Step 4 | Step 5 |

Assigned To*:

Brittany Murtaugh ▾

Designated for Approval*:

⦿ User

Choose a user that will be designated as approver

Department of Administration ▾

Katje Benoit ▾

○ User Group

Choose a user group that will be designated for approval. The group is based off Approval Type in previous step.

Select User Group ▾

[Previous] [Next] [Cancel]

Advanced Task Wizard (Step 4)

| Step 1 | Step 2 | Step 3 | **Step 4** | Step 5 |

Due*: 10/31/2023 📅

Reminder: ➕ 10/24/2023 📅

[Previous] [Next] [Cancel]

Advanced Task Wizard (Step 5)

| Step 1 | Step 2 | Step 3 | Step 4 | **Step 5** |

Task Recurrence

○ Task does not repeat

⦿ Task repeats

Frequency*: Monthly ▾

Interval*: Every month ▾

On*:
  ○ A day of the month
    Select Day ▾
  ⦿ The last day of the month

Starting*: 10/31/2023

Create*: One week before due date ▾
  ☑ Create with a reminder

Until: 10/31/2025 📅

[Previous] [Save] [Cancel]

IAA-FF Billing via Scheduled Report Set Up

Within the Select Report Type area of the Report Submitted form, you will have the option of indicating whether or not the report includes spending information. If so, clicking "yes" will allow you to enter the start and end dates of the spending period, the amount spent, and the amount of reimbursement requested, if applicable. You will also have the option of designating the report as the Final Report. Any report marked as a Spending Report, along with all of the information related to that report, may be accessed through the Spending Report link on the Project Dashboard.

Advanced Task Wizard — Step 1

Field	Value
Task Type*:	Scheduled Report
Name*:	Advanced Scheduled Report Task
Grant*:	US8780 Standing Announcement for Tribal Title IV-E Plan Development Grants - FY 2022-202
Task Scoring Rubric:	None
Files:	
Task Description:	Reporting spending for IAA-FF

971 Characters Left

Next   Cancel

Advanced Task Wizard — Step 2

Task Options

☑ Required

The 'required' flag blocks the grant from moving to the next stage if the task has not been completed.

Previous   Next   Cancel

Advanced Task Wizard — Step 3

Assigned To*:

Test Group - BMW

Advanced Task Wizard — Step 4

Field	Value
Due*:	10/31/2023
Reminder: ➕	10/24/2023

Advanced Task Wizard — Step 5

Task Recurrence

○ Task does not repeat

◉ Task repeats

Field	Value
Frequency*:	Monthly
Interval*:	Every 3 months
On*:	○ A day of the month
	Select Day
	◉ The last day of the month
Starting*:	10/31/2023
Create*:	Two weeks before due date
	☐ Create with a reminder
Until:	10/31/2024

Previous   Save   Cancel

How to Complete Tasks Assigned to You

1. When a task is assigned to a user, they will receive an email from eCivis with the details of that task. You can view the task in eCivis by following the hyperlink in the email. Additionally, your assigned tasks can be found by navigating to "My Action Items" - "View Task List" on the eCivis homepage. All tasks can be found at the bottom of the "Project Dashboard" for the project the task is assigned to.
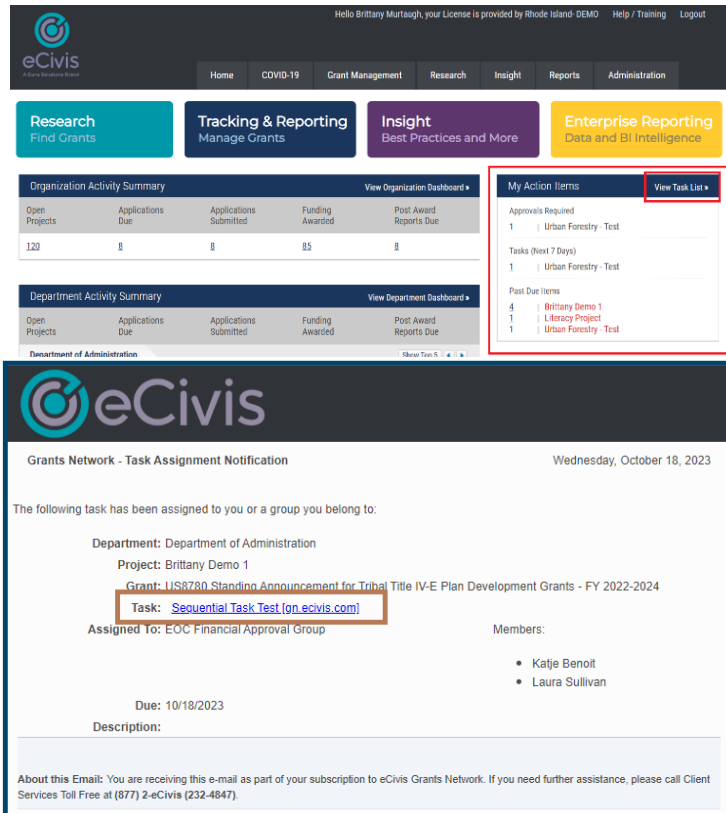
2. Clicking on the hyperlink in the email, or the by clicking "View Task List" and navigating to the appropriate Project Dashboard, you can see all pending tasks, when they are due, and who they are assigned to. To complete the task, click the box under "Done", which will be available if the task is assigned to you.
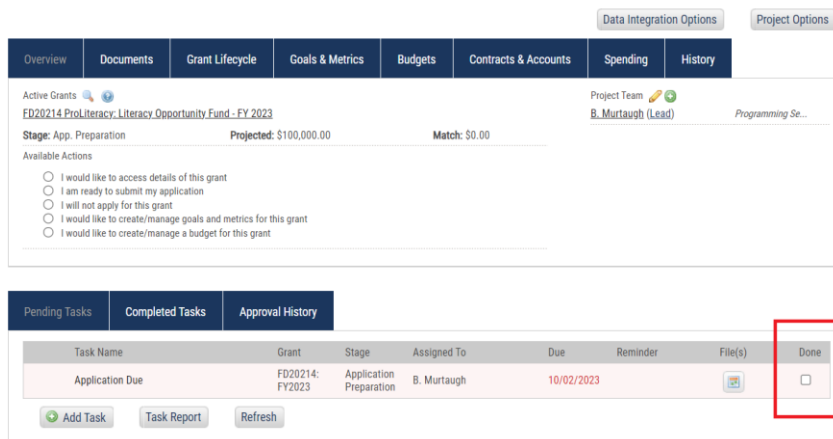
3. Follow the steps to complete the task and click Save. Steps may vary depending on the type of task that is created. See example below for a Miscellaneous Task and Scheduled Report Task.

Miscellaneous Task Example

Approval Request Form

Approval Request Form

Project:	Brittany Demo 1
Grant:	US8780 Standing Announcement for Tribal Title IV-E Plan Development Grants - FY 2022-2024
Task:	Rqst Approval: Test Task 100
Attachments ❔:	📁
Description:	Please review attached document for errors/typos
Approver:	Test Group - BMW
Approval Due *:	10/31/2023
Reminder: ➕	
Files to Forward ❔:	No files are currently attached.
Notes to Approver:	
	1000 Characters Left

Save ❯   **Cancel ❯**

Scheduled Report Task Example

Grant Status - Report Submitted

Brittany Demo 1

Complete Status Form

Grant:	US8780 Standing Announcement for Tribal Title IV-E Plan Development Grants - FY 2022-2024
Report Name *:	Test Schedule
Submitted On *:	10/31/2023
Submitted By *:	Brittany Murtaugh
💬 Notes:	
	1000 Characters Left

Select Report Type ●

Is this a Spending Report? *	○ Yes	○ No
💬 Is this a Reimbursement Request? *	○ Yes	◉ No
Is this the Final Report? *	○ Yes	◉ No

Upload Files

💬 Attach Files:	📁

Save ❯   **Cancel ❯**

4. Completed tasks can always be viewed for reference. At the bottom of your Project Dashboard, select the "Completed Tasks" tab. A page with all submitted tasks will now open, including the attached files, notes, and additional information.

Completed Tasks
Brittany Demo 1

US8780 Standing Announcement for Tribal Title IV-E Plan Development Grants - FY 2022-2024   ▬ Minimize

Stage	Task Name	Due	Completed On	Completed By	Download Files	Manage Files	Edit Task	Scoring Rubric	Notes
Grant Awarded	Sequential Task Test	10/18/2023	10/18/2023	K. Benoit	📁	🖊	🖊	📄
Grant Awarded	Test Task - BWM	10/18/2023	10/18/2023	K. Benoit Dept	📁	🖊	🖊	📄
Grant Awarded	Rqst Approval: Test 101	10/18/2023	10/18/2023	B. Murtaugh	📁		🖊	📄
Grant Awarded	Approval Reqd: Test 101	10/18/2023	10/18/2023	K. Benoit	📁		🖊	📄
Grant Awarded	-Approved	10/18/2023	10/18/2023	K. Benoit				
Grant Awarded	Test Task 100	10/24/2023	10/24/2023	L. Sullivan	📁	🖊	🖊	📄

Done ❯

5. Once the task is completed, if there is an individual or user group that was selected as the approver, the task will then move on to them for approval.

How to Complete Tasks as a Reviewer

1. When a user is requested to review a task, they will receive an email from eCivis with the details of that task. You can view the task in eCivis by following the hyperlink in the email. Additionally, tasks for your approval can be found by navigating to "My Action Items" - "View Task List" on the eCivis homepage. All tasks can be found at the bottom of the "Project Dashboard" for the project the task is assigned to.
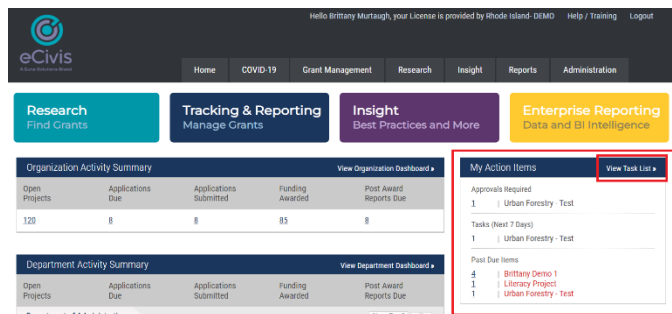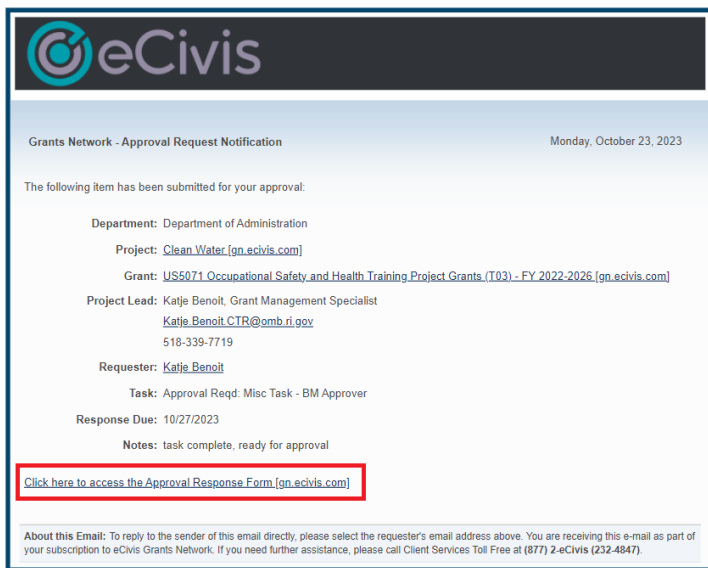
2. By following the link in the email received, you will be taken directly to the "Approval Response Form". Approvers can review any information or uploads the task assignee has included, and then choose to approve, deny, or request additional information for the task.

3. Once a selection has been made, the assignee of the task will be notified via email. If the task was sent back for additional information, the assignee will need to complete those updates and follow the same process to re-submit for approval. The task will then move to the "Completed Tasks" section of the Project Dashboard"