

# 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

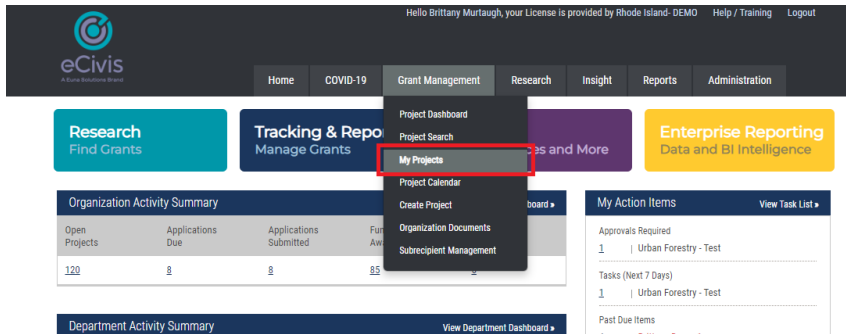
Advanced Task: Includes functionality from simple task as well standard or sequential task approvals, option to block grant progress if task has not been completed, and task repetition option. You may want to upgrade to an advanced task if you

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

### Project Dashboard: Test

Department: Department of Administration

Active Grants

FD12693 National Police Dog Foundation (NPDF) - FY 2023

Project Team: B. Murtaugh (Lead) Programming Se...

Stage: Grant Awarded      Awarded: \$1,000,000.00 \*      Match: \$0.00

Available Actions

- I would like to access details of this grant
- I would like to request an account setup
- I am ready to schedule my report
- This grant does not require a report
- I have received a grant adjustment notice and need to amend my grant agreement
- I am ready to initiate grant closeout
- I would like to view/manage my contract & account details
- I would like to create/manage goals and metrics for this grant
- I would like to create/manage a budget for this grant

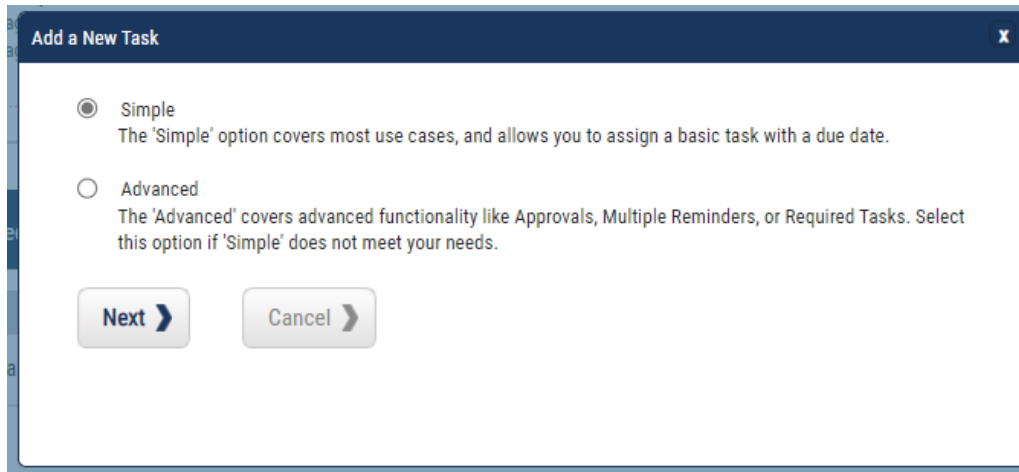
\*These funds have been made available for pass-through funding.

Pending Tasks    Completed Tasks    Approval History

There are no pending tasks assigned to this project. Click the button below to add a task.

Add Task    Task Report    Refresh

5. Select "Simple Task" and select next



6. Select your task type

- Miscellaneous tasks: Simple Yes or No tasks – typically used to mark something “complete”
- 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

- 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

Project Dashboard: Brittany Demo 1  
Department: Department of Administration

Data Integration Options | Project Options

Overview | Documents | Grant Lifecycle | Goals & Metrics | Budgets | Contracts & Accounts | Spending | History

Active Grants

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

Stage: Implementation | Awarded: \$4,958,618.00 \* | Match: \$0.00

Project Team: B. Murtaugh (Lead) | Programming Ge...  
K. Benoit | Grant Manage...  
L. Sullivan | IFM

Pending Required Tasks: 3 | ITEMS REQUIRED TO PROGRESS TO NEXT STAGE

Available Actions

- I would like to access details of this grant
- I would like to request an account setup
- I want to update my scheduled reports
- I have received a grant adjustment notice and need to amend my grant agreement
- I am ready to initiate grant closeout
- I would like to view/manage my contract & account details
- I would like to create/manage goals and metrics for this grant
- I would like to create/manage a budget for this grant

\*These funds have been made available for pass through funding.

Designated for Approvals

User Groups  
KB Group

Pending Tasks | Completed Tasks | Approval History

Task Name	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
Rqst Approval: Test Task 123	US8780: FY2024	Grant Awarded	B. Murtaugh	09/29/2023	09/22/2023		<input type="checkbox"/>
Test Task 123	US8780: FY2024	Grant Awarded	B. Murtaugh	09/29/2023	09/22/2023		<input type="checkbox"/>
Rqst Approval: Test Task 123	US8780: FY2024	Grant Awarded	B. Murtaugh	10/06/2023			<input type="checkbox"/>
Rqst Approval: Test Task 123	US8780: FY2024	Grant Awarded	B. Murtaugh	10/13/2023			<input type="checkbox"/>
Test Task 100	US8780: FY2024	Grant Awarded	EGC Financial Approval Gr...	10/24/2023			<input type="checkbox"/>
Budget Check	US8780: FY2024	Grant Awarded	B. Murtaugh	10/31/2023	10/24/2023		<input type="checkbox"/>

Add Task | Task Report | Refresh

- 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.

Simple Task Wizard

Task Type\*:

Name\*:

Grant\*:

Stage\*:

Task Scoring Rubric:

Assigned To\*:

Due\*:

Reminder:

Files:

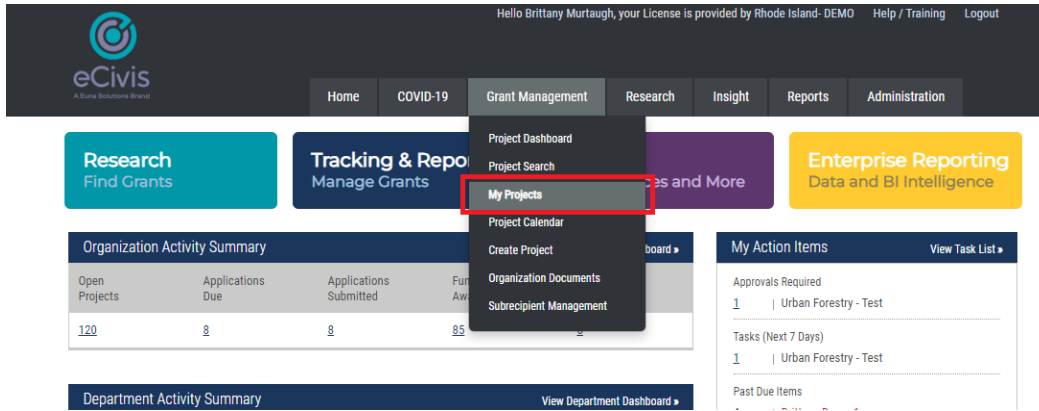
Task Description:

945 Characters Left

Save Cancel

# Setting Up Advanced Task

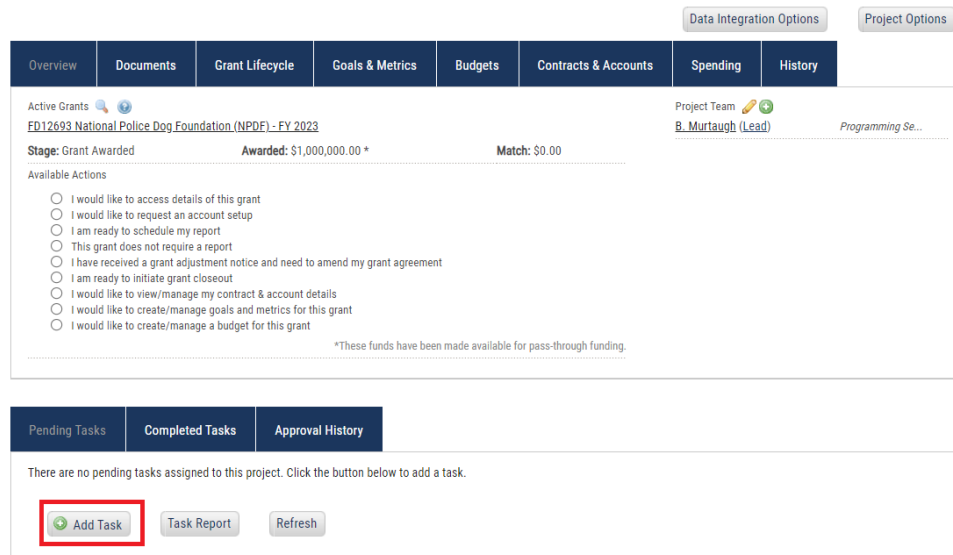
1. Login to eCivis
2. Hover over the “Grants Management” tab and select “My Projects”



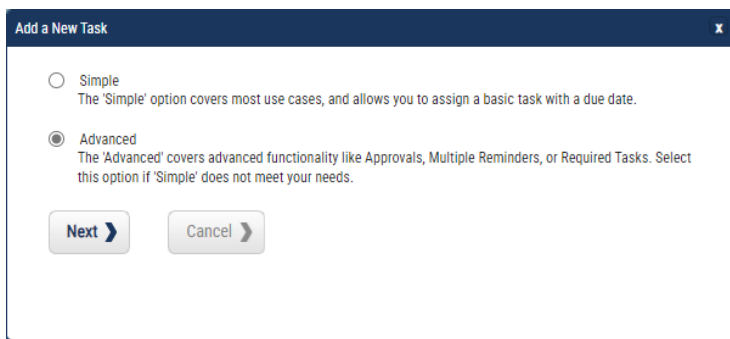
3. Select the project you would like to create a task for
4. Click on the “Add Task” button at the bottom of the screen

## Project Dashboard: Test

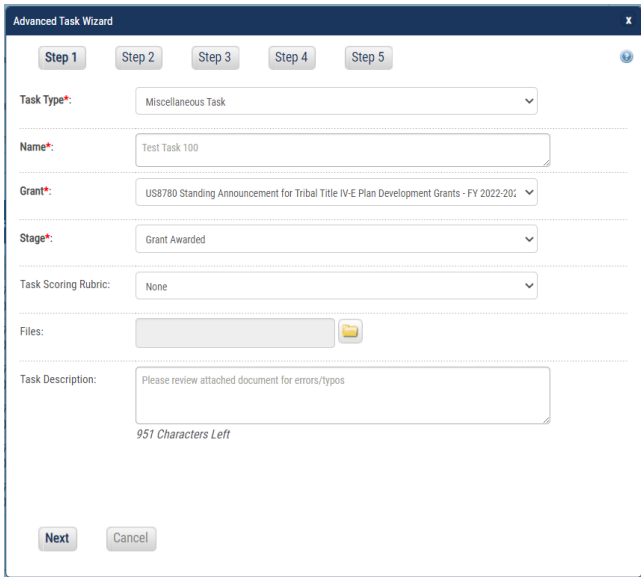
Department: Department of Administration



5. Select “Advanced Task”



## 6. Step 1: Fill out relevant information pertaining to your task



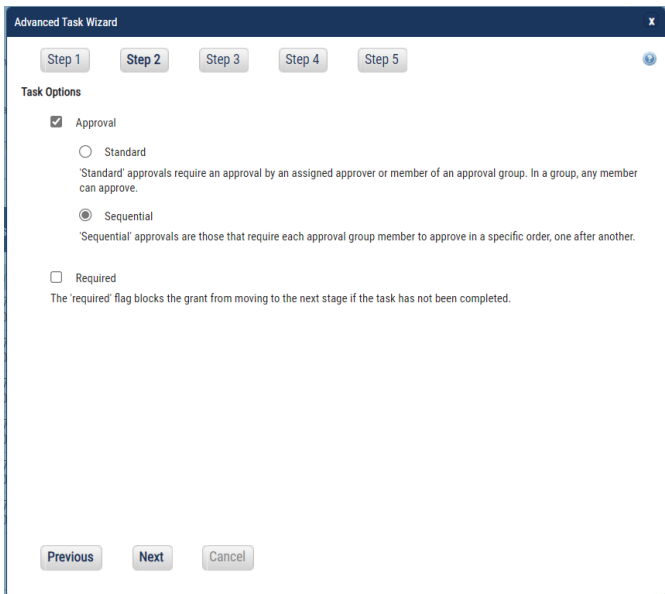
The screenshot shows the 'Advanced Task Wizard' window at Step 1. The form includes the following fields:

- Task Type\*:** A dropdown menu with 'Miscellaneous Task' selected.
- Name\*:** A text input field containing 'Test Task 100'.
- Grant\*:** A dropdown menu with 'US\$780 Standing Announcement for Tribal Title IV-E Plan Development Grants - FY 2022-2030' selected.
- Stage\*:** A dropdown menu with 'Grant Awarded' selected.
- Task Scoring Rubric:** A dropdown menu with 'None' selected.
- Files:** A file upload area with a folder icon.
- Task Description:** A text area containing 'Please review attached document for errors/types' and a character count of '951 Characters Left'.

At the bottom of the form are 'Next' and 'Cancel' buttons.

## 7. Step 2: Select your approval workflow and (optional) “required” blocking (explanation below)

- Standard:** requires an approval by an assigned approver or approval group. In a group, any member can approve
- Sequential:** requires each approval group member to approve the task in a specified order, one after another.
- Required Blocking:** Prevents the grant from moving forward to a new stage until the task is complete.
  - 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/*Done*.



The screenshot shows the 'Advanced Task Wizard' window at Step 2, titled 'Task Options'. The form includes the following options:

- Approval:** A checked checkbox. Below it are two radio button options:
  - Standard:** Unselected. Description: 'Standard' approvals require an approval by an assigned approver or member of an approval group. In a group, any member can approve.
  - Sequential:** Selected. Description: 'Sequential' approvals are those that require each approval group member to approve in a specific order, one after another.
- Required:** An unchecked checkbox. Description: The 'required' flag blocks the grant from moving to the next stage if the task has not been completed.

At the bottom of the form are 'Previous', 'Next', and 'Cancel' buttons.

## 8. Step 3: Assign Task and User Group

- Assign to:** Who do you want completing this task
- Approver:** Who do you want approving this task
  - User:** a single user
  - 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.

Advanced Task Wizard

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

Select Department  
Select User

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

Test Group - BMW

Previous Next Cancel

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.

Advanced Task Wizard

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

Due\*: 10/31/2023

Reminder: 10/24/2023

Previous Next Cancel

## 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”.

The image shows two side-by-side screenshots of the 'Advanced Task Wizard' interface, specifically the 'Task Recurrence' section. The left screenshot shows the 'Task does not repeat' option selected. The right screenshot shows the 'Task repeats' option selected, with the following settings: Frequency: Monthly, Interval: Every month, On: A day of the month (15), Starting: 10/31/2023, Create: One week before due date, and a checked box for 'Create with a reminder'. The 'Until' date is set to 10/31/2025. Both screenshots have 'Previous', 'Save', and 'Cancel' buttons at the bottom.

## 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.

The screenshot shows the 'Project Dashboard: Brittany Demo 1' for the Department of Administration. It features a navigation bar with tabs for Overview, Documents, Grant Lifecycle, Goals & Metrics, Budgets, Contracts & Accounts, Spending, and History. The main content area displays project details for 'US8780 Standing Announcement for Tribal Title IV-E Plan Development Grants - FY 2022-2024'. Below this, there are sections for 'Pending Required Tasks' and 'Available Actions'. At the bottom, a table lists tasks with columns for Task Name, Grant, Stage, Assigned To, Due, Reminder, File(s), and Done. The task 'Rqst Approval: Test Task 100' is highlighted with a red box.

Task Name	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
Rqst Approval: Test Task 123	US8780: FY2024	Grant Awarded	B. Murtaugh	09/29/2023	09/22/2023	[Icon]	<input type="checkbox"/>
Test Task 123	US8780: FY2024	Grant Awarded	B. Murtaugh	09/29/2023	09/22/2023	[Icon]	<input type="checkbox"/>
Rqst Approval: Test Task 123	US8780: FY2024	Grant Awarded	B. Murtaugh	10/06/2023		[Icon]	<input type="checkbox"/>
Rqst Approval: Test Task 123	US8780: FY2024	Grant Awarded	B. Murtaugh	10/13/2023		[Icon]	<input type="checkbox"/>
Test Task 100	US8780: FY2024	Grant Awarded	EOC Financial Approval Gr...	10/24/2023		[Icon]	<input type="checkbox"/>
Budget Check	US8780: FY2024	Grant Awarded	B. Murtaugh	10/31/2023	10/24/2023	[Icon]	<input type="checkbox"/>
Rqst Approval: Test Task 100	US8780: FY2024	Grant Awarded	B. Murtaugh	10/31/2023	10/24/2023	[Icon]	<input type="checkbox"/>

- 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.

The image displays two screenshots of the 'Advanced Task Wizard' interface. The left screenshot is on Step 1, showing fields for 'Task Type' (Miscellaneous Task), 'Name' (Review Application Materials), 'Grant' (US0483 Emergency Community Water Assistance Grants (ECWAG) - FY 2023), 'Stage' (Application Preparation), 'Task Scoring Rubric' (None), 'Files' (Test document.docx (11.7 Kb)), and 'Task Description' (Hello, Please review attached application materials before we submit. 930 Characters Left). The right screenshot is on Step 3, showing 'Assigned To' (Brittany Murtaugh), 'Designated for Approval' options (User or User Group), and a dropdown for 'User Group' (GMO - Test Group).

## 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).

The image displays two screenshots of the 'Advanced Task Wizard' interface. The left screenshot is on Step 1, showing fields for 'Task Type' (Miscellaneous Task), 'Name' (Upload Backup Federal Drawdown Documents), 'Grant' (US8780 Standing Announcement for Tribal Title IV-E Plan Development Grants - FY 2022-20), 'Stage' (Grant Awarded), 'Task Scoring Rubric' (None), 'Files' (Test document.docx (11.7 Kb)), and 'Task Description' (Federal drawdown documents (period January - June 2023) 945 Characters Left). The right screenshot is on Step 3, showing 'Task Options' with 'Approval' checked (Standard selected) and 'Required' unchecked.

Advanced Task Wizard

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  
Katie 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 1 Step 2 Step 3 Step 4 Step 5

**Due\*:** 10/31/2023

**Reminder:** 10/24/2023

Previous Next Cancel

Advanced Task Wizard

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

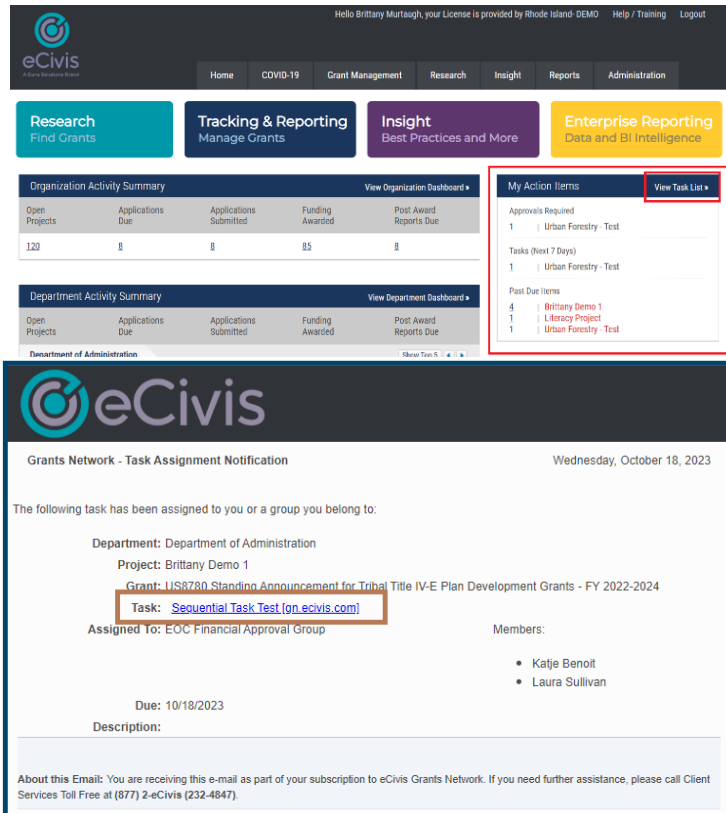
Within the Select Report Type area of the Report Submitted form, you will have the option of indicating whether or not the report includes spending information. If so, clicking “yes” will allow you to enter the start and end dates of the spending period, the amount spent, and the amount of reimbursement 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.

The screenshots illustrate the 'Advanced Task Wizard' interface across five steps:

- Step 1:** Task Type: Scheduled Report; Name: Advanced Scheduled Report Task; Grant: US8780 Standing Announcement for Tribal Title IVE Plan Development Grants - FY 2022-20; Task Scoring Rubric: None; Task Description: Reporting spending for IAA-FF (971 Characters Left).
- Step 2:** Task Options:  Required. The 'required' flag blocks the grant from moving to the next stage if the task has not been completed.
- Step 3:** Assigned To: Test Group - BMW.
- Step 4:** Due: 10/31/2023; Reminder: 10/24/2023.
- Step 5:** Task Recurrence:  Task repeats. Frequency: Monthly; Interval: Every 3 months; On:  The last day of the month; Starting: 10/31/2023; Create: Two weeks before due date;  Create with a reminder; Until: 10/31/2024.

# How to Complete Tasks Assigned to You

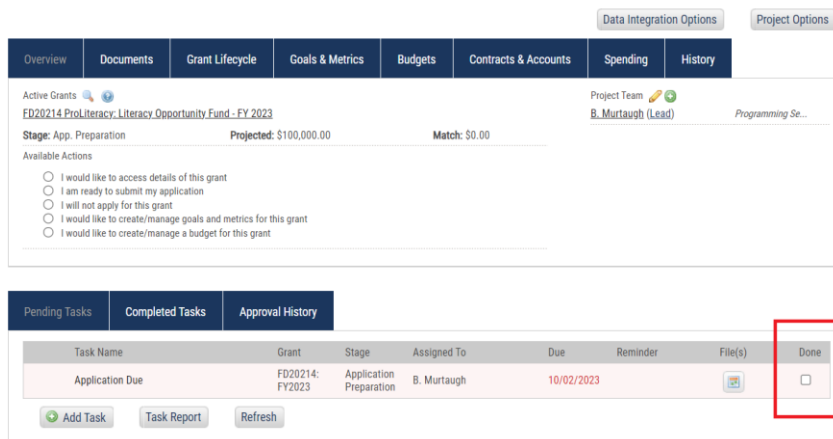
1. When a task is assigned to a user, they will receive an email from eCivis with the details of that task. You can view the task in eCivis by following the hyperlink in the email. Additionally, your assigned tasks can be found by navigating to “My Action Items” - “View Task List” on the eCivis homepage. 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.

## Project Dashboard: Literacy Project

Department: Department of Administration



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**

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\*:

Reminder:

Files to Forward: No files are currently attached.

Notes to Approver:

1000 Characters Left

## 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\*:

Submitted By\*:

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:

- 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

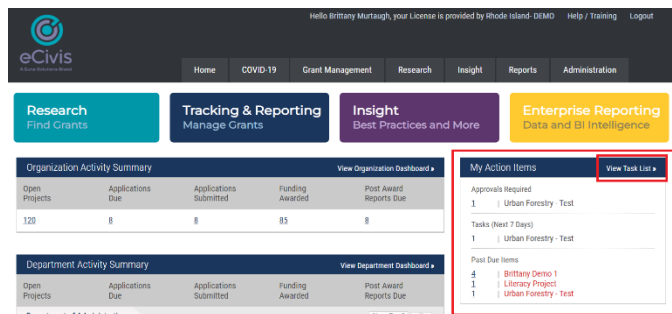
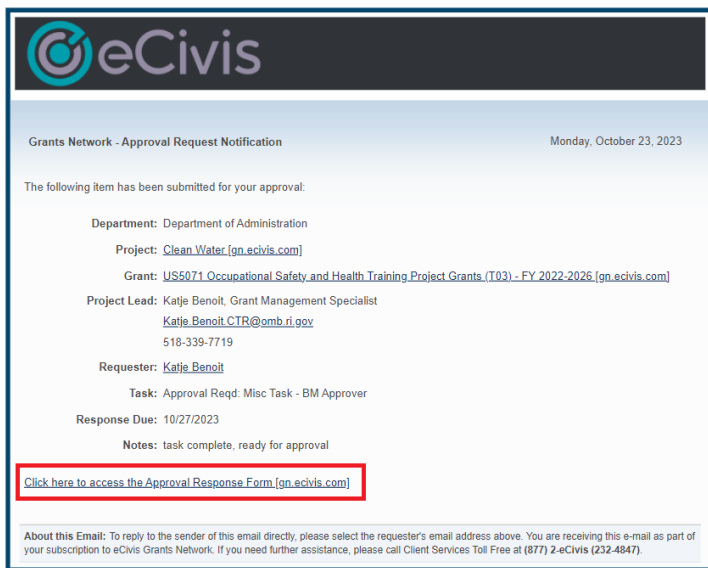
US8780 Standing Announcement for Tribal Title IV-E Plan Development Grants - FY 2022-2024 Minimize

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					

- 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.

## Approval Response Form

Approval Response Form

Project:

Grant:

Task:

Project Lead:

Attachments:

Project Documents:

Notes from Requester:

Request Approved?:  Yes  No  Request Additional Information

Notes:   
971 Characters Left

- 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



Grants Network - Approval Response Notification Monday, October 23, 2023

The following item has been submitted in response to a request for approval:


Department: Department of Administration  
 Project: [Clean Water \[gn.ecivis.com\]](#)  
 Grant: [US5071 Occupational Safety and Health Training Project Grants \(T03\) - FY 2022-2026 \[gn.ecivis.com\]](#)

Project Lead: Katje Benoit, Grant Management Specialist  
[Katje.Benoit.CTR@omb.ri.gov](mailto:Katje.Benoit.CTR@omb.ri.gov)  
 518-339-7719

Approver: [Brittany Murtaugh](#)  
 Task: Approval Reqd: Misc Task - BM Approver

Approval Response: Approved  
 Notes: Approved by BWM - 10/23/2023



About this Email: To reply to the sender of this email directly, please select the approver's email address above. You are receiving this e-mail as part of your subscription to eCivis Grants Network. If you need further assistance, please call Client Services Toll Free at (877) 2-eCivis (232-4847).

Home / Project Calendar / Project Dashboard 

### Project Dashboard: Clean Water



Department: Department of Administration

Data Integration Options Project Options

Overview	Documents	Grant Lifecycle	Goals & Metrics	Budgets	Contracts & Accounts	Spending	History
Active Grants  <b>US1768 National Coastal Wetlands Conservation Grant (NCWCG) Program (Select States) - FY 2023</b> Stage: App. Submitted      Projected: \$50,000.00      Match: \$50,000.00				Project Team  <b>K. Benoit (Lead)</b> Grant Manage... <b>B. Murtaugh</b> Programming Se... <b>S. Smith</b> Programming Se... <b>S. Thompson</b> test			
<b>US5071 Occupational Safety and Health Training Project Grants (T03) - FY 2022-2026</b> Stage: Implementation      Awarded: \$10,000.00 *      Match: \$0.00							

SUPPORT

Pending Tasks Completed Tasks Approval History

Task Name	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
Contract Close	US5071: FY2026	Grant Awarded	K. Benoit	03/31/2024	01/01/2024		

Add Task    Task Detail    Refresh