Chainformation Admin User Guide

(Tasks Manager)

Last Updated: March 30, 2023

Welcome to the **Chainformation** user guide. In this manual, we will learn how to create new tasks and manage your existing tasks.

Chainformation allows you to create private tasks that serve as personal reminders for your daily, weekly tasks, etc. Likewise, you can assign different tasks to your individual colleagues or all colleagues associated with selected roles and units. You can track all the tasks you have assigned to your colleagues under a single tab named as **Status & followup**.

*NOTE to SUPERADMIN: You must first make the proper settings for the **Tasks** module in your system setup to control which **Roles** in your organisation are allowed to assign tasks to other users. See the User Guide for **Roles Administration***
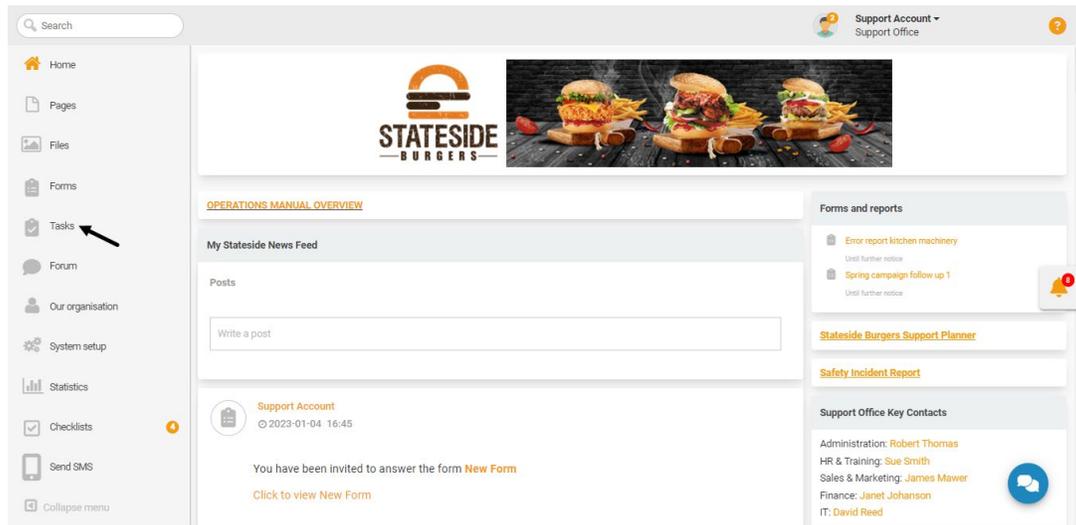
Here is a list of all the features of the **Tasks** module that we will discuss in this manual.

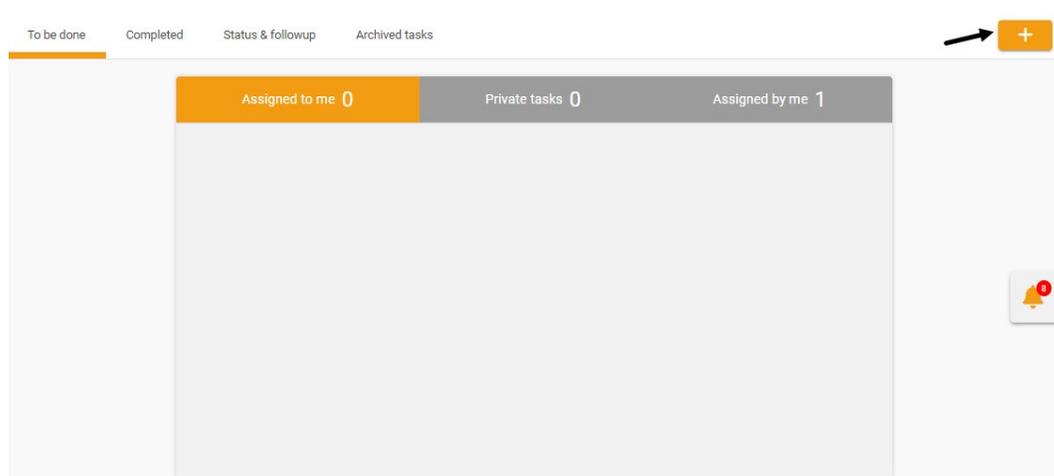https://chainformation.com/userguides

Create a New Task

Once you have logged in to the **Chainformation** platform then follow these navigation steps to **create** a **new task**.

1. Click the **Tasks** button in the left-side menu to open the **Tasks** page.
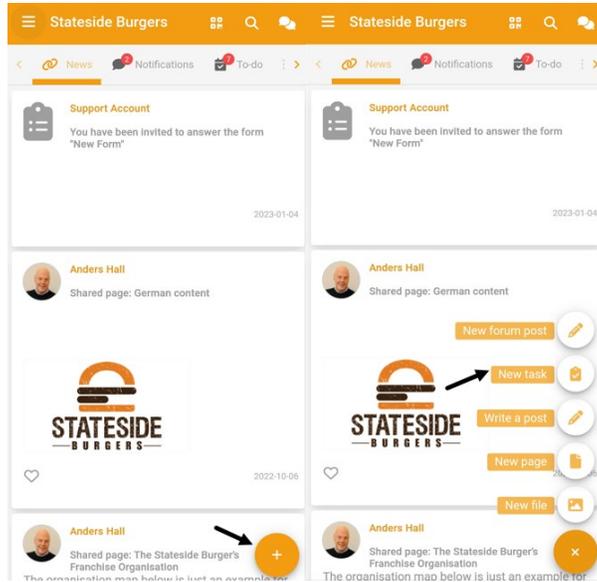

2. Click the **(+)** icon in the top-right corner of the **Tasks** page to add a new task.

This will open the **New task** page.

If you are accessing the platform from the **Chainformation mobile app**, you can access the **New task** page by clicking the respective option from the **FAB** menu on the home screen of your mobile app or **Tasks** page.

On the **New task** page, follow the navigation steps demonstrated below to create a new task for yourself or your selected colleagues.

3. On the **New task** page, write a **header** and **short description** (if applicable) that explain the task requirements.

4. Upload a file (if required) from your device or **Chainformation File Manager** to attach it with the new task. See the User Guide for **Files**

5. Under the **Assignee** heading, choose who you want to assign this task.

6. You can assign the task to yourself by selecting the **Private task** option.

Note: A private task is just like a personal reminder and no other user on the platform will receive a notification for this task or can see it.

7. You can assign the task to your selected colleagues by selecting the **Assign staff members** option.

7(a). Select the colleagues you want to assign this task from the "**Select staff members**" dropdown.

8. You can assign the task to all staff members with the selected roles in the selected units by selecting the **Assign roles and units** option.

8(a). Select the **roles** you want to assign this task from the respective dropdown.

8(b). Select the **units** you want to assign this task from the respective dropdown.

Note: You can also use the **Search** feature to find a colleague, role, and/or unit based on any of the available data/information. See the User Guide for **Search**

Remember, the users, roles and units you can assign a task depends on the level your role has been assigned for the **Tasks** module. See the User Guide for **Roles Administration**

For example, you can assign a task to anyone in the organisation as a super admin. However, if you are a local manager, then you can assign a task only to the people related to your respective Unit.

9. Enter a **deadline** (if required) in the mentioned date format for this task or select it from the calendar form.

10. Now, click the **Save task** button to assign the task to yourself or your selected colleagues.

View and Manage Your Existing Tasks

Once you have opened the **Tasks** page as demonstrated in the previous section, you can review the tasks assigned to you by your colleagues, your private tasks, and tasks you have assigned to your colleagues.

Here's a summary of the information available on different tabs of the **Tasks** dashboard and the actions you can perform for different tasks.
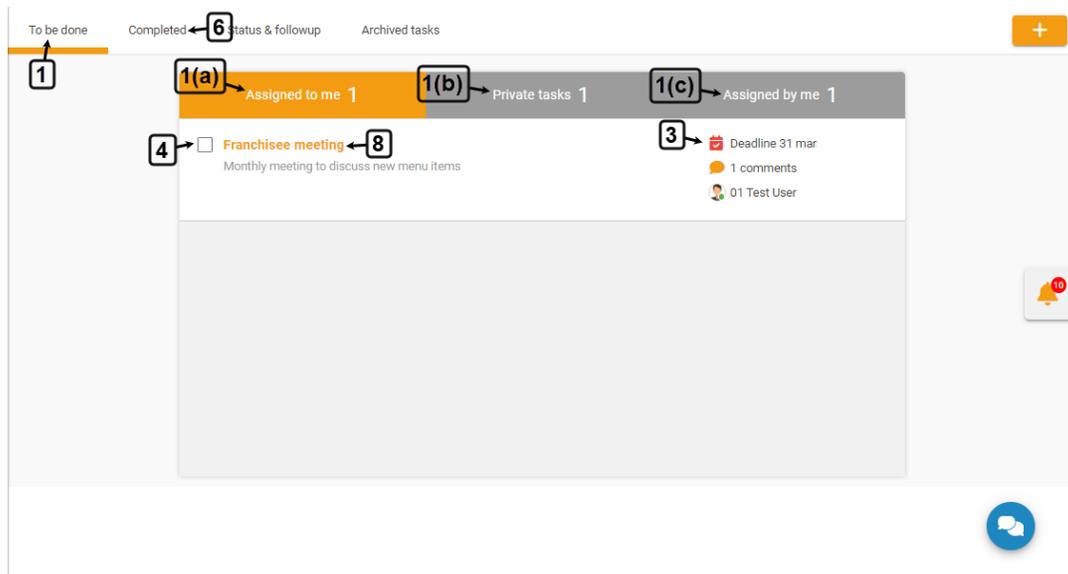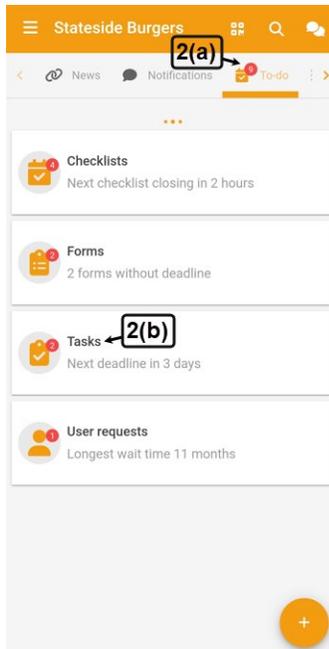

Tasks to be done

1. By default, the system will redirect you to the **To be done** tab on the **Tasks** page where you can view your incomplete tasks under three different categories:

1(a). **Assigned to me** (Tasks assigned to you by your colleagues)

1(b). **Private Tasks** (Tasks you've assigned to yourself)

1(c). **Assigned by me** (Tasks you've assigned to different colleagues, roles and units)

2. You can quickly access the **Tasks to be done** tab from your **to-do** list on the **Chainformation mobile app**.

3. On the **Tasks to be done** tab, you can view the deadline (if any) of each task, number of comments added to it, and the name of the colleague who has created it.

Mark a Task as Completed

4. You can mark an incomplete task as completed by **checking** the **checkbox** next to its header on the **Tasks to be done** tab.

5. You can also mark an incomplete task as completed from your **to-do** list on the **Chainformation website platform**.

Follow the navigation steps demonstrated below to view and complete a task in your **to-do** list.

https://chainformation.com/userguides
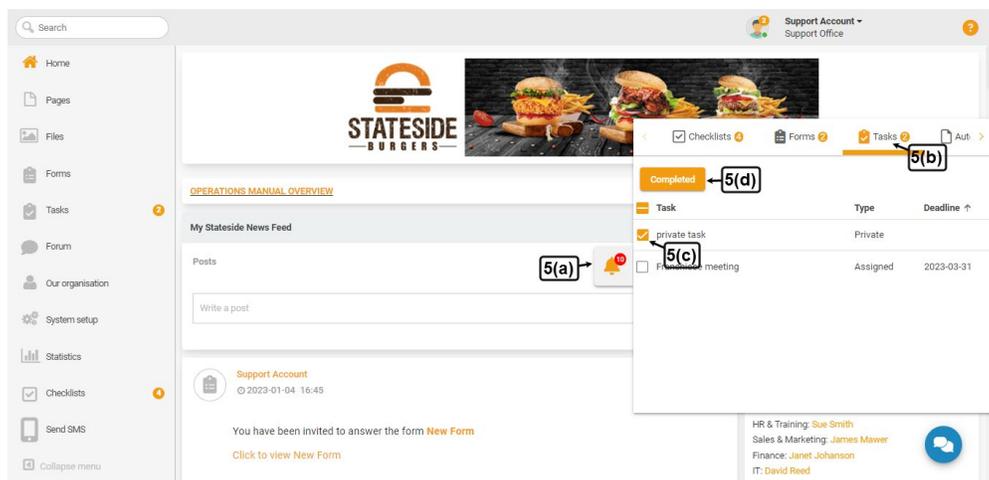
5(a). Click the **Notification** icon on the home page or any other page of the Chainformation website platform.

5(b). Go to the **Tasks** tab of your **to-do** list.

5(c). **Check** the **checkbox** next to task(s) you want to mark as completed.

5(d). Click the **Completed** button to mark the selected tasks as completed.

Note: When a task is assigned to multiple users, they don't have to mark it as completed one by one. Instead, a task will be moved to the **Completed** tab for all assignees when any one of them marks it as completed.

A task owner/creato**r** can also set a task as completed when task assignees have completed it.

Completed tasks

6. You can view your completed tasks on the **Completed** tab on the Tasks page under the same three categories as they are on the **Tasks to be done tab** i.e.

6(a). **Assigned to me**

6(b). **Private Tasks**

6(c). **Assigned by me**

7. You can mark a completed task as incomplete by **unchecking** the **checkbox** next to its header on the **Completed** tab.

When you mark a complete task as incomplete, it will be moved to the **Tasks to be done** tab. Also, it will be shown in the **to-do** list of task assignees again.

View and Edit Task Details

8. You can view details of a task by clicking its header on the **Tasks** page or your **to-do** list.

9. On the **Task details** page, you can view its full description, the date when this task was posted, and list of task assignees.

10. You can view comments added to this task, and add a new comment to it on the **Task details** page.

Commenting on a task is similar to writing a feed post. Just like a post, you can customise your comment on a task using various typographical and attachment options. See the User Guide for **Feed Posts**

11. You can edit a task by clicking the **Edit** button in the top-right corner of the **Task details** page (if applicable).

This will open the **Edit task** page where you can update its header, description, media, assignees, and/or deadline as demonstrated in the previous section. See the User Guide for **Create a New Task**
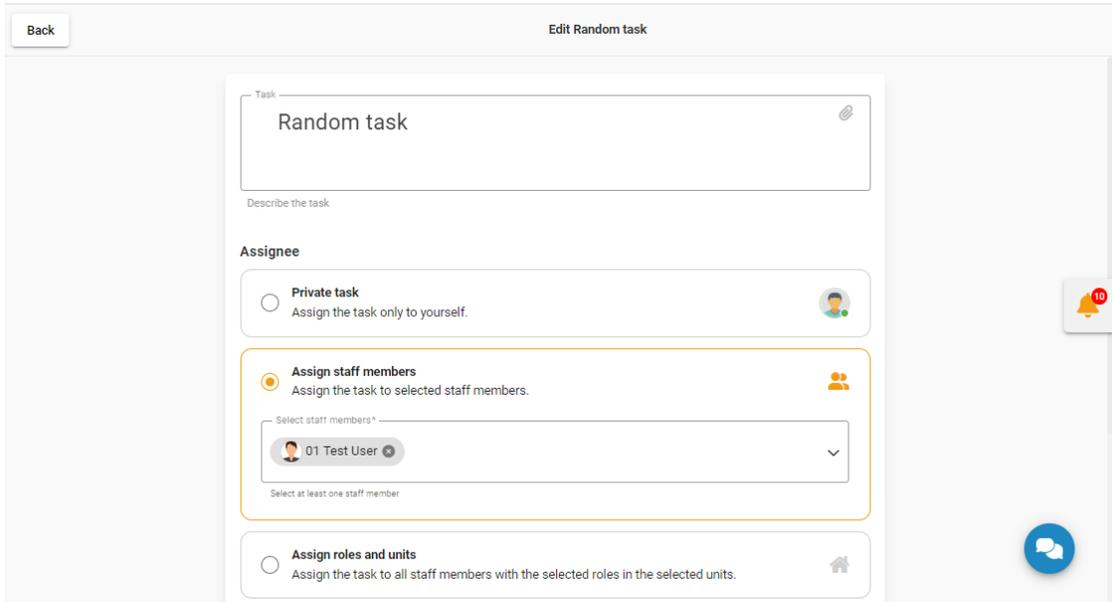
Remember, Chainformation doesn't allow users to edit tasks created by their colleagues. Instead, you can edit only those tasks that are created by you.

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Track Your Tasks in the Status & Followup tab

Follow these navigation steps to view the current status of all the tasks you have assigned to your colleagues in the **Status & followup** tab.

1. Go to the **Status & followup** tab on the **Tasks** page.

Note: You can only track the tasks you have assigned to others on the **Status & Followup** tab. Your private tasks and the tasks assigned to you by others are not shown here.

2. On the **Status & Followup** tab, you can view the number of **In progress**, **Overdue**, and **Completed** tasks under the **Status for tasks you've assigned to colleagues** header.

You can see the detailed status of each task under its respective category on the **Status & Followup** tab.

Tasks in progress

3. Under the **Tasks in progress** header, you can see the **number of assignees**, and **deadline** (if any) of tasks that are currently incomplete.

4. You can see the **time overdue** for the tasks that have passed their deadline and are still incomplete.

5. You can see when the **last reminder** was sent for an incomplete task.

Send reminder for an incomplete task

6. To send a reminder for an incomplete task, **check** the **checkbox** next to its header from the **Tasks in progress** list on the **Status & followup** tab.

7. Click the **With selected** button above the listed tasks.

8. Click the **Send reminders** option from the **With selected** dropdown to send a reminder for the selected task(s).

![CHAINFORMATION - Stick to your concept]

All task assignees will receive a **push notification** in the **mobile app** as well as a **news feed post** with a reminder to complete this task.

9. You can also **set** a task as **completed/uncompleted** from its **with selected** menu on the **Status & followup** tab.

Completed tasks

10. Under the **Completed tasks** header on the **Status & followup** tab, you can see the names of colleagues who have completed the listed tasks under the **Completed by** heading.

11. You can see the **start date**, **completed date**, and **completion time** of each task.

Remember, completed tasks are automatically **archived** 30 days after **completion**. See the User Guide for **Archived Tasks**

However, you can also move a completed or incomplete task to the **Archived tasks** folder manually.

Archive a Task Manually

12. To archive a task manually, open its **With selected** menu.

13. Click the **Archive tasks** option from the **With selected** dropdown to move the task to your archive.

Note: When you archive an incomplete task, it will be removed from the to-do list of assignees and they cannot complete it until you restore it from the **Archived tasks** tab. See the User Guide for **Restore a Task from Your Archive**

Manage Your Archived Tasks

Follow these navigation steps to restore tasks from the **Archived** tab or delete them permanently.
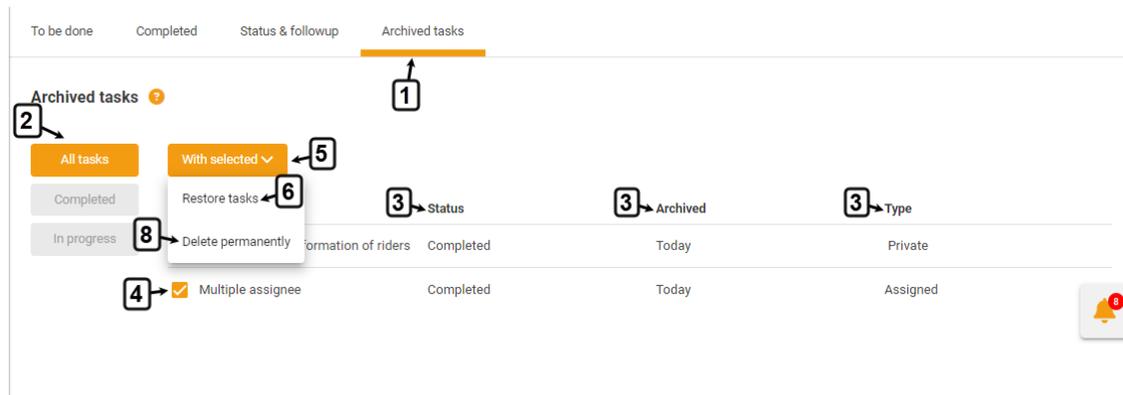
1. Go to the **Archived tasks** tab on the **Tasks** page.

2. You can review your archived tasks listed in three different tabs as follows:

2(a). **All tasks**

2(b). **Completed** (Tasks that were archived after their completion)

2(c). **In progress** (Tasks that were still incomplete when they were archived)

3. On the **Archived tasks** page, you can see the **status** of each task when it was archived, the **date** when it was archived and its **type** i.e. **Private** or **Assigned**.

Restore a Task from Your Archive

4. To restore a task from your archive, **check** the **checkbox** next to its header on the **Archived tasks** tab.

5. Click the **With selected** button above the listed tasks.

6. Click the **Restore tasks** option from the **With selected** dropdown to to restore the selected task(s).

Note: A restored task will become visible to all assignees again with its previous status i.e. completed or in progress.

Delete a Task Permanently

7. To delete a task permanently, open the **With selected** menu for it.

8. Click the **Delete permanently** option from the **With selected** dropdown to to delete the selected tasks permanently.

Now, the system will remove the deleted task from its database permanently and you can never restore it.