

Chainformation Admin User Guide

(Tasks Manager)

Last Updated: February 25, 2026

Welcome to the **Chainformation** user guide. In this version of the Tasks 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 locations.

A task can be assigned low, medium or high priority, making it easier for assignees to determine which tasks to prioritize. Assignees can move a task to the In progress or Completed status based on the required work done for the task. Task owner can move a task to the Cancelled status or the Archived folder if the task is no longer relevant.

You can also create automated and one-time tasks from the Checklists and Audit checklists modules to take actions for deviation and skipped checkpoints from a checklist/audit iteration. See the user guide for **Automated Tasks**

Tasks module also has an integrated Reports dashboard to track progress on tasks assigned to different staff members, roles and locations. A separate user guide is added for **Tasks Reports dashboard** with detailed instructions on how to review and manage tasks reports data from current and completed tasks.

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 and see reports of these tasks. 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.

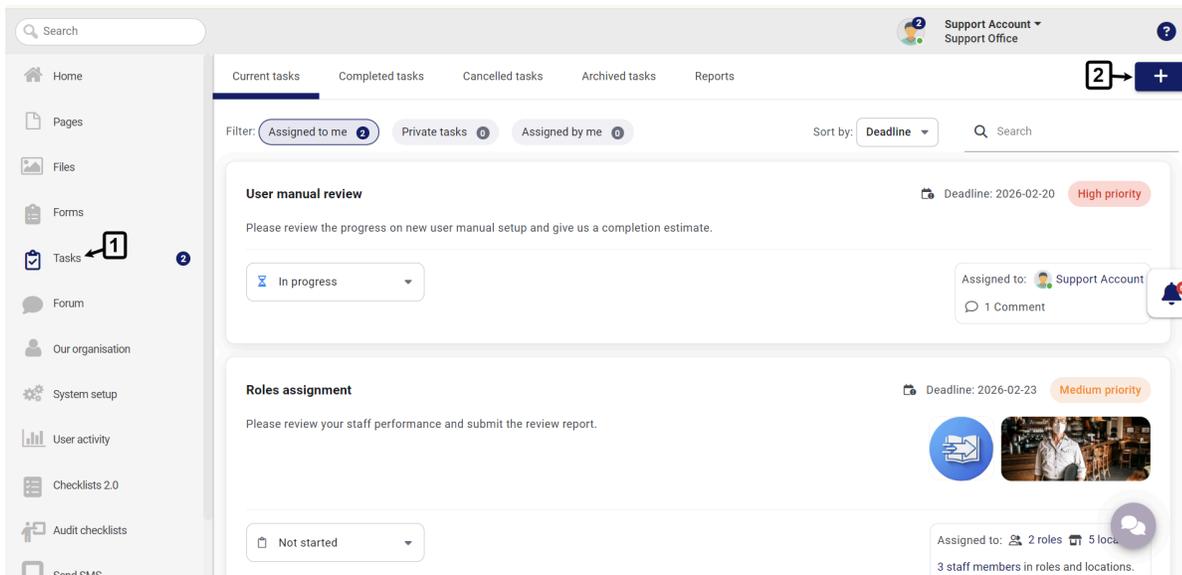
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Create a New Task

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 profile menu to open the **Tasks** page.



You will be redirected to the **Current tasks** tab by default.

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

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

Cancel New task 11 Save

3 Task name*
Front door maintenance **4(b)**

4 Description
Handles and locking mechanism on front door of store need repair. This should be fixed by the end of this week. The door should be working properly before the visit of audit team next week. **4(a)**



5 Priority
Select priority for this task.
Select priority*
Medium priority

6 Assign task

7 Private task
Assign the task only to yourself.

8 Assign staff members
Assign the task to selected staff members.

8(a) Select staff members*

9 Assign roles and locations
Assign the task to all staff members with the selected roles in the selected locations.

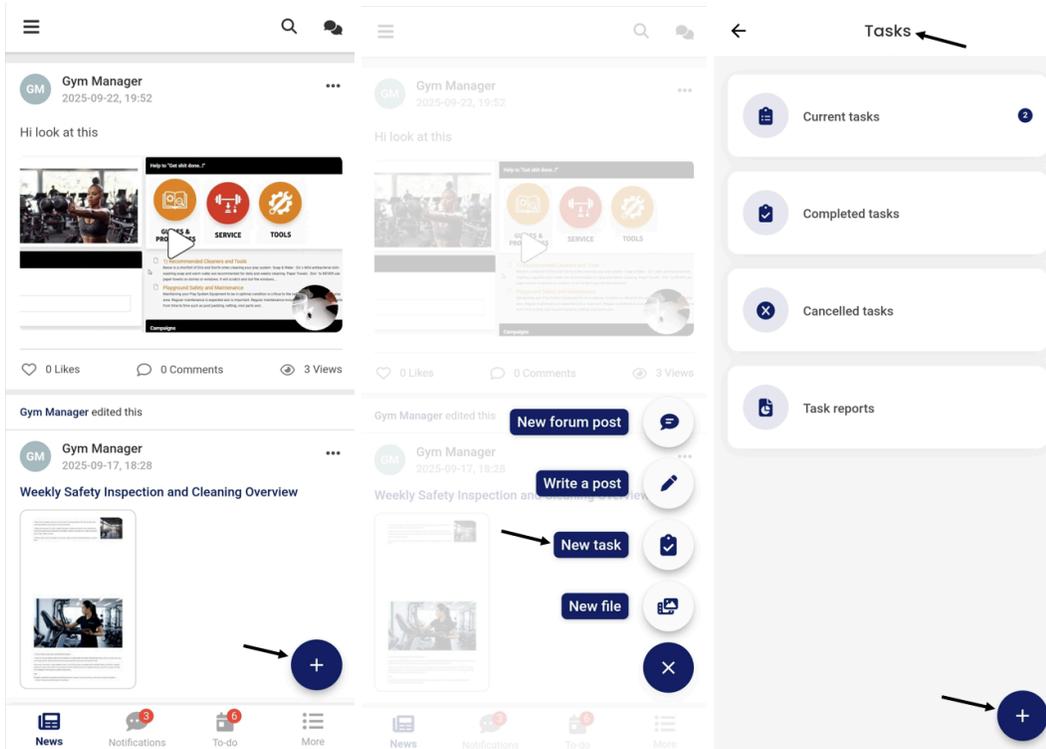
9(a) Select roles*
07 Full Time Staff

9(b) Select locations*
Newquay

10 Deadline
Deadline
2026-02-22 **10(b)**

10(a) YYYY-MM-DD

If you are accessing the platform from the **Chaininformation companion 2.0** app on the phone, you can access the **New task** page by clicking the respective option from the **FAB** menu on your home screen or **Tasks** module.



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, enter a **task name**. This should be explanatory, short and concise.
4. Enter a brief presentation (if needed) of the new task in the **Description** field.
 - 4(a). You can use the toolbar options to format text and add links in the description field.
 - 4(b). You can upload a file from your device or **Chaininformation File Manager** to attach it with the new task. See the User Guide for Files
5. You can define priority of the new task by selecting either of these three options:
 - Low
 - Medium
 - High

Note: All tasks have the default Medium priority unless you select another option.

6. Under the **Assign task** heading, choose who you want to assign this task.
7. 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.

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

8(a). Select the colleagues you want to assign this task from the “**Select staff members**” dropdown.

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

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

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

FYI, you can also use the **Search** feature to find a colleague, role, and/or location based on any of the available data/information. [See the User Guide for Search](#)

Remember, the users, roles and locations 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 location.

Users with only Read and no Share access can only create private tasks for themselves. These users can't assign tasks to any colleague, role or location.

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

11. Now, click the **Save** button in the top right corner of the **New task** page 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 and manage 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** module and the actions you can perform for these tasks.

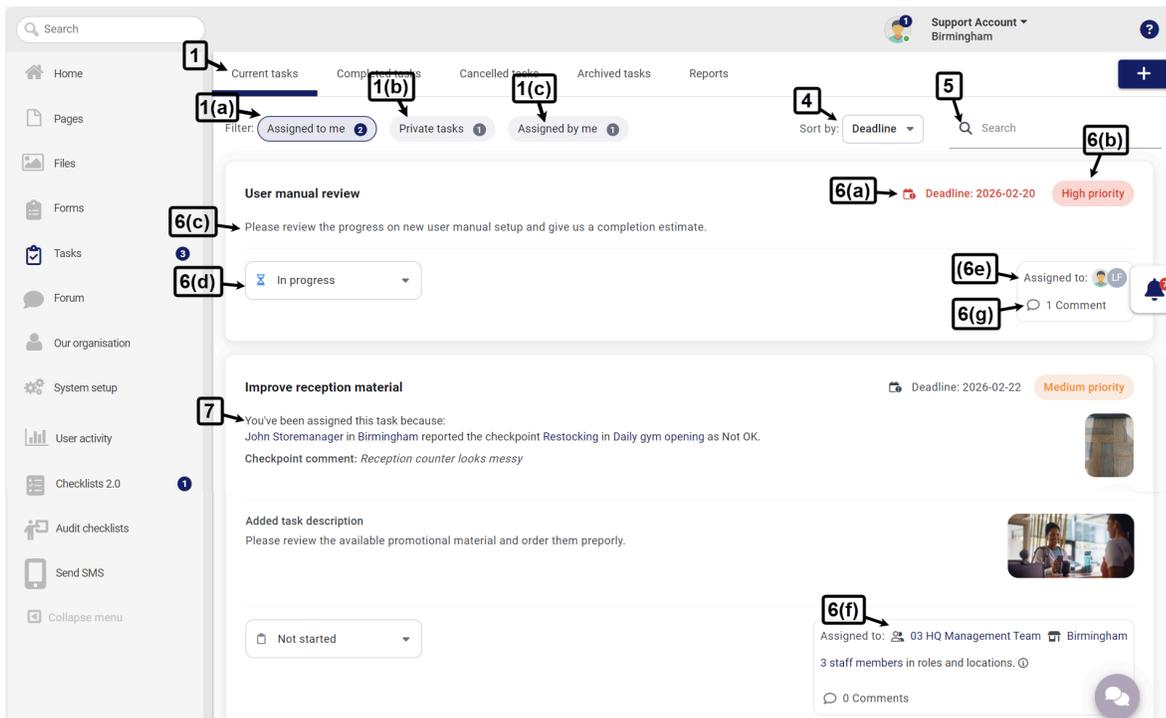
Current tasks

1. By default, the system will redirect you to the **Current tasks** tab on the **Tasks** page where you can view your Not started and In progress 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)

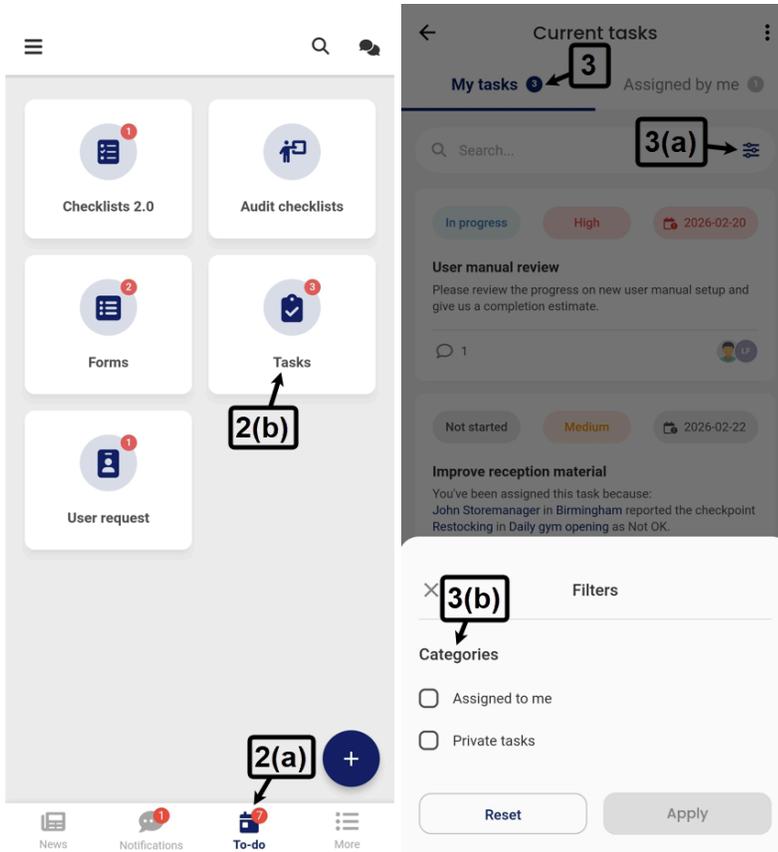
1(c). **Assigned by me** (Tasks you've assigned to different staff members, roles and locations)



2. You can quickly access the **Current tasks** tab from your **To-do** feed on the **Chaininformation companion 2.0** app on your phone.

(3) **Remember**, Assigned to me and Private tasks are both shown in the same “**My tasks**” tab on the app.

(3a) You can choose to view tasks from only the “Assigned to me” or “Private tasks” category by selecting the relevant filter option on the My tasks tab.



4. Current tasks are sorted based on nearest to farthest **deadline** by default.

4(a). You can also sort these tasks based on their **status** (Not started, In progress) or **priority** (High, Medium, Low).

5. You can also use the **Search** field to find a task based on any of the available data/information. [See the User Guide for Search](#)

6. On the **Current tasks** tab, you can view important information for each task including:

6(a). Task deadline (if any)

FYI, **red text color** indicates the task passed its deadline and not completed yet i.e. has “Not started” or “In progress” status.

6(b). Task priority

6(c). Task description and attachments (if any)

6(d). Task status

6(e). Staff members assigned to a task

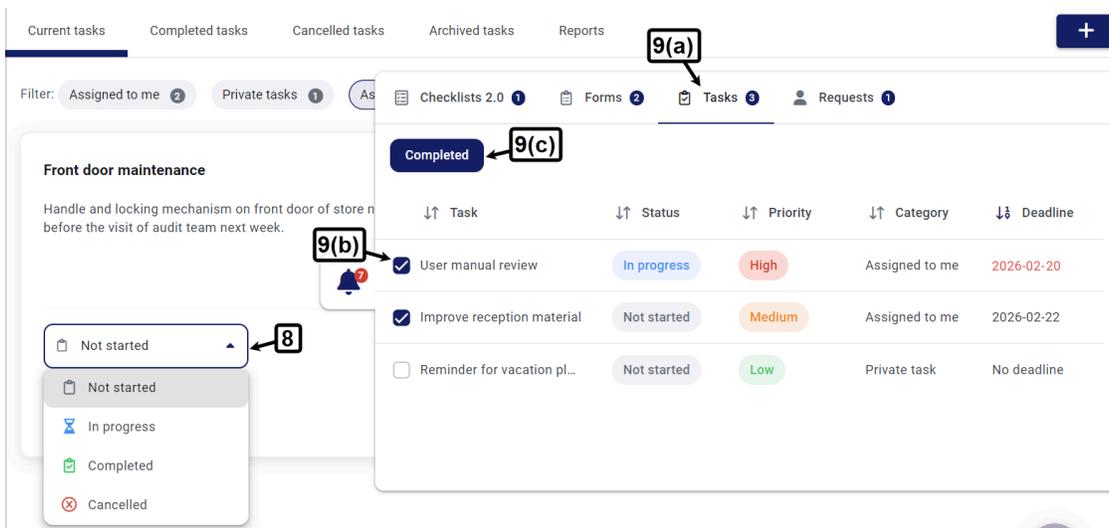
6(f). Roles, locations selected for a task and staff members from these roles, locations, ultimately assigned to the task

6(g). Number of comments added to a task

7. Additional task intro, checkpoint comment and attachments (if any) are also shown for automated tasks created from the **Checklists 2.0** and **Audit checklists** modules. See the User Guide for Automated tasks

Change a task status

8. You can change the status of a current task from the relevant field on the task card in the list.



8(a). When a task status is changed from Not started to In progress and vice versa, it remains in the Current tasks tab.

8(b). When a task status is changed from Not started or In progress to Completed or Cancelled, it's moved from Current tasks to Completed/Cancelled tasks tab.

Remember, only the task creator/owner can change its status to “Cancelled”.

FYI, automated tasks generated from the Checklists 2.0 and Audit checklists modules are owned by the system in the Tasks module. So, no user can cancel an automated task. Though, users with appropriate access rights can archive automated tasks from the Reports. See the user guide for Automated Tasks Reports

9. You can also change the status of Not started or In progress tasks to “Completed” from your **To-do** list on the **Chainformation website platform**.

9(a). Go to the **Tasks** tab on the **To-do** panel to complete the required tasks.

9(b). Check the **checkbox** next to one or more tasks you want to complete.

9(c). Click the **Completed** button to change the status of the selected tasks to completed.

Note: Staff members assigned to a task don't have to change its status individually. When someone changes a task status, it's updated for all assignees at once.

A task owner/creator can always change its status even if they have not assigned a specific task to themselves.

Completed tasks

10. You can view your completed tasks on the **Completed tasks** tab of the Tasks page under the same three categories as on the **Current tasks** tab i.e.

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

10(b). **Private Tasks**

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

Note: Completed tasks are moved to Archived tasks automatically after 30 days of completion. So, you can only find tasks in the Completed tasks tab that are completed in the last 30 days. See the User Guide for Archived tasks

11. The name of the staff member who completed a specific task and its completion date, time is shown in this task info on the Completed tasks tab.

12. Completed tasks are sorted based on the newest to oldest **Completion date** by default.

12(a). You can also sort these tasks based on their **deadline** or **priority** (High, Medium, Low).

13. You can change the status of a completed task from the relevant field on the task card in the list.

13(a). When a completed task is reopened i.e. its status changed from Completed to Not started or In progress, it's moved from Completed tasks to Current tasks tab.

13(b). When the task owner changes its status from Completed to Cancelled, it's moved from Completed tasks to Cancelled tasks tab.

Cancelled tasks

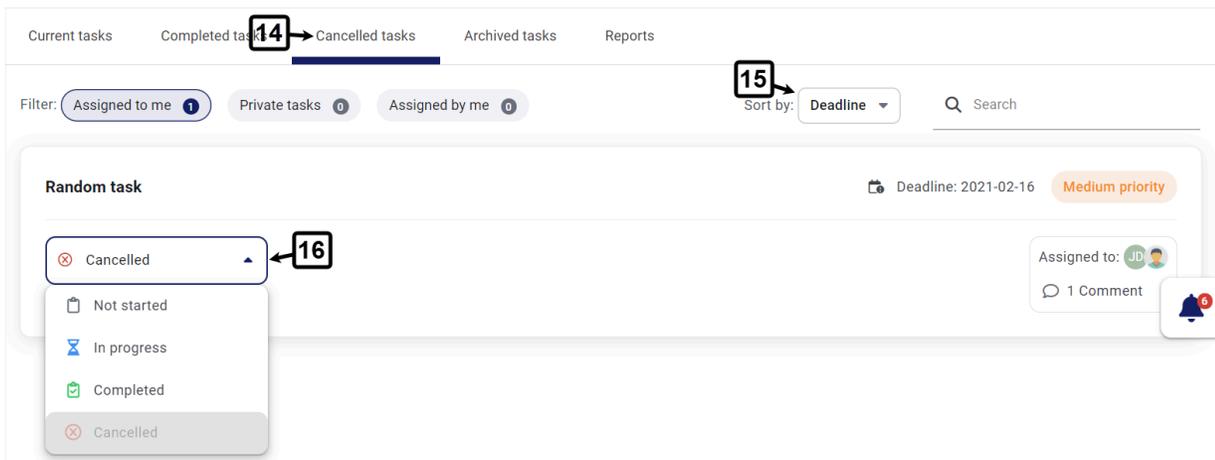
14. You can view your cancelled tasks on the **Cancelled tasks** tab of the Tasks page under the same three categories as on the **Current tasks** tab i.e.

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

14(b). **Private Tasks**

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

Note: Cancelled tasks are moved to Archived tasks automatically after 30 days of cancellation. So, you can only find tasks in the Cancelled tasks tab that are completed in the last 30 days. [See the User Guide for Archived tasks](#)



15. Cancelled tasks are sorted based on nearest to farthest **deadline** by default.

15(a). You can also sort these tasks based on their **priority** (High, Medium, Low).

16. You can change the status of a cancelled task from the relevant field on the task card in the list.

Note: Only the task creator/owner can change its status to “Cancelled”. But, assigned staff members can change the status of a cancelled task to another status.

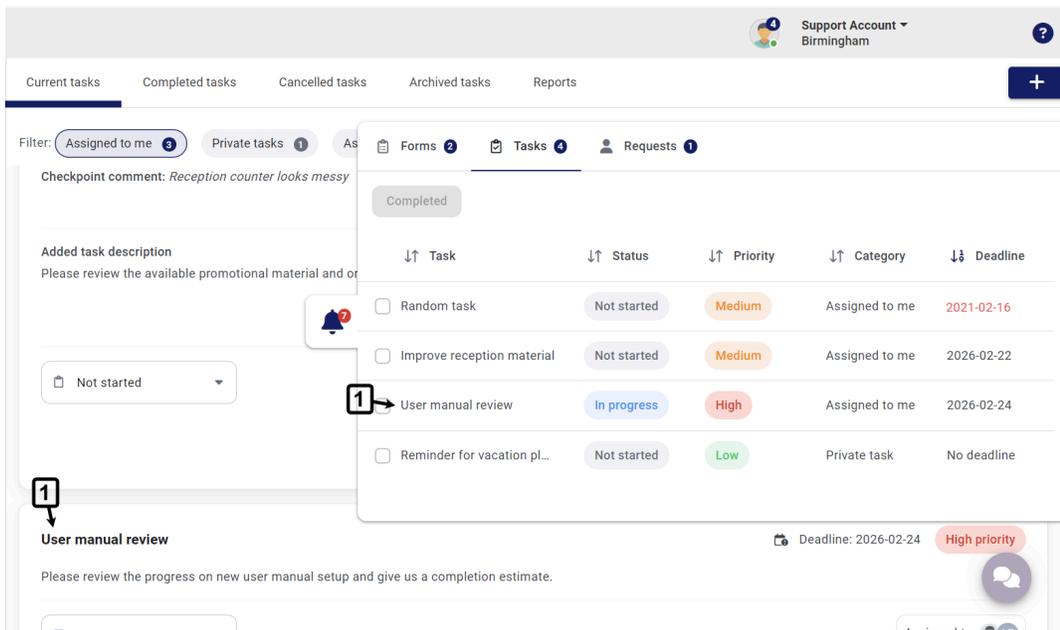
16(a). When a cancelled task is reopened i.e. its status changed from Cancelled to Not started or In progress, it's moved from Cancelled tasks to Current tasks tab.

16(b). When a task status is changed from Cancelled to Completed, it's moved from Cancelled tasks to Completed tasks tab.

View and Edit Task details

1. You can view details of a task by clicking its name/card on the relevant tab and category in the **Tasks** module.

You can also access the details page of a task by clicking its name from the Tasks tab on the **To-do** panel.



2. On the **Task details** page, you can review its full description and attachments (if any).

3. You can review the **task deadline** (if any) and **priority**.

4. You can review and change **task status** (if required) from the relevant field on the task details page.

5. You can review all status changes and other user activity on the **task log**. A task log might include entries for:

- Created task
- Updated deadline
- Updated priority

- Added user to task
- Started task
- Completed/Cancelled task
- Reopened task
- Archived task
- Restored task

The screenshot displays the 'User manual review' task details page. It includes a 'Task details' section with a 'Deadline: 2026-02-24' and 'High priority' status. A 'Status' dropdown is set to 'In progress'. The 'Comments (4)' section shows a conversation between Support Account, Luigi Forza, and Dmitry N. The 'Task log' section lists actions such as 'Updated the deadline', 'Reopened the task', 'Completed the task', 'Added Luigi Forza to the task', 'Started the task', and 'Created task'. The 'Assigned staff members' section lists 'Support Account Birmingham' and 'Luigi Forza Milano'. A text input field at the bottom contains the draft comment 'First draft will be ready tomorrow.'.

2 → Task details

3(a) → Deadline: 2026-02-24

3(b) → High priority

4 → Status: In progress

5 → Task log

6 → Assigned staff members

8 → Comments (4)

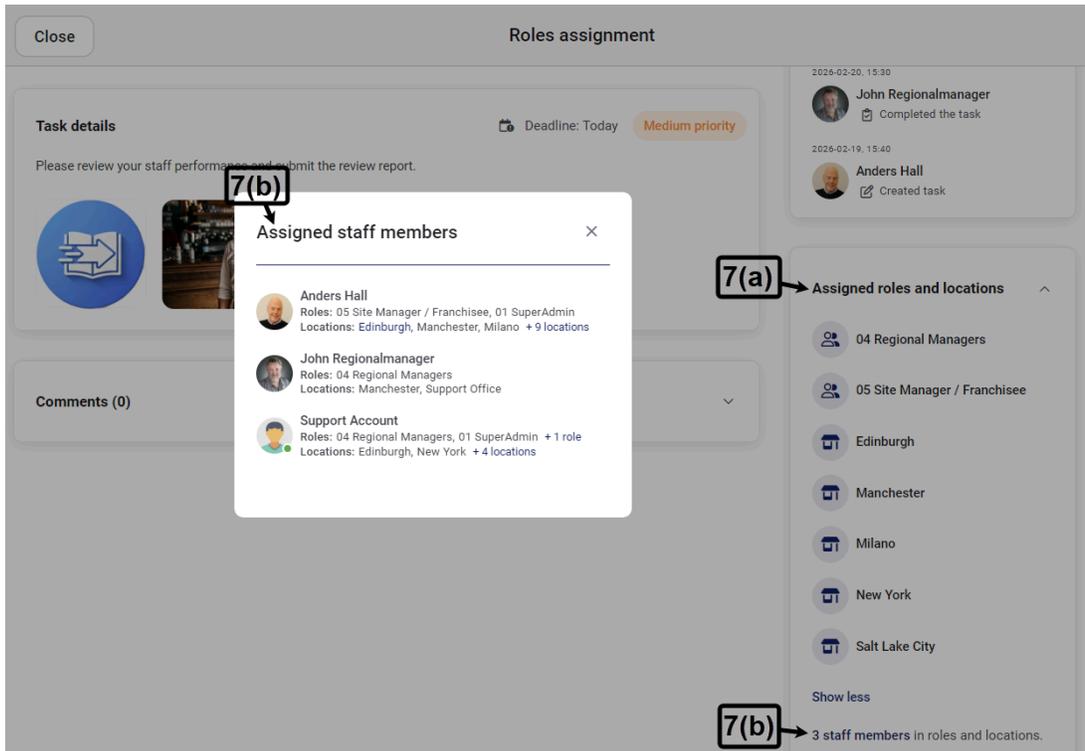
8(a) → Add comment

9 → Add staff members

6. You can view **Assigned staff members** on the task details page if this task is assigned directly to selected staff members.

7(a). You can view **Assigned roles and locations** on the task details page if this task is assigned to selected roles and locations.

7(b). Staff members from these roles, locations who are ultimately assigned the task can be viewed on an overlay by clicking “**x staff members**” label.



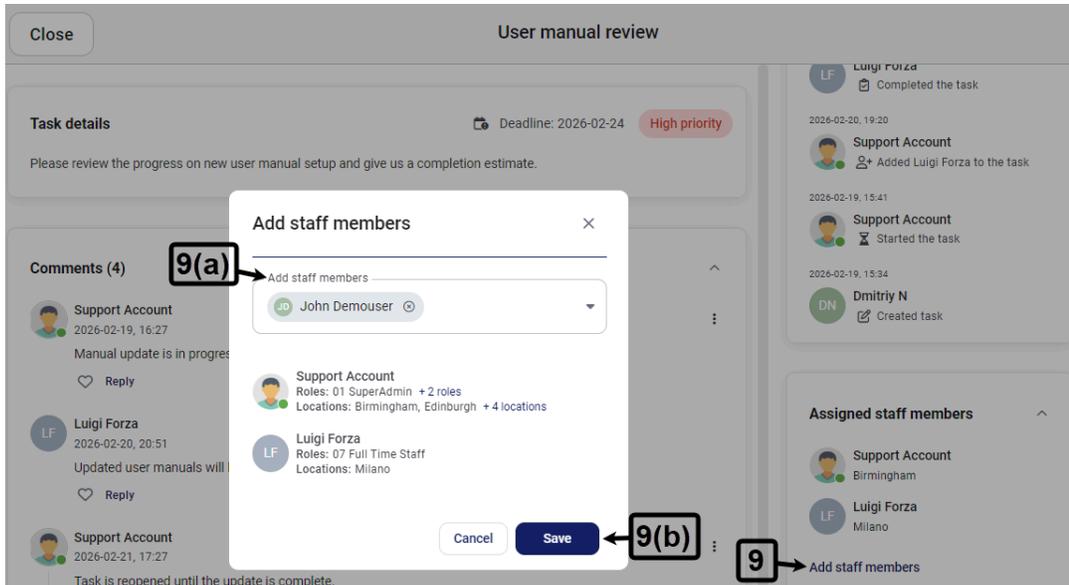
8. You can view comments added to the task, and **add a new comment** to it on the **Task details** page.

Commenting on a task is similar to writing a News/forum post. Just like a post, you can customise your comment on a task using various typographical and attachment options. [See the User Guide for News and Forum Posts](#)

Add staff members to a task

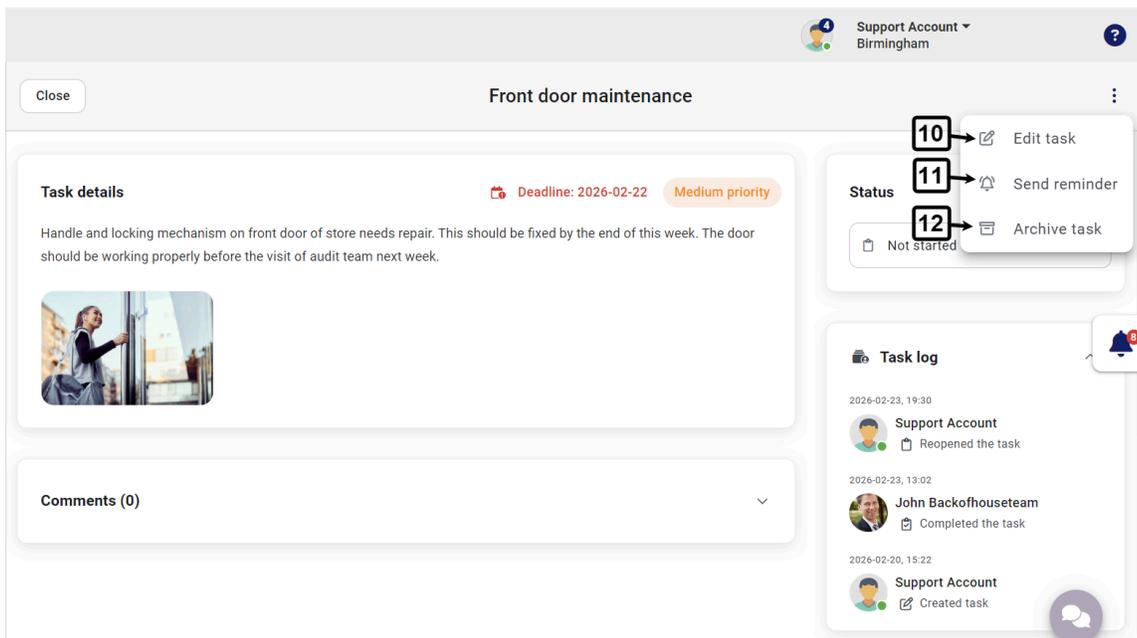
9. When a task is assigned to selected staff members, these task assignees can add their selected colleagues to the task by clicking the “**Add staff members**” button below the Assigned staff members list (item 6).

9(a). This will open the **Add staff members** overlay where the current user can select their colleagues from the dropdown and add them to the task.



A staff member added to the task by an assignee can change its status and add comments like other assigned staff members.

Note: Assignees can't add new staff members, roles or locations to a task assigned to selected roles and locations. Only the task owner/creator can add, remove roles and locations from these tasks by editing the task. See the User Guide for **Edit task**



Edit task

10. Task owner can edit it by clicking the **Edit task** option in the top-right corner of the **Task details** page.

This will open the **Edit task** page where you can update its name, description, media, priority assignees, and/or deadline as demonstrated in the previous section. [See the User Guide for Create a New Task](#)

Cancel Edit task: Front door maintenance Save

Task name*
Front door maintenance

Description
Handle and locking mechanism on front door of store needs repair. This should be fixed by the end of this week. The door should be working properly before the visit of audit team next week.



Priority
Select priority for this task.
Select priority*
Medium priority

Assign task

Private task
Assign the task only to yourself.

Assign staff members
Assign the task to selected staff members.

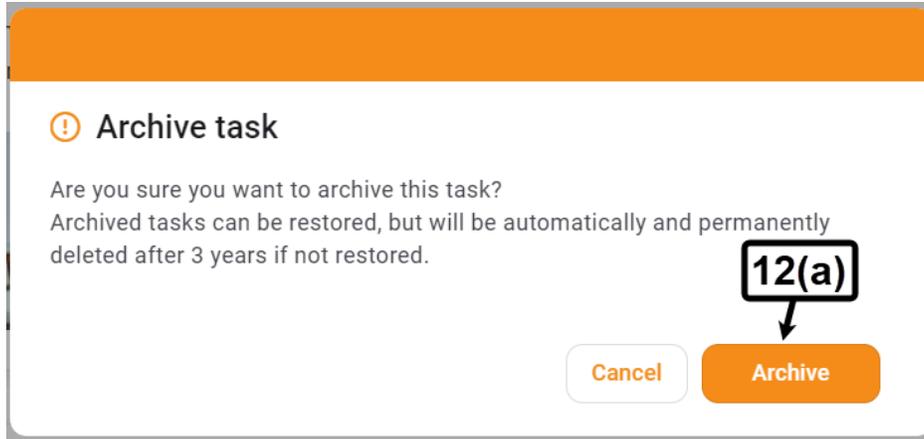
Assign roles and locations
Assign the task to all staff members with the selected roles in the selected locations.

Send reminder for an incomplete task

11. Task owner can **Send reminder** to the assigned staff members to complete the task from the options of current tasks i.e. tasks that have Not started or In progress status.

Archive a task

12. Task owner can move it to the Archived tasks tab by clicking the **Archive task** option in the top-right corner of the **Task details** page.



When a task is archived, it is removed from the Current, Completed or Cancelled tasks tabs of assigned staff members.

Task owner can't edit the archived task or send reminders for it until it's restored from the Archive. Task assignees can't change status of the archived tasks, add comments or new staff members to it until it's restored from the Archive. See the User Guide for **Archived Tasks**

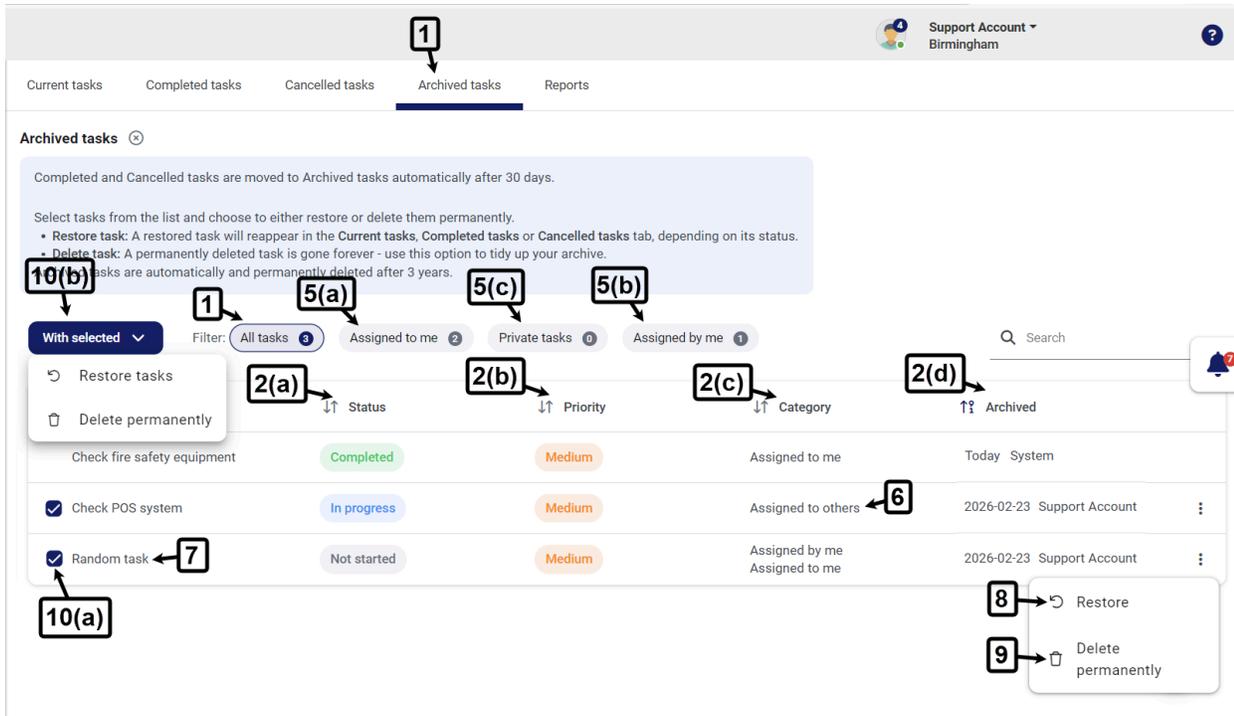
Remember, only the task owner/creator has access to the Edit task, Send reminder and Archive/Restore task options on the task details page. Though, other users with appropriate access rights can send reminders for tasks from the Reports. See the user guide for **Tasks Reports**

FYI, automated tasks generated from the Checklists 2.0 and Audit checklists modules are owned by the system in the Tasks module. So, no user can edit an automated task. Though, users with appropriate access rights can archive automated tasks from the Reports. See the user guide for **Automated Tasks Reports**

Manage Your Archived Tasks

Once you have opened the **Tasks** page as demonstrated in the previous section, you can review and manage your archived tasks on the "**Archived tasks**" tab.

1. By default, the system will redirect you to the **All tasks** filter on the **Archived tasks** tab where you can view all archived tasks from different statuses and categories.



2. You can see the **status** of each listed task when it was archived, its priority, category and the **date** when it was archived.

3. Archived tasks are sorted based on nearest to farthest **archived date** by default.

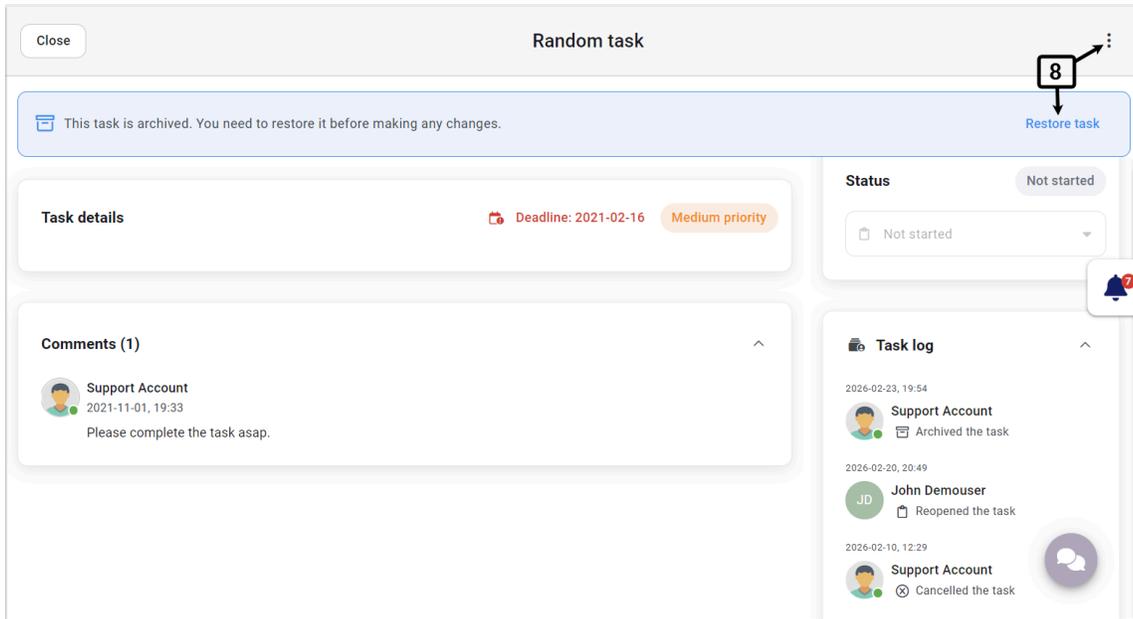
3(a). You can also sort these tasks based on their **status, priority or category**.

4. You can also use the **Search** field to find an archived task based on any of the available data/information. See the User Guide for Search

5. You can choose to view tasks from only the “**Assigned to me**”, “**Assigned by me**” or “**Private tasks**” category by selecting the relevant filter option.

4. You might also see some archived tasks with the “**Assigned to others**” category label in case you have archived automated tasks assigned to your colleagues from Reports. See the user guide for Automated Archived Tasks

7. You can click on an archived task to see more details including the task log, assigned staff members or roles, locations and comments added to the task.



Remember, you can't make any changes to the archived task until it's restored from the Archive.

Note: You can't click on an archived task assigned to your colleagues i.e. automated archived tasks with the "Assigned to others" label. Though, you can restore it from the Archive or permanently delete it.

Manage Automated Archived Tasks

Remember, only the task owner/creator can restore it from the Archive or permanently delete it.

As mentioned above, automated tasks generated from the Checklists 2.0 and Audit checklists modules are owned by the system in the Tasks module. So, we've have some special rules in place for automated tasks that allow assignees of these tasks and other users with appropriate access rights to Archive/Restore automated tasks or permanently delete them.

A user has access to the Archive/Restore and Delete permanently options for an automated task if this user has rights to

- see this automated task report
- share new tasks to all assigned roles and locations or staff members

Restore a task from your Archive

8. To restore a task from your archive, click the "Restore task" button in the banner on the task view page or options menu.

8(a). When a “Not started” or “In progress” task is restored from the Archive, it’s moved back to the Current tasks tab.

8(b). When a “Completed” task is restored from the Archive, it’s moved back to the Completed tasks tab.

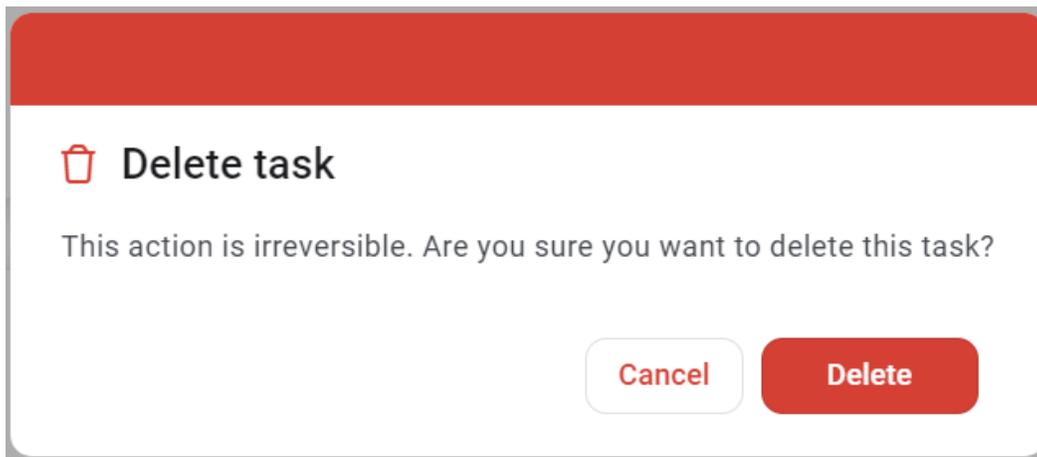
8(c). When a “Cancelled” task is restored from the Archive, it’s moved back to the Cancelled tasks tab.

Now, the task owner can edit this task or send reminders for it and assignees can change its status, add comments or new staff members to it.

Delete a task permanently

Remember, an archived task is automatically deleted from the Archive after 3 years. You can also manually delete an archived task before this period.

9. To delete a task from your archive, click the "**Delete permanently**" option for this task from its options menu in the archived tasks list or its view page and click the “Delete” button on the warning dialog to confirm your action.



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

10. You can also restore/delete two or more tasks together by selecting these tasks from the archived tasks list and clicking the relevant option from the “**With selected**” dropdown.