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Tasks within the RGS enable the project to flow from one stage to the next. This guide is only about tasks, how to filter, action them, and find completed tasks. It is not a guide on how to complete specific tasks as these are described in other user guides.

My Tasks

The type of tasks you receive will depend on the roles you have in RGS or within a project. Certain required actions will generate an email (notifying you of the task) as well as the task.

When you are logged into RGS click on 'My Tasks' on the left hand menu. In the My Tasks list you will see all tasks assigned to you or your group. You do not need to have access to the email to access the task. The list is divided into columns that can be sorted and filtered.

Task Types

There are two types of task that are generated Individual Tasks and Group Tasks. Individual tasks are sent to a person requesting that they complete an action for a project. Group tasks are sent to either the HREC or Research Governance Offices for the staff in those offices to action a submission relating to a project. Other group tasks are related to the administration of RGS and its users. Any Group task will have a group icon  in the first column. The icon is grey before it has been taken and black when it has been taken.

On the left hand side of the task list you will see icons that show the tasks status.

 The task is one day overdue,

 The task is two to three days overdue.

 The task is overdue by three days or more.

Filtering Tasks

To sort on any column click on the column heading and it will sort in ascending order. Clicking it again will sort it in descending order.

To filter your tasks click the filter icon  on the right hand side of the column headings. This will allow you to either; select from a drop down menu or type the filter criteria into the columns (press enter to generate your list).

Action a Task

Individual Task

To action a task click on the task in the Task Type column (the blue text), this will take you to the Task Form which will detail the task you and you can Action it or Cancel.

Action will take you to the form or area in the project workspace where the task has to be completed. It will open a form if you are being asked to sign or authorise the form or it will take you to the tab where the task is to be completed.

Group Task

Group tasks are slightly different to individual tasks as you have to accept the task first before actioning it. If you don't want to accept the task you can click Cancel.

If you have taken a task you can also re-assign the task back to the group. You can do this in the Task Form screen by clicking the 'Re-assign to Group' button.

If you need to take a task from another user you can click on the black group icon and the Edit Task Ownership screen will appear and you can click either the 'Take task' or 'Re-assign to Group' button depending on which is appropriate.

Notes

Each task has a Notes column. The icon  is white when there are no notes and black when a note has been added to the task. If you want to add a note to a task, click on the Notes icon and when you have entered the information click 'Save'.

Archive a Task

The majority of tasks will disappear from your tasks list once they have been actioned and you have completed the task. If however a task remains you can click on the task and in the Task Form screen you can click the 'Archive' button.

Archive tasks do not appear in your task list unless you select that you want to see them. You can select the option of Archived Tasks and it will show you all completed tasks from the last six months.