

Tasks

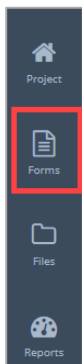
Document Description – The Tasks form tracks work-related project tasks. With the extended date entries, workflow and timeline for each task can be recorded and used in reporting productivity and project timeline.

Batch Uploading Multiple Tasks

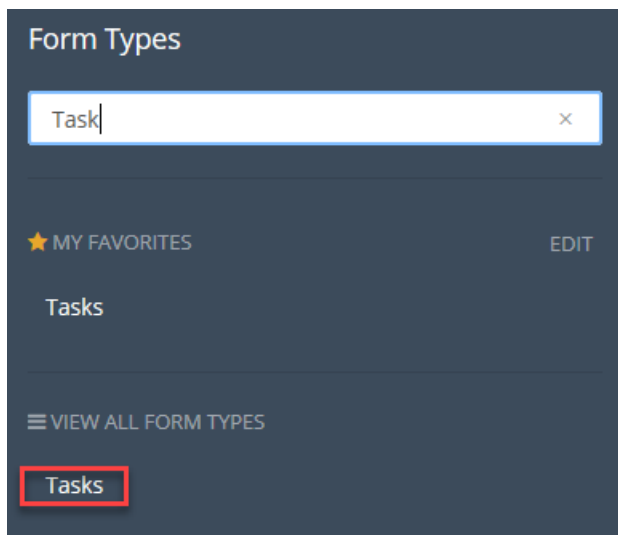
1. Refer to the Batch Upload QRG.

Manually Adding Tasks

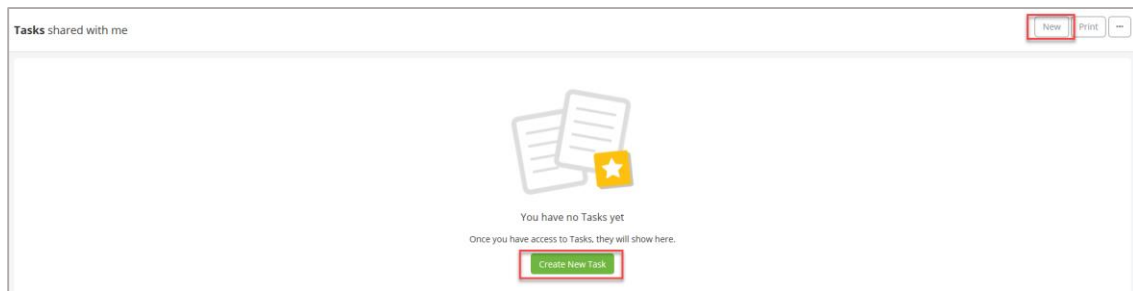
1. Within the project, click the **Forms** icon on the left navigation pane.



2. In the search area of the **Form Types** start to enter Task and then select **Tasks**.



- Click the **Create New Task** button located in the middle of the log or click the **New** button in the upper right corner.



- Enter a **Subject** for the Task.

Task Name * Required

Type the Task Name

- Enter a **Task ID**.

Task ID

- Enter a **Baseline Duration**.

Baseline Duration

- Enter a **Duration**.

Duration

- Enter an **Actual Duration**.

Actual Duration

- Enter the **Baseline Start** date.

Baseline Start

< April 2020 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	01	02
03	04	05	06	07	08	09

10. Enter the **Baseline Finish** date.

Baseline Finish

< April 2020 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	01	02
03	04	05	06	07	08	09

11. Enter the **Early Start** date.

Early Start

< April 2020 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	01	02
03	04	05	06	07	08	09

12. Enter the **Early Finish** date.

Early Finish

< April 2020 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	01	02
03	04	05	06	07	08	09

13. Enter the **Late Start** date.

Late Start

< April 2020 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	01	02
03	04	05	06	07	08	09

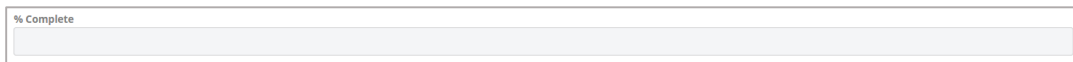
14. Enter the **Late Finish** date.

Late Start

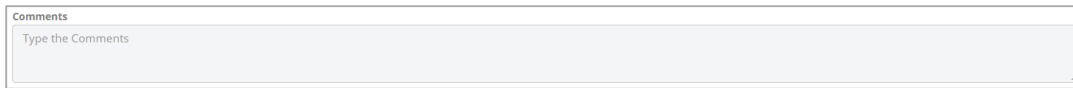
< April 2020 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	01	02
03	04	05	06	07	08	09

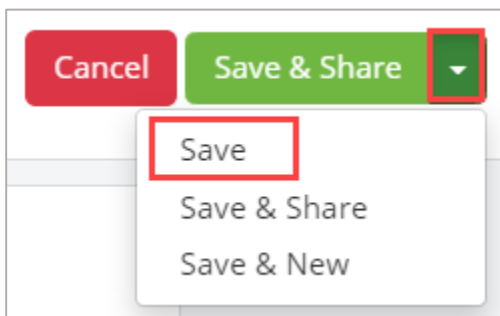
15. Enter the % **Complete**.

A screenshot of a text input field with the placeholder text "% Complete". The field is empty and has a light gray border.

16. Enter any applicable **Comments**.

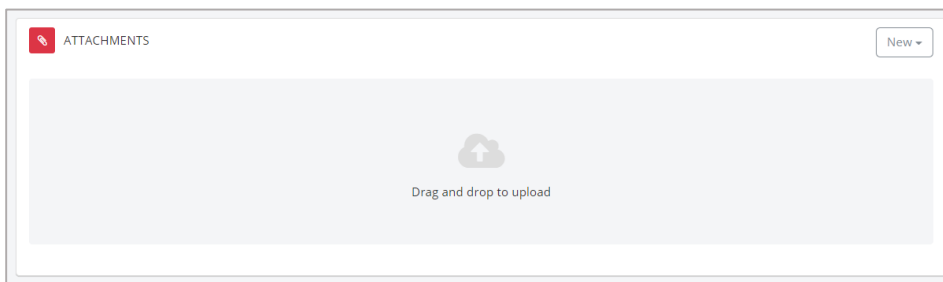
A screenshot of a text input field with the placeholder text "Comments" and "Type the Comments". The field is empty and has a light gray border.

17. To complete and save the **Task** document, click the dropdown arrow beside **Save & Share** and click the **Save** button.



Attach Supporting Documentation

1. Drag and drop any supporting files to the **Attachments** section of the record.



Comments

1. To ask questions or add commentary regarding the Task record, use the **Comments** section.

The screenshot shows a panel titled 'ACTIVITY' with two tabs: 'Comments' and 'Activity'. The 'Comments' tab is selected. Below the tabs is a text input field labeled 'Comment' with a small icon of a pencil and paper to its right. Below the input field is a 'Post' button. At the bottom of the panel, there is a light gray box with the text: 'No comments added to this document yet. Be the first to comment.'

Editing the Task Document

1. Open the Task log and **click the title of the record** you wish to edit.

The screenshot shows a table titled 'Tasks shared with me' with buttons for 'New', 'Print', and a menu icon. The table has columns for 'Task Name', 'Created On', and 'Shared'. The first row is highlighted, and a red arrow points to the task name '11 Month Warranty Walk through'.

Task Name	Created On	Shared
11 Month Warranty Walk through	1/30/20 6:58 PM	35
Award	1/30/20 6:58 PM	35
Award	1/30/20 6:58 PM	35
Award-GC	1/30/20 6:58 PM	35

2. Click the **Edit** button in the Details section.

The screenshot shows a panel titled 'DETAILS' with a pencil icon. It contains the following information: Task Name: Award, Task ID: 700, Baseline Duration: 3, Duration: 3, Actual Duration: 0. An 'Edit' button is located in the top right corner of the panel.

3. After making the necessary edits, click the dropdown arrow beside **Save & Share** and click the **Save** button.

