OnCore Task Lists Management

Introduction

Study teams can use Task Lists to track progress toward major milestones in OnCore. By using the task list, events and statuses can be monitored by administration, using the Insights Dashboard.

Financial Coordinators have access to edit task list dates and assign tasks to specific people or roles.

Accessing Task Lists

You can access a task list at any time by navigating to **PC Console > Status** and opening the Task List tab. The active Task list(s) will be in the second box under the header **Task Lists**.

An easier way for a user to find assigned task is to add home screen widgets for Active and Upcoming Tasks.

1. Click the OnCore logo at the top left to return to your home screen.

2. Click the gear icon under the User Menu.
3. Select the Add checkboxes for the Active Tasks and Upcoming Tasks widgets.

![Image of Home Screen Configuration](image)

4. Click **Save**.

![Image of Save button](image)

5. Click the Home Page link in the User Menu (1) or click the OnCore logo (2) at the top left of the window to return to the home page to view the newly created widgets.

![Image of Home Page link and OnCore logo](image)
**Active Tasks** – Displays upcoming tasks assigned to a user by name or role. Active tasks have a Target Date and are not waiting on any previous tasks to be completed. Active tasks represent to-do items that the user can complete as soon as possible.

**Upcoming Tasks**- Displays upcoming tasks assigned to a user by name or role. Upcoming tasks have a Target Date and have at least one incomplete previous task or have no Target Date yet. Upcoming tasks represent to-do items that the user does not have to work on right away.

If all Financial Tasks in the Research Financials TL (UK) are assigned to you (4 total), All 4 tasks will appear in the Upcoming Tasks widget. A target date must be entered to move the first task to the Active Tasks widget.

### Adding Target Dates

Task owners can start the task list and move items to the Active Tasks window by setting target dates.

1. Open your task list by clicking any upcoming task, or navigating to **PC Console>Status>Task Lists** tab, and clicking on your task list.

2. Enter a Target Date for the task to be completed. For example, if that date is 5 days from now, enter a Target Date of **t+5** (five days from today) for the first task, then press **Tab** or click off the field. If you manually type a date, do so in mm/dd/yyyy format.
3. A message will ask you to Confirm Recalculate and previews the new date. Click Recalculate.

4. Click Save.

5. Click Close at the bottom right of the page.
The status of your task list is now **In Progress**. To view your tasks on the widgets, click the OnCore home button at the top left of the screen. All tasks with dependencies (“after logic”) now have Target Dates.

### Assigning Tasks

Task owners can reassign tasks to a role or a specific person.

1. Click the **Owner** field to the right of the task that will be reassigned. Search for the name or role to assign the task. A search box will appear below with a list of names to scroll through.
2. Search by typing just a few letters of the name or role in the search box, and click to select from the filtered list. The new owner’s name (or title if assigned to a role) will appear in the Owner Box.

3. Click **Save** at the top right of the task list.

4. Click **Close** at the bottom right of the screen.

Once you assign a task to another person or role, it will no longer show up in your widgets as an Active or Upcoming Task. You will still be able to see all of the tasks and their owners when viewing the full task list.

**Marking Tasks Complete**

Once a task is completed, mark that task as completed on the task list.

1. For the first task on your list, enter a **t** in the **Completed Date** field. Once you click away it will fill in today’s date. If you completed the task before today, enter the actual date you completed the task in mm/dd/yyyy format.
2. Click **Save**.

Once marked complete, a task will no longer appear in the home screen widgets. If task #2 in the Upcoming Tasks list is also assigned to you, it will move to your Active Tasks widget.

### Add Attachments and Comments to Tasks

For each task on your task list, you can enter communications for other users to read. You can also add files and URLs as attachments to a task.

1. On the task you would like to add a comment to click the **Communications** link.

2. Enter the date of the comment in the **Date** field. This is a required field.

3. In the **Communication** field, enter *comments* regarding the task.

4. Click **+ Add**. This communication is now added to this task and can be viewed by other users of this task list.

5. Click **Done**.

6. To add a file attachment or a URL to the task list, click the **Attachments** link. Follow the directions described above (steps 2-5) to add the attachment.

7. Click **Close** to return to the PC Console.

### Completing a Task List

Once the last item on the list has a Complete Date, the task list can be moved to Complete Status.
1. In the top right corner of your task list, click **Update Status**.

![Update Status](image)

2. **Click** on **Move to ‘Complete’ Status**.

3. Click **Save** and **Close**.

The status of your task list is now **Complete**.

![Status](image)